



Newport-Mesa Unified School District

Construction Management Services | RFQ# 119-21

February 22, 2021

February 22, 2021

Jonathan Geiszler
Newport Mesa Unified School District
Purchasing Department
2985 Bear St., Bldg. A
Costa Mesa, CA 92626

Re: Request for Qualifications # 119-21 | Construction Management Services

Dear Mr. Geiszler,

Cumming is pleased to present our qualifications and proposal to the Newport Mesa Unified School District (District) to provide construction management services for the District's modernization and new construction projects. With our first-hand knowledge providing these services for more than 50 school districts across California, Cumming is uniquely familiar with the processes and procedures underlying school construction.

We confirm receipt of the Q&A document issued by NMUSD. While not a formal addendum, we have included a signed copy of the Q&A document with the Firm Proposal/Offer Form in Section 7 herein as requested.

Why the Cumming Team?

- **Our qualifications and experience.** Cumming has successfully provided program, project, and construction management support for more than 2,500 new construction projects throughout California since our founding in 1996. Time and again, we have successfully supported K-12 school districts in Southern California, such as Newport-Mesa Unified School District, Anaheim Elementary School District, Anaheim Union High School District, Compton Unified School District, Glendale Unified School District, Los Angeles Unified School District, Hacienda-La Puente Unified School District, Orange Unified School District, Norwalk-La Mirada Unified School District, and Santa Monica-Malibu Unified School District, among many others. In all, our education portfolio accounts for more than \$20 billion in construction.
- **Our industry recognition and accolades.** Cumming is ranked 17th in *Engineering News-Record's* listing of the Top 100 Construction Management-for-Fee firms and is currently ranked 8th among the nation's top 80 construction managers by *Building Design + Construction*. In addition, Cumming has received CMAA's Project Achievement award for our performance on the Katella High School DROPS Site Improvement Project at Anaheim Union High School District (2018) and the comprehensive renovation of the Wilson High School Auditorium at Long Beach Unified School District (2019). Most recently, Cumming's work on the Anaheim High School Aquatics Center Project at Anaheim Union High School District was awarded CMAA's 2020 Project Achievement Award.

We have selected our best team members for the District, each of them experts in their proposed roles and well-trained in forming cooperative partnerships across the lifecycle of the project. In addition to our key personnel, your program will have the support of a team of in-house professionals who possess both individual and collective experience working with California school districts over the last decade, including one of the largest educational bond programs in the country, for Los Angeles Unified School District (LAUSD).

As Executive Vice President and proposed Project Executive, I am authorized to represent the firm and make binding decisions in all matters relating to the RFQ and our statement of qualifications/proposal. I will also provide corporate oversight at the executive level on an as-needed basis.

Thank you for this opportunity to submit our qualifications and proposal for your projects.

Sincerely,



Anthony Sanchez, RME, DBIA Assoc.
Executive Vice President

Table of Contents

Section 1 Business Profile 1

Section 2 Experience 50

Section 3 Project and Cost Management..... 61

Section 4 Subconsultants 69

Section 5 References..... 70

Section 6 Legal Issues..... 71

Section 7 Other Forms 72



Section 1

Business Profile

3.1.1. Include legal form of Offeror (LLC, partnership, corporation, etc.), number of years in business, home office location, local office location (if different). If Offeror is a wholly owned subsidiary of a "parent company," identify the "parent company." Offeror who is submitting as a Joint Venture must qualify with the Joint Venture's federal tax identification number as the Joint Venture.

Legal form of Offeror

Cumming Management Group, Inc. is a privately-held C-corporation founded in California in 1996 and incorporated in the State of California on April 6, 2007.

Number of years in business

25 years

Home office location

130 Vantis Drive, Suite 110, Aliso Viejo, CA 92656

Local office location

130 Vantis Drive, Suite 110, Aliso Viejo, CA 92656

Parent company

Cumming Management Group, Inc. is a wholly owned subsidiary of Cumming Group, Inc.

Joint Venture

N/A; Cumming is not submitting as a joint venture.

3.1.2. Identify the ownership structure of the Offeror and furnish a one-page history, including number of years the firm has provided similar services for both public and private sector clients. If the RFQ is being submitted by a Joint Venture of two or more firms, each firm must provide background/historical information. The statement must describe the proposed working relationship of the firms and the percentage of the total work each firm is expected to complete. Each firm that is part of the Joint Venture must also provide a true, correct, executed copy of the Joint Venture Agreement that shall state each individual Joint Venturer is jointly and severally liable for the liabilities and obligations of the Joint Venture to the District. Provide resumes and responsibilities of the individuals who would be assigned to this project.

Ownership Structure

Cumming Group, Inc. owns 100% of Cumming Management Group, Inc. Cumming is managed by 17 principals, including David Baird (CEO), Finlay McClay (COO), A. Al Jajeh (CFO), five managing principals, and six Executive Vice Presidents/Vice Presidents. Each principal has a specific responsibility tied to regions, service lines, and sectors.

Our education practice in California is managed by Anthony Sanchez, Executive Vice President and proposed Project Executive for the District, who has more than 30 years of program, project, and construction management experience within the education sector.

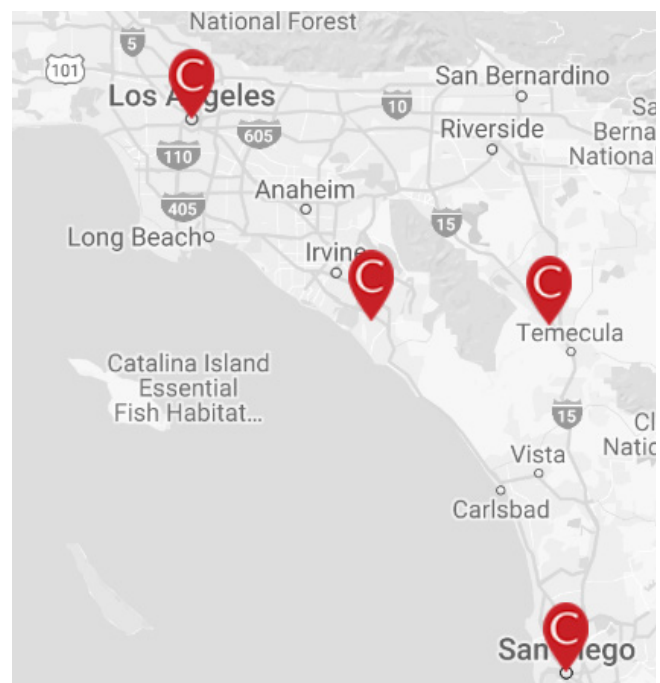
Firm Profile

Cumming was founded on June 1, 1996 in Southern California to provide project owners with construction, project, and cost management services. We are a privately-held California corporation with more than 950 employees and 36 offices worldwide — including four in Southern California (see map below).

We are an industry leader in construction and cost management, owner's representation, as well as planning and scheduling. In fact, we are recognized and ranked as one of the very best project/construction management firms in the region and the nation, all while maintaining our independence and individualized level of service. This allows us to focus on what we do best: delivering top-notch projects on schedule and within budget, to the lasting satisfaction of our clients.

For nearly 25 years, Cumming has provided full-scope, beginning-to-end construction management for thousands of California public and private sector projects, during which time we have honed our approach to providing topnotch services, including everything from comprehensive project, program, and construction management to cost management/estimating, scheduling, energy consulting, dispute resolution and avoidance services, and more. Our approach to providing services is based on the idea that we work for you: everything we do is on your behalf and in your best interest.

We have provided our resumes and responsibilities of the team members in the following section, 3.1.3.



3.1.3. Provide the qualifications of recent (within the past ten years) and relevant experience of staff to be assigned to District projects, including resumes. Identify names of senior members and length of time in firm.

Proposed Project Team

We are proposing the team members listed on the organizational chart on the following page for the District's modernization and new construction projects. Our proposed personnel are fully versed in construction management services from preconstruction and planning to project close-out and occupancy. This team also has the full support of our team members within our local office, who are readily available to provide support on an as-needed basis.

Our team members are fully versed in construction management services from preconstruction and planning to project closeout and occupancy. These proposed team members have supported multi-million-dollar public works projects and provided comprehensive construction/project management services, such as cost estimating, scheduling, and constructability reviews. They also have extensive expertise serving District needs and priorities, working on occupied campuses, and collaborating with school officials, local communities, and local and state agencies.

Senior Members

The following team members are the senior members of the team on the organizational chart on the next page. All others team members are available on an as-needed basis.

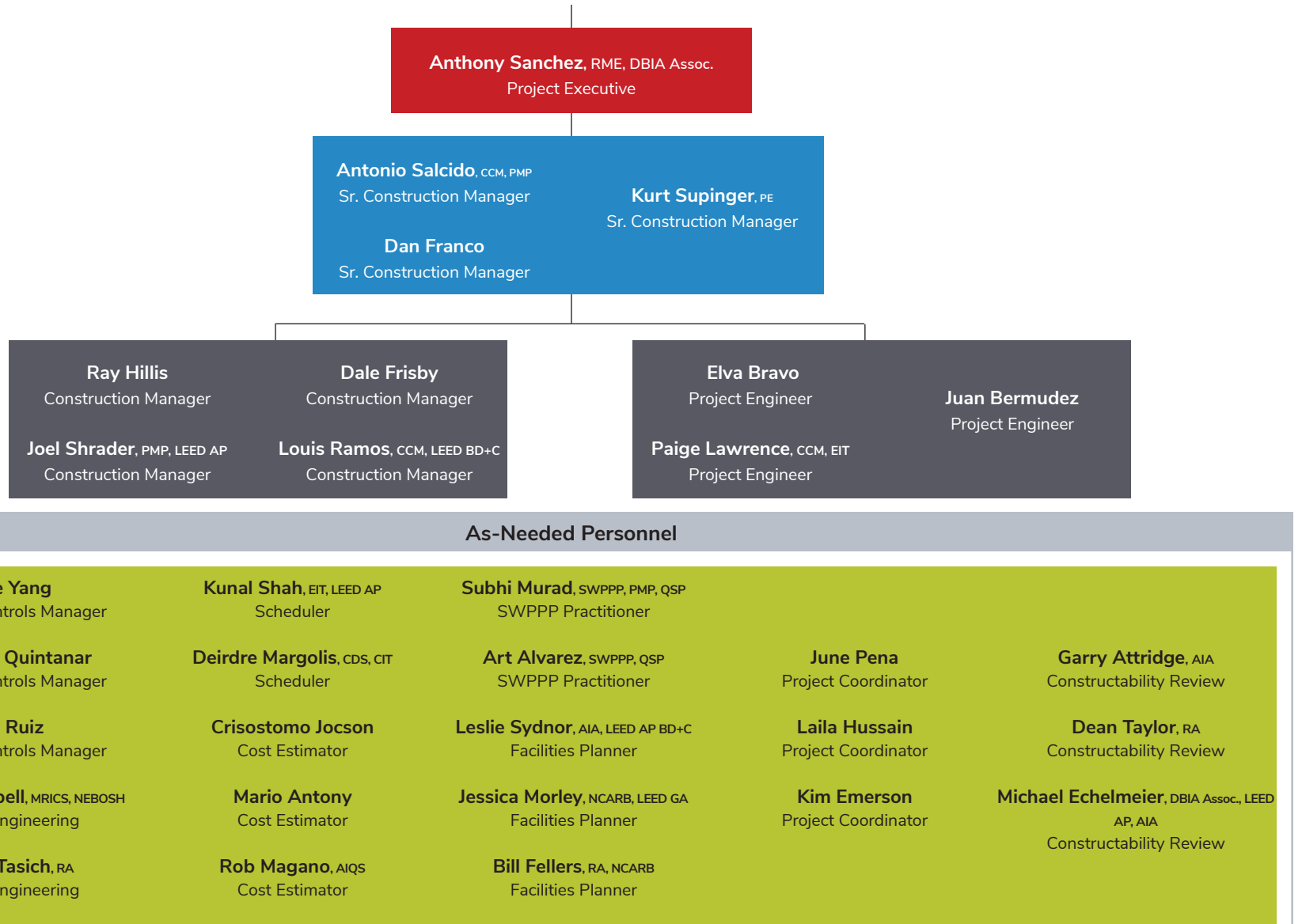
Senior Team Members	Role	Years with Firm
Anthony Sanchez	Project Executive	21
Antonio Salcido	Sr. Construction Manager	11
Dan Franco	Sr. Construction Manager	2
Kurt Supinger	Sr. Construction Manager	6
Ray Hillis	Sr. Construction Manager	2
Joel Shrader	Construction Manager	3
Dale Frisby	Construction Manager	2
Louis Ramos	Construction Manager	2
Elva Bravo	Project Engineer	3
Paige Lawrence	Project Engineer	3
Juan Bermudez	Project Engineer	7

Project Team Resumes

On the following pages, we have provided resumes detailing the qualifications, certifications, and experience of each member of the proposed project team, including key personnel and as-needed staff, for the District's consideration.



Organization Chart



Anthony Sanchez, RME, DBIA Assoc.

Project Executive

Education

Construction Management,
Rancho Santiago College,
Santa Ana, CA

Licenses

California Licensed General
Building Contractor (B),
Contractor State License Board,
License No. 956988

Certifications

DBIA Associate, Design-Build
Institute of America

OSHA 10-hour

Affiliations

Construction Management
Association of America (CMAA),
Southern California Chapter

Awards

LAUSD Chief Facilities Executive
Recognition Award,
Construction Golden Hammer

CMAA Project Achievement
Awards:

- City of Arcadia Police Facility
and Emergency Operations
Center
- Anaheim Union High School
District, Katella High School
DROPS Site Improvement
Project (2018)
- Long Beach Unified School
District, Wilson High School
Auditorium Renovation
(2019)
- Anaheim Union High School
District, Anaheim High
School Aquatics Center
Project (2020)

Anthony Sanchez represents Cumming as the Executive Vice President responsible for managing major capital improvement projects and programs throughout California while also serving as Cumming's Project Executive and Principal-in-Charge for various K-12 school districts, community colleges, higher education institutions, and local municipalities. In this role, Anthony directs the management and operations for Cumming's education and public works portfolio, which exceeds \$7 billion dollars of public construction.

With 30+ years of experience within the construction industry, Anthony has been involved with program, project, and construction management; design management; schedule and cost management; contract administration; and stakeholder engagement for multi-million and billion-dollar K-12 programs and projects throughout all phases of construction.

Relevant Experience

Executive Vice President, Cumming Management Group, Inc.
November 2000-Present

Serves as Cumming's Project Executive for multi-million and billion-dollar K-12 school districts, community colleges, higher education institutions, and other public entities. Responsibilities include the management, oversight, and successful execution of large and complex construction programs and projects, such as:

- Anaheim Elementary School District
- Anaheim Union High School District
- Compton Unified School District
- Glendale Community College District
- Glendale Unified School District
- Hacienda-La Puente Unified School District
- Long Beach Unified School District
- Los Angeles Community College District
- Los Angeles Unified School District
- **Newport-Mesa Unified School District**
- Norwalk-La Mirada Unified School District
- Orange Unified School District
- Pepperdine University
- Rancho Santiago Community College District
- San Diego Unified School District
- Santa Monica-Malibu Unified School District
- South Orange County Community College District

Antonio Salcido, CCM, PMP

Senior Construction Manager

Education

Electrical Engineering Studies,
San Diego State University,
San Diego, CA

General Education, Mira Mesa
Community College, San Diego,
CA

Certifications

Certified Construction Manager,
CMAA, 2017

Project Management
Professional, Project
Management Institute, 2007

Training

30-Hour OSHA

Project Management Scheduling,
Primavera 6S Specialist,
Scottsdale, AZ

Software

AutoCAD
Expedition,
Microsoft Office Suite
Primavera
Progen- Gordian
Prolog

Antonio has 20 years of experience in public and private construction projects valued at up to \$100 million. He is an expert in Initiation, planning, execution, monitoring and controlling, and close-out processes. Antonio has the proven ability to ensure his projects come in on budget and on time.

Antonio strives for success on each and every project. With a relentless attitude for collaboration with owner personnel, contractors, site administrators, inspection, architect and engineers, the communication and project documents are rapidly processed.

Responsibilities and duties include:

- Develop strategies, organize and coordinate with contractor, architect, inspectors, and client to meet schedule requirements and maintain the budget
- Resolve field and technical issues
- Writing and updating monthly projects status reports
- Quality control coordination
- Change Management and reporting
- Develop budgets, cost control and reporting
- Process and review RFIs
- Process and review change orders
- Review schedule, monitor and track progress
- Conduct weekly meetings and manage minutes
- Field observation and reporting

Relevant Experience

Benton and Covallis Middle School Landscape Renovation and Accessory Structures, Norwalk La Mirada Unified School District, Norwalk, CA

Construction Manager for the Benton MS Landscape and Small Concessions Building (\$8M) – 400,000 sq. ft.; and the Covallis MS Landscape and Small Concessions Building (\$6M) – 300,000 sq. ft. Projects included landscape renovation, a new track and field, new concession building, site lighting, relocation portable buildings, paving and playground reconstruction, and outdoor exercise equipment. Management of the architect, design consultants, and the IOR to provide clear buildable construction documents to the general contractor to deliver a quality project to the client as a team.

La Mirada High School Gymnasium Renovation, Norwalk La Mirada Unified School District, Norwalk, CA

Construction Manager. Project consists of major modernization to existing gymnasium expansion (30,000 sq. ft.) and two locker buildings renovation (14,000 sq. ft.) with campus wide ADA POT upgrades. Project upgrades consisted of Structural, PA, FA, Data, A/V, intrusion system, FS, new flooring, walls, HVAC etc.

Various Measure H Bond Program Project, Anaheim Union High School District, Anaheim, CA

Construction Manager for the District's \$249M Measure H bond for the new construction, reconstruction, modernization, and rehabilitation of the District's campus facilities. Managed, oversaw and coordinated all facets of design, pre-construction, construction and close-out phase of various multimillion-dollar projects, such as: Anaheim HS Aquatics Center Renovation (\$9M); Cypress HS (\$8.4M); Dale JHS (\$56.3M); District New Central Kitchen (\$18M); Katella HS DROPs Site Improvement (\$14M); and Kennedy HS (\$7.3M).



Construction Manager II, LAUSD 75 ADA Access Compliance, Various District-wide Projects, Los Angeles Unified School, Los Angeles, CA (\$20M)

- **Initiation:** Detailed Scope of Work Verification for ADA Access Compliance Criteria:
 - Path of Travel Slope & Cross Slope, Ramps, Accessible Gate, Drinking Fountain, Parking Area, Unisex Restroom, Site & Directional Signage, Exit/ID Signage, Door Hardware, Elevator, Student Restroom and Lockers.
- **Planning:** Site Verifications against Plans and Detailed Scope of Work. Documentation of possible impacts between existing site conditions and detailed scope of work. Elevate documents client/owner. Coordinate Joint Scope Site Meeting with all parties, Site administrator, inspection, architect, contractor and safety. Review contractor cost proposal against Detailed Scope of Work and construction Task Catalog, Unit of Measure, Item Description and Quantity. Prepare Owner Review Comments in Progen web-based software and transmit report to Owner/client. Review and Validate Construction Baseline Schedule, Prepare reconciliation meeting with contractor and owner procurement managers.
- **Execute:** Prepare and coordinate Job Start Meeting with Site administrators, Inspection, Contractor, OEHS, ATU and Architect.
- **Monitor and Control:** Contractor Construction Mobilization, Weekly Progress Meeting, QAQC inspection request with contractor, Process inspection request. Process application for payment, Validate As-builts / Redline updates, Process RFC's, Process Submittals, Validate Construction Baseline Schedule updates, Process Modification (if applicable).
- **Close-out:** Process DSA Form-6 with contractor and inspection, Contractor As-built signoff by inspections, process As-built documents to architect, Collect Spare Parts and transfer to M&O.

Construction Manager, Multiple District-wide Projects, Los Angeles Unified School District, Los Angeles, CA

List of Formal BID Projects:

- SRHS#9, LAUSD, 155,725 Square Feet, \$80M
- SRMS#3, LAUSD, 109,493 Square Feet, \$37M
- SRES#6, LAUSD, 74,125 Square Feet, \$35M
- SRES#2, LAUSD, 81,782 Square Feet, \$31M
- SRMS#6, LAUSD, 128,848 Square Feet, \$47M
- **Initiation:** Detailed Scope of Work Verification, Cost Estimate Verification, Project Manual Verification. Master Contract agreement, Deliverables, Milestones and BIM requirements. (Building Information modeling)
- **Planning:** Site Verifications against Plans and Detailed Scope of Work. Develop project budget and assign Vendor & Subcontractors purchase order from estimate. Coordinate with Power Utility Company for Temporary Power and set up owner facilities, Documentation of possible impacts between existing site conditions and detailed scope of work and present the Owner these issues, and Review and Validate Construction Baseline Schedule.
- **Execute:** Notice to Proceeds 2: Prepare and coordinate with Site administrators, Inspection, Contractor, OEHS, ATU and Architect.
- **Monitor and Control:** Contractor Construction Mobilization, Weekly Progress Meeting, QAQC inspection request with contractor, Process inspection request. Process application for payment, Validate As-builts / Redline updates, Process RFC's, process Submittals, Validate Construction Baseline Schedule updates, Process Change Orders (if applicable).
- **Close-out:** Process DSA Form-6 with contractor and inspection, Contractor As-built signoff by inspections, process As-built documents to architect, Collect Spare Parts and transfer to M&O.



Los Angeles Unified School District, District-wide Projects, Los Angeles, CA (Three Master JOC Contracts, \$10M each)

- **Initiation:** Detailed Scope of Work Verification for Fire Life Safety and ADA Access Compliance Criteria:
 - Path of Travel Slope & Cross Slope, Ramps, Accessible Gate, Drinking Fountain, Parking Area, Unisex Restroom, Site & Directional Signage, Exit/ID Signage, Door Hardware, Elevator, Student Restroom and Lockers.
 - Fire Alarm and Technology
- **Planning:** Site Verifications against Plans and Detailed Scope of Work. Documentation of possible impacts between existing site conditions and detailed scope of work. Elevate documents client/owner. Coordinate Joint Scope Site Meeting with all parties, Site administrator, inspection, architect, contractor and OEHS. Review contractor cost proposal against Detailed Scope of Work and construction Task Catalog, Unit of Measure, Item Description and Quantity. Review and Validate Construction Baseline Schedule. Prepare reconciliation meeting with contractor and owner procurement managers, Finalize cost Proposal.
- **Execute:** Prepare and coordinate Job Start Meeting with Site administrators, Inspection, Contractor, Sub-Contractor, OEHS, ATU and Architect.
- **Monitor and Control:** Contractor Construction Mobilization, Weekly Progress Meeting, QAQC inspection request with contractor, Process inspection request. Process application for payment, Validate As-builts / Redline updates, Process RFC's, Process Submittals, Validate Construction Baseline Schedule updates, Process Modification (if applicable).
- **Close-out:** Process DSA Form-6 with contractor and inspection, Contractor As-built signoff by inspections, process As-built documents to architect, Collect Spare Parts and transfer to M&O.

Sr. Construction Manager, Los Angeles Unified School District, District-wide Projects, Los Angeles, CA (Six Master JOC Contracts, \$10M each)

- **Initiation:** Detailed Scope of Work Verification for Fire Life Safety and ADA Access Compliance Criteria:
 - Path of Travel Slope & Cross Slope, Ramps, Accessible Gate, Drinking Fountain, Parking Area, Unisex Restroom, Site & Directional Signage, Exit/ID Signage, Door Hardware, Elevator, Student Restroom and Lockers.
 - Fire Alarm and Technology
- **Planning:** Site Verifications against Plans and Detailed Scope of Work. Documentation of possible impacts between existing site conditions and detailed scope of work. Elevate documents client/owner. Coordinate Joint Scope Site Meeting with all parties, Site administrator, inspection, architect, contractor and OEHS. Review contractor cost proposal against Detailed Scope of Work and construction Task Catalog, Unit of Measure, Item Description and Quantity. Review and Validate Construction Baseline Schedule. Prepare reconciliation meeting with contractor and owner procurement managers, Finalize cost Proposal.
- **Execute:** Prepare and coordinate Job Start Meeting with Site administrators, Inspection, Contractor, Sub-Contractor, OEHS, ATU and Architect.
- **Monitor and Control:** Contractor Construction Mobilization, Weekly Progress Meeting, QAQC inspection request with contractor, Process inspection request. Process application for payment, Validate As-builts / Redline updates, Process RFC's, Process Submittals, Validate Construction Baseline Schedule updates, Process Modification (if applicable).
- **Close-out:** Process DSA Form-6 with contractor and inspection, Contractor As-built signoff by inspections, process As-built documents to architect, Collect Spare Parts and transfer to M&O.

Dan Franco

Senior Construction Manager

Education

General Education Coursework,
California State University,
Fullerton, CA

Engineering & Technology
Studies, California State
Polytechnic University, Pomona,
CA

Certifications

General Contractor License B,
Contractor State License Board,
License No. 836684 (inactive)

Dan is a results-oriented construction management professional with more than 20 years of experience in planning and executing multimillion-dollar public works projects. As a licensed contractor, Dan has solid technical experience and strong understanding of various building components to identify risks, mitigate any potential issues, and ensure that projects are constructed in compliance with all building codes and regulatory requirements. He is known for his ability to develop partnerships and build positive rapport with architects, engineers, agency officials, third-party utilities, vendors, and owners—all while successfully executing projects within schedules and budgets.

Relevant Experience

Measure BB Bond Program, Hacienda La Puente Unified School District

As the Sr. Construction Manager for the District's Measure BB Phase I and II projects, Dan's responsibilities included:

- Preparing overall preliminary estimated budgets for the Districts \$148M Measure BB bond program projects.
- Collaborating with District Stakeholders to define 21st Century Classroom Modification scopes.
- Performing budget evaluations and detailed construction estimates for all projects within phases 3-9.
- Creating interactive budget spreadsheet for tracking estimates as they relate to true construction costs.
- Working with District to update division 00 specifications and define District Standards.
- Preparing updated contractor prequalification package to be utilized for bid procurement processes.
- Collaborating with District in dispute resolutions with vendors.

Various Districtwide Projects, Pomona Unified School District

Served as the the Sr. Construction Manager responsible for program and project level oversight and direction of project teams in support of the District's \$260M Measure PS and \$300M Measure P facilities bond projects. Responsibilities include:

- Executing the construction of the District's new construction, modernization, renovation, and additions projects from planning, programming, pre-construction, construction through occupancy and DSA closeout for the following projects:
 - Diamond Ranch High School, Campus Security
 - Diamond Ranch High School, Press Box Installations
 - District-wide Fire Alarm Upgrades
 - Ganesha High School, Track/Field Renovation
 - District-wide Gymnasium Access Controls Installations
 - District-wide LED Marquee Installations
 - District-wide Playfield Renovations
 - Lexington Elementary School, Site Improvements
 - Lexington Elementary School, Kitchen Remodel
 - Lorbeer Middle School, MEP Renovations
 - Pomona High School, Site Improvements
 - San Jose Academy Reconfiguration
 - Simons Middle School, Field Renovation
- Collaborating and coordinating with District administration, design team, DSA, site staff and personnel to develop plan for site expansion and reconfiguration.



Roosevelt Elementary School Expansion and Modernization (\$45M), Pomona Unified School District

- Developed procurement schedule for implementing construction of a two-story concrete building totaling approximately 30,000 SF and modernizing the existing masonry building totaling approximately 33,000 SF.
- Performed oversight of on-site construction activities for concrete two-story building, construction of new parking lot and bus turn-around.

Washington Elementary School Expansion and Modernization (\$43M), Pomona Unified School District

- Developed procurement schedule for implementing construction phasing for 16 classroom interim campus, two-story concrete buildings totaling approximately 30,000 SF and modernizing the existing masonry building, totaling approximately 20,000 SF.
- Performed oversight of construction of interim campus, two-story building, construction, modernization of existing masonry and brick building, new parking lot, and bus turn around, which also included new playgrounds, shade structures and field areas.
- Implemented formal training through equipment manufacturers for lighting control systems, HVAC systems, and integrated communication system.

Rancho Viejo Middle School, Site Development, Hemet Unified School District

- Completed 30-acre site development of Rancho Viejo Middle School, which included field engineered soccer and baseball field area to establish positive drainage as a result of existing topography being at a much higher elevation than the plans showed; regraded to avoid the cost of a large amount of export.

Hope for Home Emergency Shelter, City of Pomona

- Performed Construction Management oversight for the development and construction of the design-build Emergency Shelter Facility Project.
- Collaborated with City Stakeholders on planning and execution of additional parking lot to support increased staffing needs.
- Worked with VOA and City stakeholders to define and implement increased security measures.
- Performed all necessary closeout procedures and coordinated proper commissioning of facility.

Kurt Supinger, PE

Senior Construction Manager

Education

B.S., Civil Engineering, Michigan State University

A.A., Administration of Justice, Antelope Valley College

Certifications

Professional Engineer
California, #C50488

Lean Six Sigma Quality Certification

Software

Microsoft Office Suite
Primavera
Prolance

Kurt has over 34 years of experience in the construction industry, with more than 23 years of specific K-14 and higher education experience regarding modernization and new construction in California. He has been accountable for administration of projects from scope development through punch list completion, focusing on timely communication with site staff, project team and owner personnel. He has vast experience tracking field paperwork, solving issues, and providing analysis of potential claims, options to schedule delays and cost containment through negotiation and documentation. Kurt also demonstrates servant leadership, executive presence, and a partnership philosophy.

Relevant Experience

Captain Leland F. Norton Elementary School, San Bernardino City Unified School District, San Bernardino, CA (\$14.9M)

Kurt served as the Construction Manager for the construction of the LEED certified, Captain Leland Norton Elementary School.

- Duties ranged from scope development through project certification including development and maintenance of budgets, focusing on the bid process, oversight of the construction phase and ensuring as-builts and extra materials were accounted for.
- Project included demo of housing, grading and construction on a 13-acre site of a 59,000 SF school with 36 total classrooms (800 students), Multi-purpose, Library and Admin Buildings.

Facilities School Repair Program, San Bernardino City Unified School District, San Bernardino, CA (\$3.7M)

Kurt served as the Construction Manager for the modernization of 4 School Sites. The project refurbished existing buildings at year-round schools with no interim housing.

- Overall responsibility of projects cradle to grave. Duties range from scope development through project certification including development and maintenance of budgets, focusing the bid process, oversight of the construction phase and ensuring as-builts and extra materials are accounted for.
- Day-to-Day management of \$78.3M in Grant Money including 1 new elementary school, 9 modernizations and several follow-on projects.

Correia Junior High School/Dewey Elementary School Modernization, San Diego Unified School District, San Diego, CA (\$5.5M)

Kurt served as the Construction Manager and was responsible for Modernization and New Facilities at two School Sites. The project built new free-standing Libraries and refurbished existing buildings.

Bond School Repair Program, San Diego Unified School District, San Diego, CA (\$38.5M)

As the Sr. Construction Manager, chief duties included oversight of 5 Construction Managers (CM) and 12 DSA Inspectors, delegation and follow-up. Review of Change Orders, management and field reports, database log content and general training. Kurt represented Construction Department in management meetings and process reviews. Accountable for operational supervision of CM and Inspectors on projects totaling \$38.5M of modernization contracts on 12 sites. The project had a total value of \$137.7M for 5 new school sites.

- Responsible for administration of General Contractor's contract from NTP through Punch list completion.



- Primary tasks include processing Contractor Pay Requests, maintaining RFI, Submittal and Change Order Logs, chairman of Weekly Progress Meetings and generation of meeting minutes.
- Provide analysis of potential claims, schedule delays and cost containment.
- Contracts assigned/completed include 19 Contracts for \$76.5M over 15 sites.

Bond School Repair Program, Los Angeles Unified School District Los Angeles, CA (\$123M)

- Office management of \$123M worth of school repair projects covering 108 schools and involving 1,500 individual projects.
- Responsible for office Change Control function for all projects including database development, quality assurance of data entry and review of change order documentation.

Utility and Tenant Improvement Projects, Pepperdine University, Malibu, CA (\$38M)

Kurt served as the Project/Construction Manager for Utility Installation and tenant improvement projects at Pepperdine University. Kurt used GMP and stipulated sum contracting to implement a Chilled Water Loop and tenant improvement projects in student housing and the Caruso School of Law. Kurt developed project scopes and budgets, selected designers/contractors, analyzed schedules and cost estimates and managed stake holder coordination and communication.

Pierce College, Los Angeles Community College District, Los Angeles, CA (\$24M)

Kurt served as the Construction Manager for the modernization of seven 1960 era classroom, administrative and Multi-Purpose buildings, and associated site work totaling 85,613 SF. Scope of work included:

- Overall responsibility from bid award through occupancy and punch list including all duties from Budget Maintenance to solving field issues to negotiating Change Orders and reporting statuses.
- Managed information flow among dispersed Project Team of Program Managers, Inspectors, Contractor, Architect, Labs, Hazmat Consultants and College Personnel.

Raymund Hillis

Construction Manager

Education

B.S., Construction Management,
California State University,
Long Beach, CA

Software

Microsoft Office Suite
Expedition
Procure
Primavera

Ray has over 30 years of construction engineering and management experience. He has an outstanding work history in Southern California with a strong focus on multi-million-dollar educational facilities, K-12, community colleges, and university projects. His professional experience includes new construction and renovations, and with his robust educational facility experience, he is very knowledgeable and experienced in working with DSA to successfully deliver projects. In addition to his educational sector experience, Ray has a diverse project portfolio that includes projects in the sectors of commercial, refinery, light, heavy rail and station transit projects, healthcare, and defense.

Education sector clients include Garden Grove Unified School District, Santa Ana Unified School District, Los Angeles School District, and Coast Community College District, University of Southern California, and California State University, Long Beach.

Relevant Project Experience

Theodore Roosevelt Elementary School Reconstruction Project, Anaheim Elementary School District (\$45M)

Managed the construction of the Lease-Leaseback Roosevelt Elementary School project. The project includes the construction of new classroom buildings, construction of administration offices, and other support facilities; construction of new parking lots, student loading areas, and associated on- and off-site work.

Clinton and Warren Elementary School, HVAC Modernization (\$7.8M), Garden Grove Unified School District

Management of on-site Contractors for the installation of new HVAC units for all classrooms, multi-purpose rooms, and administration building. Scope included retrofitting new windows, ceilings, walls and upgrading the electrical, fire and intrusion alarm systems.

Pacifica High School Seismic Project (\$45M), Garden Grove Unified School District

Managed the Contractor for the demolition of two (2) classroom buildings, two (2) theaters, a cafeteria, and a library and the construction of six (6) new classroom buildings, (including a science building) a new theater, a new cafeteria and a new library. Total added square footage of 102,000.

Automotive Modification (\$2.4M), Diane Watson Career Training Center, Los Angeles Unified School District

- Managed the Contractor on the modification to an existing automotive repair facility.
- Reviewed contractor bids and provided recommendations to the Owner.
- Reviewed and approved the schedule of values.
- Monitored construction progress and reviewed all requests for information, construction change requests, and potential change order requests (PCORs). Analyzed and negotiated all PCORs and prepared and issued change orders to the contractor.
- Maintained and updated the change order log for the owner's review.
- Reviewed and approved the contractor's monthly progress billings.
- Conducted and issued Contractor punch list walk through.



Kitchen Expansion Project (\$3.8M) Elizabeth Learning Center, Los Angeles Unified School District

- Managed the Contractor on a Kitchen Expansion Project for the Elizabeth Learning Center.
- Reviewed contractor bids and provided recommendations to the Owner.
- Reviewed and approved the schedule of values and base line schedule. Monitored construction progress and reviewed all requests for information, construction change requests, and potential change order requests (CORs). Analyzed and negotiated all CORs.
- Prepared and issued change orders to the Contractor.
- Maintained and updated the change order log for the Owner's review.
- Photographed all aspects of the Project, on a daily basis.
- Reviewed and approved the Contractor's monthly progress billings.

Hector Godinez Fundamental High School (\$64M) & Heroes Elementary School (\$14M), Santa Ana Unified School District

- Provided construction management and oversight on a new multi-story high school and elementary school project.
- Reviewed contractor bids and alternates and provided recommendations to the owner.
- Reviewed and approved the baseline schedule, schedule of values and value engineering requests with the final input from the owner.
- Participated and prepared minutes from weekly construction meetings.
- Reviewed all RFIs, change requests, and potential change orders. Analyzed and negotiated all PCOs and issued change orders.
- Maintained and updated the change order log for the owner's review.
- Photographed all aspects of the project on a weekly basis.
- Reviewed and approved contractor monthly progress billings.
- Reviewed contractor claims, prepared written analysis to support owners' position, attended mediation and arbitration claim resolution meetings.
- Conducted contractor punch list walk through.
- Performed project closeout procedures.

New and Retrofit HVAC Projects, Los Angeles Unified School District

- Managed multiple contractors working on HVAC retrofit projects.
- Reviewed design packages and prepared requests for proposals.
- Prepared bid documents and reviewed Contractor bids.
- Issued Notices to Proceed and prepared project manuals.
- Reviewed Contractor schedule of values and baseline schedule.
- Monitored construction progress.
- Reviewed and submitted Contractor monthly invoices to the Owner. Negotiated and prepared Contractor change orders. Performed project closeout activities.

New Intrusion, Alarm, Public Address and Computer Systems Projects, Los Angeles Unified School District

- Managed multiple contractors working on new intrusion, alarm, PA and computer system projects.
- Analyzed design packages with engineer and prepared bid packages. Reviewed Contractor bids and awarded contracts.
- Reviewed contractor schedule of values and baseline schedules.
- Monitored construction progress.
- Reviewed and submitted Contractor monthly invoices to the Owner. Negotiated and prepared Contractor change orders.
- Performed project closeout activities.

Joel Shrader, PMP, LEED AP

Construction Manager

Education

Master of Business
Administration (MBA), California
State University, Long Beach, CA

B.S., Electrical Engineering,
California State University,
Long Beach, CA

Licenses & Certifications

Project Management
Professional (PMP), Project
Management Institute

LEED AP, U.S. Green Building
Council

Software

Microsoft Office
Microsoft Project
AutoCAD

Joel is a construction and project management professional with over twenty (20) years of experience supporting multimillion dollar educational facility projects. As a PMP and LEED AP certified professional, Joel has previously supported K-12 and K-14 educational sector clients, where he was responsible for the successful management, oversight, and delivery of large and complex projects. Most notably, Joel served on the bond program for Los Angeles Unified School District for approximately ten (10) years and is well versed with K-12 procedures and processes, including successfully achieving DSA approval on over 100+ projects.

Relevant Project Experience

Reconstruction and Modernization of Sunkist Elementary School, Anaheim Elementary School District

- Served as the Project Manager for the Sunkist Elementary School project, valued at \$39,266,000.
- Responsible for the construction oversight of the state-of-the art facility consists of a new two-story building with 41 teaching stations which will replace the existing outdated buildings. This design-bid-build project includes both modernization and new construction of a K-6 elementary school on a 9.64-acre site in Anaheim, CA.
- Managed the scope, which included the construction of two new buildings, modernization of two (2) existing buildings; new site work with accessible parking, playfields, hardscape, landscape, underground utilities, path of travel, and lighting; and new masonry trash enclosure.
- Supervision of on-site construction to assess performance of the construction team including IOR and DSA approved LOR regarding adherence to contract requirements.
- Ensuring to provide consistency in cost and schedule performance by validating the required IOR and LOR inspections, dailies, and T&M tickets on the projects.

Gauer and Stoddard Elementary School, Classroom and Site Improvements, Anaheim Elementary School District

- Managed the project which included clearing and grubbing area for installation of four (4) modular buildings at each site (Gauer and Stoddard); excavating and compacting subgrade as needed; poured concrete foundations; craned buildings into place and connected buildings to existing utilities, including: water, sewer, electrical, fire alarm and low voltage systems. In addition, a new fire-hydrant was installed; hot-tapped into city water supply, installed double check valves, and certified the installation; ADA improvements to existing bathrooms and new ADA paths of travel.
- Managed owner's weekly construction development meeting minutes, contractors and IOR dailies, IR request and project monthly construction schedule update, cost tracking and construction progress report to the client.

Ross and Loara Elementary School – Classrooms, Single Point of Entry, New Parking Lot and New Playground, Anaheim Elementary School District

- Managed the project which consisted of a new playground and sod field at Loara Elementary School, installation of nine (9) modular classrooms at Ross Elementary School in addition to the creation of a single point of entry, new parking lot, and new playground.
- The Loara ES project consisted of demolition of old playground equipment and installation of new playground at new location. Restored irrigation system and placed over 15,000 square feet of sod.



- The Ross ES project consisted of demolition of existing playground and adjacent field and construction of a new 56-car ADA compliant parking lot and connecting ramps and flatwork; creation of single point of entry to school by modifying ADA path of travel and installing multiple accessible ramps; cleared, grubbed, compacted and placed asphalt concrete for placement of 9 modular classrooms; construction of a new playground and running track

Various District-wide Projects, Los Angeles Unified School District

- Managed, coordinated and responsible for all aspects of project execution including bid preparation, pre-bid coordination, project controls, contract solicitation, pre-bid meetings, job-start activities, construction management, job-site coordination, safety, inspection scheduling, contract management and administrative close-out.
- Managed operations within the Fire Alarm Execution Group, specializing in fire life safety projects.
- Managed FEMA suspended ceiling hazard mitigation projects at various sites throughout LAUSD, including sensitive historic auditorium ceilings, totaling over \$5.5 million in scope.
- Managed a staff of 24 professionals and a budget more than \$180 million in active construction projects.
- Substantially completed 116 DSA Approved Fire Alarm (FLS) projects within 15 months; a construction value of \$98.2 million.
- Provided senior management support including senior management review and contractor partnering meetings.
- Management and oversight of IOR and LOR activities and contractual obligations.
- Concurrently managed all aspects of 10 active fire alarm modernization projects as an Owner Authorized Representative; contract value \$10.8M.
- Managed the construction of the replacement of outside air handler project and upgrade of chilled water plant project at the LAUSD HQ "Beaudry" Building, including the modernization of central plant controls and equipment.
- Directed school modernization projects, including mechanical upgrade projects, fire alarm upgrade projects, and asbestos abatement projects at District facilities.

Pierce College – John Shepard Stadium, North of Mall Renovations and New University Library, Los Angeles Community College District

- Responsible for the completion of the new John Shepard Stadium and the North of Mall Renovation projects; a combined value more than \$70 million dollars and over 250,000 man-hours of labor.
- In addition, Joel managed the construction of the new University Library, a new construction design-build LEED Silver Certified Project; a \$40 million dollar project.
- Managed, coordinated and responsible for all aspects of project execution including bid preparation, pre-bid coordination, project controls, contract solicitation, pre-bid meetings, job-start activities, construction management, job-site coordination, safety, inspection scheduling, contract management and administrative close-out.
- Provided information and reporting to senior management, the end users, and District Board Members as required.
- Provide management and monitoring of LOR being charged on invoices and any absences or duplications of LOR inspectors on-site.
- Oversight of report submission to IOR and monitoring of the DSA box.
- Managed a staff which included Project Engineers, Budget and Cost Estimators, and Assistant Project Managers.

Dale Frisby

Construction Manager

Education

MBA, Management, Texas A&M University, College Station, TX

Bachelor of Environmental Design, Architecture, Texas A&M University, College Station, TX

Affiliations

Division of the State Architect Advisory Board – past State Contractors Representative

Coalition for Adequate School Housing – past Conference Planning Committee, Panelist

Construction Management Association of America – past Member, Panelist

American Institute of Architects – past Professional Affiliate, Panelist

Software

Microsoft Project
Microsoft Office
Primavera P6
Prolog

Mr. Frisby has 30+ years of expertise in managing the planning, feasibility, design, estimating, constructability, bidding, procurement and execution of major programs and project teams. He has specialized as an education and public works market leader. Mr. Frisby commands a working knowledge of the various contractual delivery methods and a thorough understanding of public contracting procedures and requirements, including DSA. He has supervised multiple direct reports and oversaw an operational team of 35+. He has managed at the program level and has also managed projects exceeding \$100M+. Mr. Frisby spent 5 years consulting in the public works space and 2 years with statewide programs.

Relevant Project Experience

Los Angeles Unified School District, Various Districtwide Projects, Los Angeles, CA
Serving as a Project Manager assigned to LAUSD for the execution of the bond and state funded construction program as an Owners Authorized Representative on several operational campuses.

- LAUSD, Bancroft MS HVAC Replacement (\$7M)
- LAUSD, Menlo ES HVAC Replacement (\$5M)
- LAUSD, Webster MS DROPS Site Improvements (\$4M)
- Manage all facets of preconstruction, bid, award, construction and close out of projects.
- Plan, organize and prepare reports to upper management on the project's status.
- Manage the project budget and schedule to meet the District requirements, negotiating change orders, processing payments assuring compliance with district procedures.
- Manage and document the daily activities of the contractor, reviewing submittals, evaluating requests for clarification, issuing construction directives, coordinating inspection agencies and the design professionals.
- Coordinate the procurement, delivery and installation of Owner furnished and FF&E.
- Administer the provisions of the District General Conditions, construction, vendor, and professional service agreements.
- Integrate the project activities into the various District, policies, and procedures.

San Jacinto Unified School District, Various Districtwide Projects (\$90M), San Jacinto, CA

Two (2) new elementary schools and one (1) new middle school on suburban sites. Projects involved extensive entitlement, planning and offsite/utility issues. Worked closely with the District and Agencies while overseeing onsite construction from reconstruction through close out.

Glendale Unified School District, Various Districtwide Projects (\$180M), Glendale, CA
Oversaw multiple project teams, maintaining Owner relations and interface with agencies from planning, reconstruction through close out.

- \$50M Measure M modernizations to over 25 operational schools in various locations throughout the District.
- \$45M Crescenta Valley High School, 6 free standing structures, over 12 modernizations, new modular village, and extensive site reconstruction.
- \$28M Toll Middle School/Keppel Elementary 12 building modernization and seismic retrofit with extensive site reconstruction to existing operational campus.
- \$25M Edison School/Pacific Park elementary school, city park and library joint use project with 9 new structures and a wide range of site and recreational uses.



- Assumed full management responsibility for all technical, administrative, financial and operational aspects of the contract as well as the integration into the clients organization, policies and procedures.
- Re-evaluated and re-prioritized the master schedule for an occupied complex high school campus reconstruction to save 33% in construction time.
- Completed all 25 sites construction and modernization with less than 7% in change orders, all opening on time for school as planned.
- Collaborated with over 12 Architects and numerous other design professionals.

New Life Science Classroom Building (\$13M), El Camino College, Torrance, CA

Oversaw modernization of the existing science building, bringing it up to current environmental, health, and safety standards, and new life sciences classroom and lecture facility.

North Orange County Community College District, Various Districtwide New Construction and Modernization Projects (\$175M), Fullerton College

Oversaw Owner/OAR relations, program implementation and onsite operations, campus interface from planning through close out. Projects consisted of fifteen (15) new ground up structures, twelve (12) modernization projects, multiple mini-central plants and campus wide site development on an established operating campus. Notable Projects included:

- \$20M Learning Resource Center
- \$19M Student Services Center
- \$18M Classroom / Office Building
- \$15M 3-story Parking Structure
- \$8M Quad area reconfiguration and campus wide site improvements
- \$34M Science Classroom/Lab Building
- \$12M Industrial Arts, Technology and Engineering Complex
- \$25M Gymnasium with Aquatics and PE Building renovations
- \$10M Field House and Athletic Fields
- \$4M Cosmetology modernization
- \$1M Child Development Center
- \$5M Historical Wilshire Theatre renovation

North Orange County Community College District, Various Districtwide New Construction and Modernization Projects (\$75M), Cypress Community College

Oversaw the assumption of an ongoing program, Owner/OAR relations and onsite operations for construction through close out. Projects included four (4) new ground up structures, six (6) modernizations, central plant, campus wide site reconstruction on an established operating campus. Notable projects included:

- \$ 20M Learning Resource Center completion
- \$ 17M Student Services Center completion
- \$ 10M Bookstore
- \$ 12M Quad area reconfiguration and campus wide site improvements completion

North Orange County Community College District, Various Districtwide Projects, Cypress Community College – Anaheim Campus (\$30M)

- Served numerous unique administrations and user groups, utilized several Project Management teams and support staff to implement the design, procurement, construction, close-out and occupancy of a wide variety of projects.
- Integrated the implementation practices and data base management system into District mode of operations integrating information exchange and communication while administering the ongoing activities of an active capital improvement program.
- Projects included: District administration and Board Room, records, registration, shipping - receiving, classrooms, culinary school and subletting space to other higher ed concerns. (PX supporting an onsite PM team using CM Multiple Prime).
- Converted a 12-story pre-OSHPOD functioning Hospital into a DSA compliant Community College education facility with seismic retrofit from footings to roof and site including ancillary improvements.



Pasadena Community College District, Pasadena City College, Gymnasium, Football Stadium, Maintenance Facility, Aquatics, and Secondary Effects (\$30M)

- Turned a 30% over budget, state funded, DSA approved, low bid project into a successful redesigned, re-entitled CM Multiple Prime solution delivered on time and under budget. (First Multiple Prime Contract delivery allowed by DOF and Chancellors Office)
- Facilitated modifications to 3 existing DSA approvals with different AORs through value engineering, design, entitlements, procurement, construction and close out.
- Initiated formal partnering sessions, community outreach/local participation programs and neighborhood activist workshops to mitigate area stakeholders concerns.

City of Rancho Cucamonga, Public Works Services Center & Household Hazardous Waste Facility, (\$14M)

- Assisted Owners in building design, entitlement, construction and operational matters to create and implement building programs
- On site Owners Representative for the Rancho Cucamonga Redevelopment Agency projects during construction
- Reviewed contractors progress, processing submittals, RFIs, payments and change orders.
- Monitored and reported on progress of site SWPPP, Safety and Quality programs.
- Facilitated regular progress meetings, interaction with city departments and other agencies making presentations and reporting to stakeholders on the projects progress.

City of Rancho Cucamonga, Victoria Gardens Cultural Center (\$35M)

Home to the Lewis Family Playhouse a 536-seat performing arts venue with black box theatre and ancillary facilities, The Paul Biane Library, and Celebration Hall a multi-purpose events center with kitchen facilities. The complex has a one-acre courtyard and is flanked by two 3-story parking structures.

- Project Manager for on-site construction team using CM Multiple Prime construction delivery
- Design assist, BIM modeling and full preconstruction services for this LEED designed facility
- Facilitated interactions with Mall Developer, Redevelopment Agency and Building User Groups
- Complex reporting and compliance requirements for 8 different funding sources public & private

Louis Ramos, CCM, LEED AP BD+C

Construction Manager

Education

B.S., Electronics and Computer Engineering, California State Polytechnic University, Pomona

Master of Business Administration, Azusa Pacific University

Certificate, Construction Management, University of California, Riverside

Certificate, Facilities Management, University of California, Riverside

Certifications

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

LEED Accredited Professional, Building, Design, and Construction (LEED AP BD+C), (LEED AP BD+C), U.S. Green Building Council

OSHA 10, Occupational Safety and Health Administration, US Department of Labor

Louis has 20 years of experience in the construction industry, where he has served in various program, project, and construction management roles, responsible for the management and oversight of multimillion-dollar capital improvement projects on behalf of K-12 school district and community college. Louis is well-versed with public contracting code, as well as DSA, OPSC, CDE, and DTSC requirements and his education sector experience has included the management and oversight of new construction, modernization, renovation, additions, site infrastructure and underground utilities, and HVAC, ADA, seismic upgrades, among several others—utilizing various alternative delivery methods such as design-bid-build, design-build, job order contracting, and lease-leaseback. Throughout his career, Louis has managed over \$180M worth of projects ranging in pre-construction, construction, and close-out for various complex modernization projects at various stages from scoping, design, construction, and post construction activities.

Relevant Project Experience – Education Sector

La Mirada HS Gymnasium Expansion, Norwalk La Mirada Unified School District

- Responsible for managing the implementation of the \$375 million measure G bond program for NLMUSD Bond Project at La Mirada H.S. major modernization to existing gymnasium expansion (30,000 sq. ft.) and two locker buildings renovation (14,000 sq. ft.) with campus wide ADA POT upgrades. Project upgrades consisted of the following but not limited to: Structural, PA, FA, Data, A/V, intrusion system, FS, new flooring, walls, HVAC, lighting, roof, casework, etc.). Providing project/construction management services for the District during the construction & close-out phase. Total project construction cost: \$17 million.
- Reviewed and processed project schedules, schedule updates, analyzed delays, RFIs, submittals, payment applications, and worked with the contractors, district vendors on coordinating project matters and PMO team for project time extensions (Compensable and non-compensable), conducted weekly Owner/Architect/Contractor meetings. Providing daily reports to the District/PMO on project progress. Managed the negotiation and settlement of change orders, claims, and participated in dispute resolution meetings. The main point of contact for the project progress for the District/PMO/Contractor/A/E/IOR.

Phase I & Phase II Projects, Hacienda La Puente Unified School District

- Provided complete turnkey program and construction project management services for the District's Measure BB bond program for the 21st Century Classroom Improvements program, which consists of Phases I & II for eight (8) school sites which include three (3) elementary and five (5) middle schools.
- The Measure BB Bond Phases I & II has a budget of \$32M to manage and construct modernizations for the existing school sites and improvements consist of upgrading entire interior of school classrooms which include but not limited to removing and replacing walls, ceiling, lighting, floors, new classroom technology improvements (new 86" monitor, power upgrades, data network upgrades, fire alarm upgrades, PA upgrades, POT upgrades, etc.) and new classroom furniture.
- The District's BB bond program has 35 school sites and with a projected overall budget of \$170 million to complete all nine (9) phases.
- Manage, oversee, and coordinate all facets of the pre-construction, bid and award, construction, and close-out phase of all assigned projects.
- Review pre-construction documents and submits comments to Designer, as necessary.
- Plan, organize, and prepare reports to upper management with respect to the status and/or progress of the projects.
- Coordinate with all pertinent public agencies during pre-construction/construction to comply with all on-site work; coordinate with various District and project staff.



- Manage both the project budget and schedule to meet the District's qualitative standards; monitors the project budget on a monthly basis and ensures that the budget accurately reflects the project status/progress.
- Manage daily activities of the contractor, reviews contractors' construction schedules and submittals, and coordinates responses to the contractors' inquiries.
- Receive, review, and negotiate Contractor Change Order Proposal(s) to achieve a fair & reasonable price in accordance with the General Conditions; review and address all Schedule impacts in accordance with the project specifications in a timely manner.
- Review the process and monitors payments for the contractor, architects, engineers, and any other pertinent parties.
- Monitor and manage project close-out with respect to project certification with DSA and project financial close out.

Canyon High School, New STEM Building, Orange Unified School District (\$38.5M)

- Provided construction management and oversight for a new two (2) story STEM building with a total gross area of 55,912 SF, which includes conversion of existing Administration Building into a Food Service and Kitchen, with a total gross floor area of 6,938 SF for the OUSD.
- Responsibilities include financial project status reviews, project risk assessments, and serving as the main point of contact between senior management and field teams.
- Manage the preparation of various design construction documents (CEQA/Cal-OSHA/DOSH/SCAQMD).
- Performed budget and cost control analysis, safety and compliance management, contract administration/negotiation, critical path/schedule management, and project constructability reviews.

Construction and Renovation Program, Los Angeles Unified School District (\$27B)

- Managed, oversaw, and coordinated all facets of the construction phase of various school facility projects, including mobilization, construction, and closeout, under the District's \$27B construction program, for the following key projects:
 - 10th Street Elementary School, HVAC Replacement (\$7.1M)
 - Eagle Rock High School, Auditorium Renovation/ADA (\$4.5M)
 - Eagle Rock High School, Small Learning Communities (\$2.8M)
 - Griffith Middle School, Critical Repair HVAC (\$6.2M)
 - LACES Magnet School, New Science Laboratory (\$3.3M)
- Planned, organized, directed, and reported project management activities and progress to upper management.
- Coordinated with all pertinent public agencies during construction to comply with all off-site work.
- Managed both the project budget and schedule to meet the District's qualitative standards.
- Performed day-to-day contract administration including providing various reporting, conducting bid analysis, coordinating pre-construction meetings and related award coordinating activities.
- Reviewed contractor construction schedules, submittals, schedule of values, and responded to contractor inquiries.
- Managed and coordinated project team, District staff, and contractors in communicating directives and ensure the project scope is built according to plans, specifications, and budget.
- Negotiated contractor change orders for a fair and reasonable cost.
- Reviewed and processed applications for payment and perform fiscal management of project resources.
- Administered provisions of Professional Service Agreements between architects and the District.
- Coordinated District delivery of related fixtures, furniture, and equipment.



Modernization and Repair Program, Los Angeles Unified School District (\$7.6B)

- Responsible for managing several modernization projects ranging in the multi-millions (Safety and Technology/Electrical Upgrades/CCTV/HVAC/Fire Alarm Upgrade/Repaving/Office conversions and modernizations), such as the following projects:
 - Belvedere Middle School, Auditorium Renovation (\$2.6M)
 - Carver Middle School, Synthetic Turf Soccer Field, Lighting RR Building, and ADA (\$2.8M)
 - Eagle Rock High School, Restroom Replacement and ADA (\$800K)
 - Hamilton High School, Air Conditioning and Fire Alarm Upgrades (\$11.8M)
 - Marshall High School, Track and Field Expansion (\$4.9M)
- Utilized “Expedition” & “Progen” programs for document control and contract change related material (submittals/transmittals/Request for Clarifications, Request for Proposals, Change Order Proposals, Change Orders).
- Performed daily contract administration, coordinating pre-construction conferences, reviewing of contractor’s initial construction schedule and updates, schedule of values, submittals, and general response to contractor’s questions regarding project contract administration.
- Managed various data reports in “Expedition” construction management software database to keep current. (i.e. change document reports).
- Responsible for managing contract change documents, generating, developing, and negotiating and tracking to report to senior management.
- Conducted various construction meetings at various project sites with Contractors/Engineers/Architects and local school administration/staff.
- Responsible for design, construction, and post construction management of activities.
- Responsible for managing staff and contractors to ensure project scopes as awarded and built in full conformance per the construction documents, schedule, and budget.
- Accountable for the planning, organizing, directing, coordinating, and reporting to the regional project management activities for specific modernization projects to existing facilities services.
- Performed other contract related CM/PM functions as requested by the regional director and senior project management personnel.
- Responsible for managing contractors/engineers/consultants and architects progress payments and financial reports per contract requirements.
- Responsible for procurement/developing scope of work and managing Job Order Contracting (JOC) for new projects.

Various Energy Upgrades and Renewable Programs, Various Districts via OpTerra Energy Services/ENGIE

- Performed management, oversight, and coordination for energy projects (ESCO) from development to the construction phase of educational facilities projects, which consisted of the following projects:
 - Audubon Middle School, Energy Efficiency Measures (\$3M)
 - Cochran Middle School, Energy Efficiency Measures Upgrades (\$2.2M)
 - El Camino Charter High School, Sitewide Lighting Energy Upgrades (\$1.5M)
 - Garfield High School, Energy Efficiency Measures Upgrades (\$4M)
 - South Gate High School, Energy Efficiency Measures (\$2.4M)
 - Washington Prep High School, Energy Efficiency Measures (\$2.7M)

New Health Center and Concessions Building, Irvine Valley College (\$7.5M)

- Provided construction project management services for Irvine Valley College on the new 4,687 SF Health Center and Concessions building, which include the new construction of a 594-stall parking lot (594 with various site upgrades to campus).
- Managed project pre-construction, construction, closeout, and certification process through DSA.

Elva Bravo

Project Engineer

Education

B.S., Construction Engineering Management, California State University, Long Beach, CA

Languages

Spanish
English

Elva has over 14 years of experience in construction administration and management for new construction, modernization and tenant improvement projects for K-12 and higher education clients. Her responsibilities have included ensuring the development, maintenance, and enforcement of a project site logistics plan and temporary facilities plan. She is competent at ensuring a complete and accurate set of contract documents including all the current contract changes and clarifications, and a complete set of as-built are available at the field location.

Relevant Professional Experience – Education

Roosevelt and Sunkist Elementary Schools Reconstruction and Modernization Upgrades, Anaheim Elementary School District

- Served as the Project Engineer supporting New Construction of two-story Braced Framed Steel System fully sprinklered classroom building, Modernization of two existing buildings including ADA upgrades and complete renovation of student and staff restrooms for the following projects:
 - Roosevelt Elementary School (\$44M)
 - Sunkist Elementary School (\$39M)
- Projects include Audio/Visual and Technology upgrades, which are complete sound, lighting, and stage equipment in MPR and Courtyard area. Classrooms are equipped with Front Row AV Systems, Tactile Boards and Promethean Interactive Display Panels. New Fire and Intrusion Alarms, Infrastructure for upcoming security camera system.
- Responsible for maintaining project logs, including contractors Contingencies and Allowances, construction progress and coordination with District Personal and outside vendors.
- Assisted with Change Order Proposal review, recommendations, and negotiations.

Burcham Elementary School and Keller Middle School HVAC Upgrades and Modernization, Long Beach Unified School District

- Served as the Project Engineer supporting HVAC, technology, and ADA upgrade projects, including management of scope, schedule and budget, and for overall onsite project management for the following projects:
 - Burcham Elementary School HVAC (\$8.6M)
 - Keller Middle School HVAC (\$7.6M)
- Projects included lease-leaseback delivery project type and projects consisted of the installation of a new sophisticated VRF system in classrooms, offices and support spaces including, but not limited to, HVAC system installation, utility infrastructure upgrades, accessibility upgrades, fire alarm upgrades, overhead projectors and other technological upgrades, ceiling repairs, and interior lights.
- Responsible for the documentation of construction progress, daily project reports, photographs and added scope of work.
- Conducted field walks to determine compliance with the plans and specifications.
- Maintained tracking logs, reviewed and tracked status of RFIs, submittals, CORs and change directives.
- Prepared meeting minutes, ad-hoc reports, and project-related correspondence.
- Assisted with the management of daily activities of contractors, reviewed contractor's construction schedules and submittals, and coordinated responses to contractors' inquiries through RFCs and other related documents.
- Coordinated with all pertinent public agencies during pre-construction and construction to comply with all off-site work; coordinated with various district and project staff.



Financial Aid Relocation, Information Technology Building, Core Performance Center and AET & KCRW, Santa Monica Community College District

- Served as Project Engineer for various multi-million-dollar projects:
 - AET & KCRW Radio Station (\$60M)
 - Central Plant Installation Concurrent w/ Health & Phy Ed
 - Financial Aid Relocation (\$1.7M) Summer 2014
 - Health & Physical Education Building (\$40M) Summer 2015
 - Information Technology Building (\$12.5M) Fall 2013
- Oversight and documentation of the daily operations of various construction sites, which included the preparation of activity reports showing daily progress of project(s).
- Coordinated efforts between the Owner, Contractor, Consultants and Inspection staff.
- Reviewed and processed submittals, requests for information, change order proposals, inspections, and payment applications in a timely manner.

North High School Modernization and Renovation, Torrance Unified School District

- Managed and documented daily project activities for various modernization projects valued at \$10M+ at North High School, which included electrical, mechanical, fire alarm upgrades, new restrooms renovations and new SCE service.
- Coordinated with Architect, Contractor and Owner to resolve design and construction issues.
- Evaluated and monitored contractor construction schedule and schedule of values.
- Reviewed, logged and distributed contract documents, RFIs, Submittals and CCDs.
- Maintained construction records, generated monthly progress reports, tracked project budget and made recommendations regarding budget encumbrances.
- Assisted in the review and negotiation of contractor pay applications and change orders.
- Ensured that test and inspections were performed and documented according to approved procedures.

Various Districtwide Portable Replacement Projects, Torrance Unified School District

- Responsible for the coordination of portable classroom replacements on-site and interfacing with the modular vendor, on-site administrators, and local third-party agencies, i.e. utilities.
- Performed project closeout activities, such as the development of the punch-list, coordinating owner training, and obtaining as-built drawings, O&M manuals, warranties, and etc.

Paige Lawrence, CCM, EIT

Project Engineer

Education

B.S., Civil Engineering, Gonzaga University, Spokane, WA

Certifications & Licenses

Certified Construction Manager, Construction Management Association of America, CMCI #12450

Engineer-in-Training, Board for Professional Engineers, Land Surveyors and Geologists, State of California, License No. 33828

OSHA 30-Hour Construction Training, Serial NO. 30908361

Industry Affiliations

Construction Management Association of America, Southern California Chapter

American Public Works Association

Software

Microsoft Office
Bluebeam
Adobe Acrobat
Orion
Procore
Primavera P6

Paige is a qualified construction management professional with diverse experience in design, planning, construction, and project management for various multi million-dollar public projects. Her track record includes the successful execution of sensitive, fast paced projects while managing various stakeholder needs and goals.

Paige is passionate about streamlining project communication and working collaboratively to maximize project efficiency and deliver 21st century learning environments. Her knowledge of DSA requirements and protocols and experience with multiple delivery methods, including multi-prime, lease-leaseback, job order contracting (JOC), design-bid-build, and cooperative purchasing, has provided her a strong understanding of project sequencing, leading to successful roll out and execution.

Relevant Experience

Project Engineer, James Madison Elementary School, HVAC Project, Long Beach Unified School District

- Served as Project Engineer for \$11M lease-leaseback, DSA approved HVAC upgrade/modernization project, which included installation of new fire alarm systems, new lighting/lighting controls systems, ADA accessibility upgrades to restrooms and pathways, classroom technology upgrades, new roofs, and site utility work.
- Worked with design team, contractor, and District to manage design issues during construction and address many inconsistencies with District standards.
- Reviewed and monitored contractor schedule and mitigated potential project delays including a delay due to Southern California Edison's review process.
- Negotiated payment applications, project contingency change orders, and tracked all potential costs, credits, and risks to the project.
- Managed & reviewed contractor allotment cost, & implemented lessons learned from initial project phase to save cost in upcoming classroom buildings with similar design.
- Managed the project during the Corona Virus Pandemic working with the contractor, District, and school site to implement and communicate protocols as they were modified.
- Applied lessons learned from previous LBUSD projects including design and set up of temporary admin, move team coordination, completing pre-construction surveys of existing conditions, and cost savings and negotiations based on similar changes on previous projects

Project Engineer, Lakewood High School Campus Wide HVAC Installation, Long Beach Unified School District

- Served as Project Engineer for \$43M lease-leaseback, DSA approved HVAC upgrade and modernization project, which included installation of new fire alarm systems, new lighting/lighting controls systems, ADA accessibility upgrades to restrooms and pathways, classroom technology upgrades, new roofs, and site utility work.
- Reviewed and negotiated \$3M in project change orders, delay fragnets, and productivity and efficiency losses.
- Anticipated and tracked all potential cost, credits, and risks to the project due existing conditions, scope changes, design deficiencies, and unforeseen schedule impacts.
- Evaluated monthly schedule updates, and recovery schedules for activity progress and responded to updates accordingly.
- Reviewed pay applications and monitored project cashflow and manpower.



- Documented daily site activities, and reviewed, logged and distributed Construction Change Directives (CCDs), Construction Directives (CDs), Request for Information (RFIs), and submittals
- Assisted in coordinating move management with site staff and general contractor for five (5) project phases throughout eight (8) impacted buildings.
- Managed closeout process included completion of punchlist, training, turnover of all project documents included O&M, as-builts, warranties and attic stock.

Project Engineer, James Garfield Elementary School, HVAC project with Alterations, Long Beach Unified School District

- Served as the Project Engineer for \$16M lease-leaseback, DSA approved HVAC upgrade and modernization project, which included installation of new fire alarm systems, new lighting and lighting controls systems, ADA accessibility upgrades to restrooms and pathways, classroom technology upgrades, access control upgrades, new roofs, and site utility work.
- Project site was occupied throughout construction; Communicated progress and expectations with site administration on a weekly basis to eliminate conflicts between construction and site occupants.
- Project included 4 classrooms buildings, 1 auditorium and 1 kitchen and café building. Worked with District and contractor to accommodate double shifts (7am-3pm) and (3p-11pm), 6 days a week to complete this work over a 9-month period, across 3 phases.
- Reviewed and negotiated contractor pay applications and change orders.
- Ran project meetings, reviewed, logged, and distributed contract documents, Requests for Information (RFIs), Submittals, and Construction Change Directives (CCDs) and maintained construction records and reports.
- Documented daily project activities, coordinated with the architect, contractor, and owner to resolve design and construction issues.
- Managed closeout process included completion of punchlist, training, turnover of all project documents included O&M, as-builts, warranties and attic stock.

Additional Relevant Experience

Project Manager, Lake Washington School District

- Managed and delivered 50+ projects from conception through completion for the 3rd largest and fastest growing K-12 school district in Washington State.
- Responsible for planning and oversight of district-wide annual construction program including schedule, budget, design, and reporting and record-keeping strategies.
- Scoped and provided preliminary cost estimates for 70+ potential projects, representing \$20M in capital work for the following 2 years.
- Post the passing of the District's \$400M construction bond measure, worked to track and develop District standards for furniture, finishes, security, envelope improvements, and athletic fields.
- Inventoried and assessed aspects of District's 52 sites for planning purposes.

Juan Bermudez

Project Engineer

Education

Bachelor of Architecture,
California State Polytechnic
University, Pomona

Certifications

30 Hour OSHA

10 Hour OSHA

Software

Form Z
AutoCAD
Architectural Desktop
Photoshop
Microsoft Office Suite
Primavera
Expedition

Juan is an accomplished, high-energy, and results-oriented Project Management Professional with over ten (10) years of experience coordinating and executing construction activities from pre-construction through close-out. He possesses a degree in Architecture, and he has supported complex, multimillion-dollar construction programs, such as Los Angeles Unified School District, Glendale Unified School District, California State University Long Beach, and City of Diamond Bar. Throughout his career, Juan has proven himself to be an excellent asset in working closely with DSA to support capital improvement projects from conception to closeout and occupancy.

Juan has successfully managed projects on behalf of the Owner and as such, has vast experience in delivering projects using various project delivery methods such as design-build, traditional design-bid-build, multi-prime, among many others with a project portfolio that includes campus facilities projects up to \$500M, as well as programmatic experience for LAUSD's billion-dollar construction program. His experience also includes site work, utilities, landscape, hardscape and demolition aspects of projects.

Relevant Experience

Site Wide HVAC Installation and Improvements, Madison Elementary School, Long Beach Unified School District

Installation of HVAC units to 24 classrooms, administration building and multipurpose building. Installation of new flooring and ceiling in 24 classrooms, installation of new LED lighting and replacement of existing windows. Upgrade the accessibility entrances as required by DSA.

- Negotiate change orders and review/approved payment applications including verification of as built's update
- Review all RFIs and submittals to confirm specification compliance
- Create/Update construction project status reports
- Acquire all close out packages and coordinate DSA certification documentation
- Conduct weekly construction meetings and update the construction progress information per district requirements

New Auditorium Ramp and Kitchen Restroom Upgrade, Keller Middle School, Long Beach Unified School District

Installation of ADA ramp in front of auditorium building and Kitchen rest room upgrade per DSA requirements.

- Negotiate change orders and review/approved payment applications including verification of as built's update
- Review all RFIs and submittals to confirm specification compliance
- Create/Update construction project status reports
- Acquire all close out packages and coordinate DSA certification documentation
- Conduct weekly construction meetings and update the construction progress information per district requirements

Demolition of Classrooms, Site Improvements and Installation of Portable Classrooms, Stephens Middle School, Long Beach Unified School District

Demolition of six classroom building and 2 classroom building, abatement of both buildings. Re grading of site and reinstallation of site utilities suitable to reinstall 6 single portable buildings as well as upgrading students and staff restrooms per DSA requirements

- Negotiate change orders and review/approved payment applications including verification of as built's update
- Review all RFIs and submittals to confirm specification compliance
- Create/Update construction project status reports



- Acquire all close out packages and coordinate DSA certification documentation
- Conduct weekly construction meetings and update the construction progress information per district requirements

Campus Wide HVAC Installation and Site Improvements, Webster Elementary School, Long Beach Unified School District

Installation of HVAC units to 18 classrooms, administration building and multipurpose building. Installation of new flooring and ceiling in 18 classrooms, installation of new LED lighting and replacement of existing windows. Upgrade the accessibility entrances as required by DSA.

- Negotiate change orders and review/approved payment applications including verification of as built update
- Review all RFIs and submittals to confirm specification compliance
- Create/Update construction project status reports
- Acquire all close out packages and coordinate DSA certification documentation.
- Conduct weekly construction meetings and update the construction progress information per district requirements

Campus Wide Landscape Renovation and Concession Building, Norwalk-La Mirada Unified School District

Projects included landscape renovation throughout the whole school, a new track and field, new concession building, remodeling of existing west parking lot, site lighting, relocation of four (4) portable buildings, paving and playground reconstruction, outdoor exercise equipment and new marquee sign. Scope of work included:

- Coordinating additional service contracts for added work by the client.
- Evaluating of contract change orders and amendments for impact on budget and schedule and participation in change order negotiations.
- Management of the architect, design consultants, and the inspector of record to provide clear buildable construction documents to the general contractor to deliver a quality project to the client as a team.
- Managing coordination between the District, campus representatives, and project stakeholders to ensure successful project delivery.
- Conducting weekly construction meetings and updating the construction progress information for board reports.
- Approving monthly payment application and reviewing monthly schedule updates to ensure projects stay on track.

Campus Wide Landscape Renovation and Accessory Structures, Corvallis Middle School, Norwalk-La Mirada Unified School District

Projects included landscape renovation throughout the whole school, new parking lots on the west and east site of the lot, new track and field, installation of seven (7) shade structures, site lighting, paving and playground reconstruction, outdoor exercise equipment and new marquee sign. Scope of work included:

- Coordinating additional service contracts for added work by the client.
- Evaluation of contract change orders and amendments for impact on budget and schedule and participation in change order negotiations.
- Management of the architect, design consultants, and the inspector of record to provide clear buildable construction documents to the general contractor to deliver a quality project to the client as a team.
- Managing coordination between the District, campus representatives, and project stakeholders to ensure successful project delivery.
- Conducting weekly construction meetings and updating the construction progress information for board reports.
- Approving monthly payment application and reviewing monthly schedule updates to ensure projects stay on track.



Balboa Elementary School, Glendale Unified School District

Project consisted of 12-classroom building with integrated high-tech computer lab, two (2) support rooms restrooms, elevator, outdoor amphitheater and installation of 12 HVAC Units with commissioning. Scope of work included:

- Coordinating the balancing of the units between the commissioning agent and the mechanical engineer.
- Management of the architect, design consultants, and the inspector of record to provide clear buildable construction documents to the general contractor to deliver a quality project to the client as a team.
- Assisted with tracking the changes made by the client and coordinated with the architect/engineers to submit changes to DSA via addenda until approved.
- Evaluation of contract change orders and amendments for impact on budget and schedule and participation in change order negotiations.

RD White Elementary School, Glendale Unified School District

Project consisted of 18-classroom building with integrated high-tech computer lab, two (2) support rooms restrooms and elevators; enhancements to the original classroom building was accomplished by sharing a connecting courtyard for student activities and 18 HVAC Units with commissioning. Scope of work included:

- Oversight of weekly and monthly cost and schedule updates, reports, and overall progress.
- Ongoing management of project budget and schedule, review and approval of monthly payment requests, review and negotiation of change orders, review of submittals, RFIs, as-built drawings, construction cost estimates, and identification and mitigation of project risks.

Verdugo Woodlands Elementary School, Glendale Unified School District

Project consisted of 20-classroom building with integrated high-tech computer lab, two (2) support rooms restrooms and elevators; 20 HVAC Units with commissioning; additional amenities included two shade structures with play apparatus and area for students during break. Scope of work included:

- Management of the design process and constructability review process related to reclaimed water plans for the project as well as managing the approval process by the local building and safety office as well as the Los Angeles County Department of Health Office.
- Development of project budget and schedule, monthly project status and dashboard reports, and staffing plans.
- Implementation of standard controls processes and policies to ensure compliance with standard operating procedures, contract conformance, and quality assurance.
- Oversight of construction permits, reviewing and approving contracts, and daily field execution.

Additional Project Experience

- Los Cerritos Dormitory– California State University, Long Beach (\$6 Million)
- Central Region Close-Out Department, Various Projects – Los Angeles Unified School District (\$50 Million+)
- Heritage K-12 (Ambassador Hotel) Project – Los Angeles Unified School District (\$500 Million)
- Central Region Elementary School #17 – Los Angeles Unified School District (\$16 Million)

Zoe Yang

Project Controls Manager (As-Needed)

Education

B.S., Business Administration.
Emphasis in Finance, California
State Northridge University

Software

Microsoft Access
Word
Excel
Power Point
Laserfiche
Contract Manager (Expedition)
InfoMaker
Prolog Manager
Primavera Proj. Planner (P3/P6)
Crystal Report Writing
ViewPoint
SureTrak
Visio
CYMA
Bidtek

Zoe has 25 years of experience in construction management, contract development, construction administration, program and document controls, and subcontractor coordination. She is highly proficient with multiple administration, planning, coordination and development software programs sets, and well-versed in the use of all Microsoft-based programs, Contract Manager (Primavera Expedition), InfoMaker, Primavera Project Planner (P3), Visual dBASE 5.5, Crystal Report Writing, Prolog Manager 7.0, SureTrak, Visio, CYMA, and BidTek.

Zoe has worked throughout California, including assisting with the development of the Policies and Procedure Manual for the Los Angeles Unified School District Proposition BB School Repair and Construction Program. She was integral in coordinating with local minority employment support groups throughout the program. Zoe also has experience in the public-works sector, coordinating and assisting the Office of Affirmative Action Compliance for the County of Los Angeles. Her ability to successfully execute each stage of a program, from development to close-out, allows large-scale, multi-prime programs to run smoothly, within budget and on-schedule.

Relevant Experience

Glendale Unified School District, Glendale, CA

As Project Controls Manager for a \$270 million bond program, Zoe was responsible for scheduling, cost control, data management/ reporting, and monthly reporting, and preparation of project authorizations and contracts. She developed the program master schedule, cash flow, and prioritization assessment, developed construction document forms/reports to be uploaded in web-based construction management software (ViewPoint), maintained and organized FTP site, and reviewed payment application against contracts. She also prepared cost-loaded schedules to support comprehensive cash flow projections.

Long Beach Unified School District, Long Beach, CA

As Project Controls Manager of a \$1.5 billion LBUSD bond program, Zoe was responsible for developing/updating the Program Master Schedule, researching/ developing construction document forms and templates, developing various construction process flowcharts and procedures, researching/implementing program-wide document control process via Laserfiche, reviewing/formatting General Conditions of the LLB contract template, researching/implementing Laserfiche documentation process automation and user group training sessions, and researching/implementing construction management software.

East Los Angeles College, Monterey Park, CA

As Project Controls Manager for a \$655 million building program for East LA College, Zoe was responsible for project budget maintenance, processes and monitoring encumbrance/commitments into the program's cost systems "Uii" and "PMIS"; monthly reporting; researching and reconciling data discrepancies in PMIS; researching and approving task orders/contract amendments/FF&E purchase orders/Proposed Board Action (PBA); researching and unencumbering any unspent project funds; and reviewing/validating the program schedule monthly. She also researched and developed a campus-wide budget recovery plan. In addition, she researched and revised the CPM Staffing Plan for the extension of program schedule.

Brianna Quintanar

Project Controls Manager (As-Needed)

Education

B.S., Business Management,
San Diego State University, San
Diego, CA

MBA, Concentration in Project
Management, Mount St. Mary's
University, Los Angeles, CA

Certifications / Affiliations

Certified Associate in Project
Management (CAPM®)

PMI® Member – Project
Management Institute, Global
and Los Angeles Chapter

Software

Microsoft Office
Adobe
Prolog
Eden
CAPP Analytics

Brianna has over seven years of experience in the construction field, all of which has been in the public sector arena. She has proven her value in construction by utilizing her project controls skills while working with Anaheim Union High School District, Orange Unified School District, and the City of Inglewood. As an excellent organized communicator, Brianna is an asset to any construction team.

Relevant Experience

Anaheim Union High School District, \$250M Measure H Bond Program, Anaheim, CA
Brianna served as a Project Controls Manager at Anaheim Union High School District for the District's \$250M Measure H Bond Program. Responsibilities included assisting with project planning, funding tracking, Board of Trustee and Citizens' Oversight Committee reports, design management and construction management. Evaluated contract change orders and amendments for impact on budget and schedule. Participated in change order negotiations. Conducted construction/project site visits for progress reporting. Analyzed actual expenditures versus budget performance. Coordinated and support the processing and approval of construction change documentation including Change Directives, Change Order, Contractor's Change Requests, and other documents, as required.

Orange Unified School District, \$188M Measure S Bond Program, Orange, CA
Brianna provided support as Project Coordinator for the District's first ever bond program. Assisted in review of submittal procedures, RFIs and monthly invoices. Responsibilities included validating invoices against executed agreements. Resolving any issues with consultants regarding outstanding invoices. Generating Project Reports addressing all aspects of project development and completion.

Additional Project Listing

- Katella High School Drop Site Improvement Project – Anaheim, CA (\$11.3M)
- Cypress High School Site Improvement Project – Anaheim, CA (\$10.5M)
- Kennedy High School Site Improvement Project – Anaheim, CA (\$6.2M)
- Anaheim High School Aquatics Center – Anaheim, CA (\$13M)
- Dale Junior High School, New Construction, Modernization & Polaris – Anaheim, CA (\$42M)

AJ Ruiz

Project Controls Manager (As-Needed)

Education

B.S., Biological Sciences,
University of California, Davis

Languages

Spanish
English

AJ has over 15 years of experience in providing project controls and construction and program management support services for K-12 and higher education projects. AJ is a highly productive, detail-oriented multi-tasker with excellent interpersonal and communication skills. She is proficient in a variety of productivity applications and works efficiently in both team and independent settings.

Relevant Experience

Measure K Bond Program (\$1.2B) and Measure E Bond Program (\$1.5B), Long Beach Unified School District.

Provided project controls management services for LBUSD Bond Programs.

- Assisted in performing fiscal analysis related to facilities planning and construction accounting, budgeting, invoicing and payment requests.
- Monitored accounts to assure funds are appropriately expended and assure compliance with applicable laws, codes, rules and regulations.
- Served as a liaison between District personnel and outside agencies regarding move management activities; communicate with District staff, consultants and representatives of public agencies regarding planning requirements, schedules and issues.
- Utilized a variety of advisory data and information including budgets and schedules, to assist in making appropriate decisions supporting the interests of the District.
- Provide information to Facilities management regarding assigned functions; provide advisement of unusual trends or problems and recommend appropriate corrective action.
- Assisted in construction closeout in coordination for moving services.

Santa Monica Community College District, Santa Monica College, CA

As Project Controls Manager, provided construction and program management support services for Santa Monica College.

- Responsibilities included administrative coordination for construction projects: assisting with preparation for meetings with the design, contractor and owner teams, creation of project status reports for Senior Management, coordination with testing and inspection staff, and responding to all owner requested inquiries, and tasks.
- Other tasks included management of project progress documentation which includes, but is not limited to, contractor payment applications, potential change orders, change orders and Santa Monica College Board of Trustees Meeting Agenda, filing county Notices of Completion and coordination of Division of the State Architect (DSA) project close out.
- Additional job duties included keeping accurate budget records for bond accountability reports, review of vendor and consultant invoices, coordination of project bids and administration of a custom designed web-based project management application. Position required knowledge of the state Director of Industrial Relations requirements and Southern California Contract Compliance and Labor Enforcement document requests, as well as the ability to manage a high-volume workload and multi-task in a demanding environment.

Garry Attridge, AIA

Constructability Review (As-Needed)

Education

B.S., Architecture, North London University School of Architecture and Interior Design, London, United Kingdom

Diploma, Architecture and Building Technology, London School of Building and Construction Technology, London, United Kingdom

Certifications

American Institute of Architects (AIA), License No. 29661

Licensed General Building Contractor—B
(License No. B980175), State of California

OSHA 10, Occupational Safety and Health Administration, US Department of Labor

Garry is a senior-level construction management professional with over 30 years of project management, design, and architecture experience. He has extensive knowledge of pre-construction activities supporting large construction projects ranging from \$1 million to over \$2 billion, many of which included K-14 and higher education projects. Garry has been responsible for client presentations, contract negotiation, program and project management, planning, scheduling, construction administration, and project bidding and negotiation. Garry is a licensed architect and general contractor with a strong work ethic and excellent communication skills.

Relevant Experience

Arcadia Unified School District, New Buildings & Modernizations, Arcadia, CA

As Senior Project Manager, Garry provided management and oversight for multiple general contracting projects and programs with a combined value of \$271 million. He was responsible for all aspects of preconstruction and construction estimating, subcontractor negotiation, reporting, scheduling, accounting, quality, safety, claims management, cost and profit projections, and all day-to-day challenges of the project from programming to completed project and occupancy.

Los Angeles Unified School District, Comprehensive Modernization, Los Angeles, CA

As Senior Project Manager, Garry was the responsible liaison for architects/engineers and District management regarding multiple project design progress to ensure project activities complied with the District's standards and school requirements by providing interpretation of design and application of construction methods. Garry performed design review, constructability analysis, value engineering, budgeting and cost review and analysis, and coordinated phasing for construction and recommended delivery method to LAUSD management. Projects included:

- North Hollywood High School, Comprehensive Modernization (Design-Bid-Build / \$210 million)
- Sherman Oaks Center for Enriched Studies School (Design-Build / \$120 million)
- Verdugo Hills High School Comprehensive Modernization (Design-Bid-Build / \$11 million)

San Bernardino Community College District, New Three-Story Gymnasium, San Bernardino, CA

Garry served as the Senior Project Manager for the new \$52 million lease-leaseback three-story gymnasium at Victor Valley College. The project consisted of two large gymnasiums on the second floor, basketball courts, fitness rooms, as well as athletics and staff offices, classrooms, state-of-the-art training facilities, and equipment rooms. The project also consisted of a new football stadium and upgrades to the existing infrastructure, new visitor bleachers, restroom building and team rooms, and concessions and ticket buildings adjacent to the stadium. The project was awarded LEED Silver certification.

Dean Taylor, RA

Constructability Review (As-Needed)

Education

Bachelor of Architecture,
University of British Columbia,
Vancouver, BC

B.F.A., University of British
Columbia, Vancouver, BC

Licenses & Certifications

American Institute of Architects
(AIA), No. 38644194

National Council of Architectural
Registration Boards, Certification
No. 45697

Registered Professional
Architect, State of Arizona,
Registration No. 26951

Dean has over thirty years of diverse experience, including development and project management, consultant and design team coordination, bidding and construction administration, agency and community relations, and professional practice in architecture. His experience covers a wide variety of project types including infrastructure, mixed-use and commercial office, master-planned communities, multi-family and senior living residential, telecommunications, education, and industrial developments. Dean's focus is managing collaborative project teams, including engineering consultants, building contractors, and asset/property managers to successfully develop client projects.

Relevant Experience

Los Angeles USD, San Pedro High School Comprehensive Modernization, San Pedro, CA

Constructability Review Manager for this comprehensive, \$132 million, design-bid-build modernization, which included the seismic retrofit and major modernization of three historic buildings, demolition of two shop buildings and 17 portable classrooms, and construction of a new Administration/Food Service/Classroom Building and Woodshop/Band Building. The project also included seismic retrofit of the main gym, replacement of the central plant equipment, site-wide infrastructure repair/replacement, improved campus security, and programmatic access.

Los Angeles USD, Huntington Park High School Comprehensive Modernization, Huntington Park, CA

Constructability Review Manager, responsible for day-to-day management of all pre-construction phases of this comprehensive, \$113 million, design-bid-build modernization. The project included demolition and replacement of three main buildings: the main gym and pool, a classroom building and culinary arts/robotics/flex lab building. The project also includes demolition of the central plant, HVAC repairs and minor modernization at the historic main administration building, HVAC repairs at the science building, site infrastructure upgrade/replacement, portable building removal, programmatic access, landscaping, hardscaping, fencing and security.

Los Angeles USD, 92nd Street Elementary School Comprehensive Modernization, Los Angeles, CA

Constructability Review Manager for this \$87 million design-build project, which included the retrofit, modernization or replacement of the main assembly/classroom building to improve seismic safety, the removal and replacement of classrooms in relocatable buildings, the repair, upgrade or replacement of building systems in the remaining permanent buildings, site infrastructure upgrades, including sanitary sewer, water, and electrical utilities, site-wide programmatic access, and improvements to landscape, hardscape and site security.

Alvarado Elementary School, Alvarado, CA

Dean was responsible for all design/construction phases of this 40,000-sq.-ft. state-funded elementary school. The campus included one- and two-story structural steel framed instructional buildings, an administration building, food service and assembly area, and physical plant.

Michael Echelmeier, DBIA Assoc., LEED AP, AIA

Constructability Review (As-Needed)

Education

Bachelor of Architecture,
California Polytechnic State
University, San Luis Obispo, CA

Certifications

DBIA Professional, Design-Build
Institute of America

LEED Accredited Professional,
U.S. Green Building Council

AIA Associate, American
Institute of Architects

Michael has worked in the construction and design industry since 1989 and has been involved in all aspects of the design-construction process, including constructability reviews, planning, design management, cost estimating, design, scheduling, project management, and construction management. This experience has allowed Michael to obtain a complete understanding of construction methods and practices.

In his lead role performing constructability reviews, Michael is responsible for reviewing contract documents to ensure compliance with the program/project requirements, design standards and guidelines, relevant codes and regulations, and meet the objectives for the respective project. Michael's proficiencies include conducting visual site inspections to help identify potential impediments to the design and construction process and to reconcile ambiguous and conflicting design elements during the constructability review process.

Relevant Experience

- Antelope Valley Union High School District, New Eastside High School Back Check, Lancaster, CA
- Berkeley Unified School District, Jefferson Elementary School Modernization, Berkeley, CA
- Castro Valley USD, Measure G Construction Support Services, Castro Valley, CA
- Chino Valley Unified School District, Multiple Modernization and Addition Projects, Chino, CA
- Colton Joint Unified School District, Abraham Lincoln Elementary School Modernization, Colton, CA
- Emery Unified School District, Emery High School, Fire Sprinklers, Emeryville, CA
- Glendale Unified School District, Measure S Bond Program, Glendale, CA
- Lake Elsinore Unified School District, Elsinore High School, Baseball Field-Courtyard-Civil Improvements, Wildomar, CA
- Los Angeles Unified School District, North Hollywood High School, Comprehensive Modernization, Los Angeles, CA
- Morgan Hill Unified School District, Districtwide Campus Needs Assessment, Morgan Hill, CA
- Pasadena Unified School District, Blair High School, Chemistry/Biology Classrooms, Pasadena, CA
- Reed Union School District, 10 Projects, Tiburon, CA
- Sacramento City Unified School District, Districtwide Study and Master Plan, Sacramento, CA
- Santa Maria-Bonita School District, Taylor Classroom Addition, Santa Maria, CA
- Tustin Unified School District, Beckman High School, Classroom Building Additions and Renovations, Tustin, CA
- Woodland Joint Unified School District, New Spring Lake Elementary School, Woodland, CA
- Yuba City Unified School District, Yuba City High School #2, Yuba City, CA

Alan Campbell, MRICS, NEBOSH

Value Engineering (As-Needed)

Education

B.S., Quantity Surveying,
Abertay University, Dundee,
Scotland, UK

Certifications & Licenses

Certified Member, Royal
Institution of Chartered
Surveyors, No. 0856490, 2001

NEBOSH General Certificate,
National Examination Board in
Occupational Safety and Health,
2004

Alan has worked in the construction industry since 1994. He is an experienced professional who has focused his career on providing cost management consulting services. Alan also possesses experience in construction planning and has held roles in commercial and residential development and management. His accomplishments in the construction industry in the U.S. and UK contribute a unique proficiency and perspective to each of his project assignments. Alan has collaborated on a broad range of project types throughout his career, including healthcare, transportation, education, public works, and industrial remediation. Alan performs services which support pre-construction, construction, and post-construction phases, including but not limited to, cost planning, milestone estimating, quantity take-offs, site walks, bid reconciliation, preparation of valuations, pricing validation, and change order claim review. Alan also possesses a strong background in arbitration and dispute resolution.

Relevant Experience

K-12 Experience (Partial Listing)

- Carlsbad USD - Carlsbad High School, Chiller Plant & Science Bldg. Modernization, Carlsbad, CA
- Compton USD, District Services Dept. (Food Service/Warehouse/Mechanics Shop) Relocation Feasibility Study, Compton, CA
- Corona Del Mar High/Middle School, Access Upgrades to Site & Interiors, Newport Beach, CA
- Corona Del Mar Middle/High School, Athletic Complex Improvements Study, Newport Beach, CA
- Corona Del Mar Middle/High School, New Sports Fields-New Bleachers-Site Work, Newport Beach, CA
- Estancia High School, New Aquatic Center, Costa Mesa, CA
- Fullerton JUHSD, Fullerton High School Plummer Auditorium Seismic Upgrade & ADA Modernization, Fullerton, CA
- Harbor Day School, New Private K-8 School Programming, Corona Del Mar, CA
- HBCSD Moffett Elementary School, Measure Q Modernization Ph. 1 - Classrooms/Library/ADA Upgrades, Huntington Beach, CA
- HBCSD Sower Middle School, New Gym/Multi-Purpose Bldg. & STEM Lab - Measure Q Phase 1, Huntington Beach, CA
- Huntington Beach City School District, Measure Q Bond Program Phase 1 Seismic Retrofit Projects at 3 Campuses, Huntington Beach, CA
- LAUSD Canoga Park High School, Visual & Performing Arts Facilities Upgrade Project, Canoga Park, CA
- LAUSD Griffith Middle School, Modernization & New Admin.-Library-Gym-Science Facilities, Los Angeles, CA
- LAUSD Hamilton High School, Comprehensive Modernization Master Plan & Seismic Upgrades, Los Angeles, CA
- LAUSD International Studies Learning Center, New Multi-Purpose Building, South Gate, CA
- Newport Heights ES-Wilson ES-Mariners ES, Administration Bldgs. Remodeling & Site/ADA Improvements, Newport Beach, CA
- Newport-Mesa USD, HVAC System Replacement for 6 Elementary Schools, Costa Mesa, CA
- Newport-Mesa USD, Summer 2018 Projects at Eight Campuses, Newport Beach/Costa Mesa, CA
- NLMUSD Benton Middle Sch., Landscape & Playfields Renovation, La Mirada, CA
- NLMUSD Benton Middle Sch., OPSC Work Sheets for Site Development as Part of Campus Modernization/Upgrades, La Mirada, CA
- NLMUSD Corvallis Middle Sch., Landscape & Playfields Renovation, Norwalk, CA
- NLMUSD Corvallis Middle Sch., OPSC Work Sheets for Site Development as Part of Campus Modernization/Upgrades, La Mirada, CA

Gary Tasich, RA

Value Engineering (As-Needed)

Education

B.S., Architecture, University of Nebraska

Certifications

California Licensed Architect,
License No. C-10371

General Contractor License B,
Contractor State License Board,
License No. 455232

Software

Expedition
Microsoft Project
Primavera P6
Prolog

Gary is a California Licensed Architect and Contractor with over 35 years of design management and construction management experience in the management and oversight of multi-million-dollar projects from design, construction, and closeout. Gary has extensive experience successfully delivering projects valued as high as \$190 million and programs estimated at \$300 million across a variety of industries, using various project delivery methods, managing the design and construction of complex public facilities for various public clients throughout the state of California. This includes \$300-million hospitals with OSHPD/DHS requirements and \$200-million educational facilities with DSA requirements.

Gary's relevant experience includes the successful management of pre-construction and construction, schedule and cost management, implementation planning, document review, constructability review, value engineering, and procurement of all design professionals, consultants and contractors for various public works projects and clients. Gary brings exceptional cross-functional and team building skills that can positively impact any organization by influencing key stakeholders and utilizing highly persuasive communication techniques to ensure buy-in at all levels. A hands-on leader, he is adept at identifying and capitalizing on cost reduction opportunities at an operational level while never losing sight of broader organizational goals.

Relevant Experience

Los Angeles Unified School District, Los Angeles, CA (\$62M)

As Project Development and Design Manager, Gary was responsible for project development, budgets and schedules for as many as 17 multi-million dollar projects including management of 5 design managers. Projects include HVAC critical repair replacement projects, modernizations, science labs, seismic upgrades, ADA improvements, early education outdoor classrooms, parking areas, quad development and small learning communities.

Orange Unified School District, Orange, CA

Project Manager for various District projects, including two new classroom buildings, kitchen/dining and administration relocations, multiple existing classroom refurbishments in various buildings, new lunch shelter, new landscaped quads, parking lot landscape, irrigation & lighting upgrades, fire lane, demolition and main utilities relocations.

Beverly Hills Unified School District, Beverly Hills, CA

Construction Manager for DSA projects including modernization and addition to a 1927 vintage historical elementary school building that included demolition, structural foundation work and architectural restorations to preserve an existing theatre/auditorium and bell tower and a new addition.

University of California, Los Angeles, Northwest Campus Housing Program, Los Angeles, CA (\$130M)

As Construction Manager, Gary worked on three nine-story dormitory buildings, two existing dormitory first floor modernizations, and a 294 car parking structure. This was the first UCLA housing project to bid under budget and the bid spread was less than one percent. These projects required extensive new sewer and utilities infrastructure. Gary highlighted a need to secure sewer capacity approval from the City of Los Angeles which took over a year to complete.

Crisostomo (CJ) Jocson

Cost Estimator (As-Needed)

Education

B.S., Civil Engineering, FEATI
University, Manila, Philippines

Licenses

Licensed Civil Engineer
PRC Reg No. 025915

Software

Bluebeam Revu
Microsoft Office Suite
Expedition
MC² On Screen Take-Off

CJ has over 25 years of experience in the construction industry, with extensive experience in estimating, quantity surveying, and project controls working on California educational programs and projects. CJ is well-versed in hard bid estimates, various forms of project controls and construction administrative support, fair cost estimates (FCE) for change orders, price negotiation, and job order contract (JOC) review and evaluation. CJ's experience includes working with owners, management, and general contractors through all stages of construction.

Relevant Experience

Districtwide Project, Los Angeles Unified School District, Los Angeles, CA

Provided independent reviews and evaluations of job order contract (JOC) proposals; fair cost estimates (FCE) for change order review and negotiation for all trades; and conceptual/budget cost estimate based on CDs, CCDs, sketches and RFCs. Also performed A/E estimate evaluation prior to project being sent out to bid, prepared quantity take-off using Bluebeam for proper change order evaluation, price solicitation to suppliers/subcontractors for estimate comparison, technical and cost engineering support to the OAR and project team, and assisted the owner authorized representative in cost/price negotiation. Projects included:

- Region 1 & 2 – Project Execution (\$3.0 million per year)
- VR SPAN K-8 #1 (\$69.9 million)
- VR SPAN K-8 #2 (\$55.9 million)
- Valley Region High School #7 (\$61.1 million)
- Valley Region Elementary School #9 (\$57.9 million)
- Valley Region High School #4 (\$85.9 million)

Monroe Middle School, Inglewood Unified School District, Inglewood, CA

Scope of work for this \$9.9 million project consisted of new construction of a two-story, 15,373-sq.-ft. gymnasium building with two classrooms on the upper level, play court with folding backstops, retractable seating, and a raised platform stage with wheelchair lift.

T.E.C. Building Renovations, Southwest College, Los Angeles Community College District, Los Angeles, CA

Scope of work for this \$4.5 million project consisted of limited demolition, interior tenant improvements at select areas, and new interior painting throughout.

Additional Project Listing

- El Cariso Regional Park Improvements, Sylmar, CA (\$3.85 million)
- Shield Storm Drain Pump Station, Huntington Beach, CA (\$2.2 million)
- Hoover / Greenleaf Reservoir, Whittier, CA (\$6.0 million)
- Santa Fe Water Treatment Plant, Rancho Santa Fe, CA (\$8.0 million)

Mario Antony

Cost Estimator (As-Needed)

Education

Bachelor of Arts, Engineering,
Aquinas College of Higher
Studies, Colombo, Sri Lanka

Mario has 40 years of experience in cost estimating and management services. He has broad-based experience with an emphasis on civil, architectural, electrical, and mechanical disciplines. He has provided construction estimating for public, commercial, industrial, and residential clients throughout the world. Mario is equally adept at working on projects for renovation, new construction, master plan, or condition assessments.

Having built a large portfolio of project experience, Mario is knowledgeable in all aspects of the estimating process including budgeting, preparing independent cost models, detailed quantity take-off, obtaining price quotes, and incorporating estimates from various project trades. Additionally, he is skilled in performing cost value engineering analysis, claims review and change order evaluation.

Relevant Experience

K-12 Experience (Partial Listing)

- Anaheim City School Dist., New Ponderosa Elementary School, Anaheim, CA
- Bonita Canyon Elementary School Modernization, Irvine, CA
- Chula Vista Elementary School District, Measure E Projects, Chula Vista, CA
- Columbus Tustin Middle School, OPSC Worksheet for Site Development, Tustin, CA
- Corona Del Mar High Sch., New Theater/Perf. Arts Bldg., Newport Beach, CA
- Corona-Norco USD, Eleanor Roosevelt High School New eSTEM Academy & Site Development OPSC Worksheet, Eastvale, CA
- Dana Middle School, Joint-use Gymnasium, Arcadia, CA
- Downey High School, Automotive Tech Bldg. 2nd Floor Storage Conversion to Robotics Lab, Downey, CA
- Earl Warren Middle School, Campus Development, Solana Beach, CA
- El Dorado High School, New Practice Gymnasium, Placentia, CA
- El Monte City School District, Training Center & Boardroom, El Monte, CA
- Esperanza High School, New Practice Gymnasium, Anaheim, CA
- Esperanza Special Educational School, Modernization, Mission Viejo, CA
- Estancia High School, New Aquatic Center, Costa Mesa, CA
- Fullerton JUHSD, Fullerton High School Plummer Auditorium Seismic Upgrade & ADA Modernization, Fullerton, CA
- Fullerton JUHSD, Sonora High School New Gymnasium, Fullerton, CA
- Garden Grove USD, Modernization Projects 33 Schools including ADA Access Improvements, Garden Grove, CA
- Hansen Elementary School, Modernization, Anaheim, CA
- HBCSD Circle View Elementary School, ADA-Seismic-DSA Required Upgrades/Modernization, Huntington Beach, CA
- HBCSD Hawes Elementary School, Measure Q Bond Program Phase 1 - Seismic Retrofit, Huntington Beach, CA
- HBCSD Moffett Elementary School, Measure Q Modernization Ph. 1 - Classrooms/Library/ADA Upgrades, Huntington Beach, CA
- National City MS, Site Development & ADA Accessibility, National City, CA
- Newport Harbor High School, Davidson Football Stadium Renovation & Expansion, Newport Beach, CA
- Newport Harbor High School, Robbins Hall Replacement, Newport Beach, CA
- Newport-Mesa USD, HVAC System Replacement for 6 Elementary Schools, Costa Mesa, CA
- NLMUSD Benton Middle School, Landscape & Playfields Renovation, La Mirada, CA
- NLMUSD Benton Middle School, OPSC Work Sheets for Site Development as Part of Campus Modernization/Upgrades, La Mirada, CA
- NLMUSD Benton Middle School, Seismic Retrofit of Building H, La Mirada, CA
- NLMUSD Corvallis Middle School, Landscape & Playfields Renovation, Norwalk, CA
- NLMUSD Corvallis Middle Sch., OPSC Work Sheets for Site Development as Part of Campus Modernization/Upgrades, Norwalk, CA

Rob Magnano, AIQS

Cost Estimator (As-Needed)

Education

Bachelor of Construction
Management w-Honors, Deakin
University, Geelong, Australia

Diploma of Building Design and
Drafting, Melbourne Polytechnic,
Melbourne, Australia

Certifications

Registered Quantity Surveyor,
AIQS, No. 14992

Affiliations

AIQS - Australian Institute of
Quantity Surveyors

AIQS Continual Professional
Development Committee
(formerly)

Urban Land Institute – NEXT
Council Member

Software

Aconex
Buildsoft Excel
Cost X
MS Office Suite
On-Screen Takeoff

Rob is a professional quantity surveyor and construction estimator who has been in the A/E/C industry since 2007. His experience spans from cost planning through all design milestone stages to post contract. Rob has been involved in assignments for multiple sectors including commercial, education, healthcare, residential industrial, and government – with construction values ranging from \$1M to over \$1B.

As Senior Cost Manager, Rob is a vital member of the cost team. He leads quantity takeoff activities, estimate preparation, cost modeling, reporting, peer review, and client consultation. Rob is well-versed in interpreting construction specifications/drawings to assure that scope is clearly understood. He is also a skilled communicator who functions well within a team and can provide insights/solutions to client issues. Having worked previously in the commercial construction sector, Rob gained invaluable experience working with builders, architects, property developers, and other stakeholders. He is knowledgeable in construction contract administration, procurement, and project coordination.

Relevant Experience

K-12 Experience

- LAUSD Hamilton High School, Comprehensive Modernization & New Classroom-Science-Perf. Arts Bldgs., Los Angeles, CA
- LBUSD Lakewood High School, Track & Field Replacement w-Synthetic Surface/Turf and Bleacher Upgrades, Lakewood, CA
- Los Angeles USD, District Headquarters Art Piece Structural Strengthening, Los Angeles, CA
- Melbourne Language Centre, Cost Planning, Melbourne, AUS
- Monterey Co. Office of Education - Salinas Community School, New Classroom Building & New Modular MPR, Salinas, CA
- Pomona USD - Roosevelt Elementary School, Roof Replacement, Pomona, CA
- Simi Valley USD - Royal High School, New Classroom Building Five Options Study, Simi Valley, CA
- Simi Valley USD - Royal High School, New Classroom Building, Simi Valley, CA

Higher Education Experience

- Australian Institute of Music, Structural Refurbishment & Fitout, Sydney, AUS
- Melbourne University, Multiple Projects, Melbourne, AUS
- Monash University, School of Architecture High-end Fitout, Melbourne, AUS
- Santa Barbara City College, New Gymnasium w-Locker Rooms-Fitness Ctr.-Classroom-Admin. Office, Santa Barbara, CA
- UC Irvine, Humanities Hall & Claire Trevor Theater Drainage & Seismic Upgrades, Irvine, CA
- UC Irvine, Social Sciences Lecture Hall and Humanities Hall & Bridge Seismic Retrofit/Deferred Maint. Improvements, Irvine, CA

Kunal Shah, EIT, LEED AP

Scheduler (As-Needed)

Education

Master of Construction Management, University of Southern California, Los Angeles, CA

Bachelor of Engineering in Civil Engineering, DDIT, Gujarat University, India

Registrations

Engineer-in-Training (EIT), Board for Professional Engineers, Land Surveyors and Geologists, State of California

LEED Accredited Professional (LEED AP), U.S. Green Building Council

Affiliations

Member, American Society of Civil Engineers (ASCE)

Member, Construction Management Association of America (CMAA)

Member, U.S. Green Building Council (USGBC)

Kunal is a seasoned scheduler with over 20 years of construction experience in program management, project management, and program controls—18 of which has been within the public works sector. Kunal's extensive experience includes forensic scheduling analysis, critical path analysis, time impact analysis, recovery schedules, cost and resource loaded schedules, among others, having served in management roles on large and complex multi-million and billion-dollar construction programs throughout Southern California.

With his experience successfully managing projects on behalf of owners and as a general contractor, Kunal has vast experience in delivering projects using various project delivery methods such as lease-leaseback, design-build, traditional design-bid-build, multi-prime, among many others. In addition to scheduling and controls, Kunal is highly proficient in programming, design management, construction management, cost management, estimating, contract administration, risk analysis and change order negotiation. His project portfolio includes over \$400 million in campus facilities programs, as well as programmatic experience in excess of \$9 billion.

Relevant Experience

Education (Higher Education/K-12)

- Anaheim Elementary School District, Sunkist and Roosevelt ES Projects
- Anaheim Union High School District, District-Wide Bond Improvements (\$249 million)
- Glendale Unified School District, District-Wide Bond Improvements (\$270 million)
- Long Beach Unified School District, Measure K and E Bond Program (\$1.5 billion)
- Los Angeles Unified School District, Bell Education Center, Bell, CA (\$27 million)
- Los Angeles Unified School District, District I Existing Buildings Renovation Program, Los Angeles, CA (\$170 million)
- Los Angeles Unified School District, New Construction Program (\$230 million)
- Los Angeles Unified School District, South Region High School #9 (\$68 million)
- Los Angeles Community College District, Sustainable Building Program (\$9.6 billion)
- Los Angeles Southwest College, Campus-Wide Bond Improvements (\$404 million)
- Norwalk-La Mirada Unified School District, Benton Middle School (\$7.7 million)
- Norwalk-La Mirada Unified School District, Corvallis Middle School (\$6.5 million)
- Orange Unified School District, District-Wide Bond Improvements (\$288 million)
- West Los Angeles College, Campus-Wide Bond Improvements (\$414 million)

Government - Municipal, State, Federal

- City of Carson, Water Pollution Control Plant (\$60 million)

Non-Profit

- Cathedral of Our Lady of Angels, Los Angeles, CA (\$250 million)

Deirdre Margolias, CDS, CIT

Scheduler (As-Needed)

Education

B.A., Business Administration,
Concentration in Economics,
California State University,
Fullerton, CA

Certifications

Construction Industry Technician
(CIT), Sponsored by NAWIC
Education Foundation in
Association with Clemson
University

Certified Document Specialist
(CDS), Sponsored by NAWIC
Education Foundation in
Association with Clemson
University

Training

OSHA 30-Hour Safety
Certification

Primavera Course E202
Expedition for Project Controls

Primavera Course 203 Using
Expedition with Infomaker

Primavera Course 601 Planning
& Scheduling with Project
Planner

Scheduling and P3 Overview
Workshop

NPDES History

BMP Evaluation Training

Deirdre has more than 20 years of experience in construction and program controls, including planning, estimating, forecasting, scheduling, cost control, schedule control, and project reports. She is also an expert in PLA/labor compliance. Most of her experience has been in the public sector where she has assumed a wide variety of duties, including database configuration, job costing, scheduling, and program reporting.

With strong organizational skills and knowledge of state-of-the-art productivity and project control tools, Deirdre is an invaluable team asset. She has been in charge of implementing computer software tools, creating and implementing file systems, creating/producing reports, and monitoring the data input by others. As a scheduler she has been responsible for implementing the Primavera schedule and tracking the progress of projects involving more than 3,000 project segments.

Relevant Experience

Anaheim Union High School District Bond Program, Anaheim, CA

Project Controls Specialist for \$237 million bond program. Responsibilities included: preparing the construction program's monthly report to the District; implementing construction controls communication database; creating custom forms and reports for the construction controls communication database; and assisting in the closeout process.

Fullerton Joint Union High School District, Fullerton, CA

Scheduler and Project Controls Specialist for \$125 million program. Responsibilities included: master schedule preparation for six high schools; pre-construction document records; preparation of monthly report for Bond Oversight Committee and the Board; and preparation of all design phase meeting minutes involving three architects.

Los Angeles Unified School District, Local District D Program, Los Angeles, CA

Scheduler and Document Controls for this program, which included more than 60 projects with a collective value of more than \$85 million. Deirdre's responsibilities included preparing multiple detailed reports and the Contract Fact Sheet, as well as utilizing IFS and PICK Systems.

West Los Angeles College Modernization and New Construction Program, Los Angeles Community College District, Los Angeles, CA

Project Controls Specialist for more than 80 projects with a combined value of approximately \$414 million. These included four projects that will receive LEED certification. Responsibilities included: oversight and maintenance of all project budgets and budgeting information; oversight of invoice processes; creating the master schedule; QA/QC maintenance; cost loading; reviewing, analyzing, and walking the site to confirm contractor schedule submittals for critical path conformance.

Southwest College Modernization and New Construction Program, Los Angeles Community College District, Los Angeles, CA

Served as Project Controls Specialist for more than 75 projects with a combined value of approximately \$440 million. These included four projects that have received LEED Gold and Silver Certification, two more tracking to get LEED Platinum certification, and four modernizations to get EBOM certification.

Jessica Morley, NCARB, LEED GA

Facilities Planner (As-Needed)

Education

Bachelor of Architecture,
California State Polytechnic
University, Pomona

Licenses & Certifications

California Licensed Architect,
License No. C-20107

NCARB, National Council of
Architects Registration Board,
Record No. 70402

LEED Green Associate
(LEED GA), U.S. Green Building
Council

Affiliations

Secretary of the Board

Upland Heritage Community,
historic building preservation
non-profit

Jessica is a licensed architect with over 30+ years of program and project management experience in the construction industry, managing every process and phase of construction from design through closeout and occupancy. A seasoned self-starter with significant experience on large and complex programs and projects in the educator sector, Jessica's core proficiencies include program management, master planning, education specifications, procurement, schedule and budget management, DSA coordination, and project oversight. Jessica has a demonstrated history in working collaboratively with all project stakeholders, such as the owner, design team, municipalities, and county governance, general contractors, and subcontractors, California agencies like Costal Commission and DSA on-site school administrators, and regulatory agencies, to successfully deliver multi-million-dollar programs.

Relevant Experience – Education Sector

Phase 1 and 2 Projects, Measure BB Bond Program (\$148M) – Hacienda La Puente Unified School District

As the program director for the District's Measure BB Phase 1 and 2 Projects, Jessica identified and prioritize overall Phase 1 and 2 Program goals for 21st Century Classroom Improvements. Scope of work includes:

- Develop guidelines District Materials Standards; Guidelines for District Technology Standards; and Guidelines for District power and signal norms.
- Provided individual documented feedback and quality control plan reviews at Schematic Design, Design Development and Construction Document phases Drawing and Specifications.
- Developed Division 01 Specifications for bid packages and Process Standards and flow for the review of Submittals Pay applications and RFI's.
- Developed the Program Responsibilities Matrix.
- Oversee the Development, refine, maintain, and update, as necessary, the Master Schedule for the overall Program.
- Assist in the development of the Contractor prequalification process and conduct qualifications reviews and reports.
- Prepare Weekly and monthly progress reports.
- Make Monthly presentations to the Board of Education regarding the progress on Phases 1 and 2.
- Develop cost effective construction phasing for Phase 1 and 2 projects.
- Attend and facilitate District in opening, tabulating and evaluating bids and bid alternates. Monitor contractor and/or subcontractor contractual submittals for completeness prior to forwarding to District for final review and processing for all Phase 1 and 2 projects.
- Plan, schedule and invite attendees to coordination meetings with all the stakeholders, Architects engineers, District personnel.

Additional Project Experience – Education Sector

- Anaheim Union High School District – Central Kitchen
- Castaic Unified School District – District-Wide HVAC Replacement and Equipment Optimizations
- Lucerne Valley Unified School District – Technology and Fire Alarm Upgrades
- Oro Grande School District – Multiple Projects
- Pasadena Unified School District – Multiple Projects
- Pomona Unified School District – Multiple Projects
- Rowland Unified School District – Measure R Bond Program (\$118M)
- San Marino Unified School District – Various Alterations and Modernization
- Silver Valley Unified School District – New Multi-Purpose Room and Kitchen Addition, Restroom Additions, and Modernizations)
- Snowline Joint Union School District – Baldy Mesa Junior High Modernization

Leslie Sydnor, AIA, LEED AP BD+C

Facilities Planner (As-Needed)

Education

Master of Architecture,
University of California,
Los Angeles

Bachelor of Arts, Architecture,
Yale University

Licenses & Certifications

California Licensed Architect,
License No. C32423

LEED AP BD+C, U.S. Green
Building Council

Affiliations

AIA Los Angeles – Board of
Directors 2018-2021

Board Member, American
Institute of Architects, Los
Angeles Chapter

Member, Association of Women
in Architecture and Design

Leslie is a California Licensed Architect with over 25 years of project management experience focusing on K-12, community college, and university projects, which include new construction, adaptive reuse, modernizations, and building renovations ranging in size from \$100,000 to \$80M. With her extensive understanding of the planning and programming process, as well as building code requirements, Leslie has vast experience in all phases of construction including master planning, programming, design management, constructability review, code analysis, budget management, schedule analysis, construction administration and negotiation, and construction—from on-site mobilization through occupancy and project closeout.

Relevant Experience – Education Sector

Measure E (\$1.5B) and Measure K (\$1.2B) Bond Program Projects – Long Beach Unified School District

- Planning Program Manager on behalf of LBUSD for new construction and modernization projects funded by Bond Measures E and K.
- Led development of the Commissioning Owner's Project Requirements (OPR) document.
- Led development of the District's Education Specifications Update.
- Assisted the Planning Administrator at the program level.
- Performed design management duties including establishing project budget and schedule, architect fee negotiations, directing architect during design, document QA/QC, project value enhancement, and coordinating project bidding with Contracts department.
- Projects include: Millikan HS New Classroom Building (\$19M); Millikan HS Modernization and HVAC Upgrades (\$56M); Keller MS HVAC and Science Lab Upgrades (\$13.3M); Burcham ES Modernization and HVAC Upgrades (\$12.1M)

Measure H Bond Program Projects (\$250M) – Anaheim Union High School District

- Led a team responsible for program and project planning, funding, tracking, Board of Trustee and Citizens' Oversight Committee reports, design management and construction management. Data maintained on Procore.
- Monitored pay applications and percent completion of work, oversee contractual performance of all trade contractors and review contract documents to make sure that all specifications and regulations are being followed.
- Maintain and submit documentation necessary to receive funding from California Storm Water Resource Board Drought Response Outreach Program for Schools (DROPS). CMAA Award for Katella HS DROPS Site Improvement.
- Projects include: Katella High School – DROPS Site Improvement Project (\$12.1M); Dale Junior High School – Modernization and New Construction (\$45.8); District Central Kitchen (\$21M); Anaheim High School – Aquatics Center (\$13M); Cypress High School – Site Improvement Project (\$10.5M)

Various Districtwide Projects – Los Angeles Unified School District

- Planning and programming for multiple projects for four (4) school campuses including multi-purpose rooms, administrative offices, classrooms, HVAC upgrades, roofing, site-utilities, e-Rate upgrades, and district office seismic upgrades.
- Performed code analysis and developed construction document set including details. Responsible for consultant coordination and construction administration.
- Projects include: Los Angeles USD, New High School #2 (\$55M); Los Angeles USD, Central Region High School #15 (\$50M); Los Angeles USD, Gratts Primary Center and Early Education Center (\$33M); Los Angeles USD, Central Region Middle School #5 (\$25M)

Bill Fellers, RA, NCARB

Facilities Planner (As-Needed)

Education

Bachelor of Architecture, North Dakota State University, Fargo, ND

B.S., Architectural Studies, Business Minor, North Dakota State University, Fargo, ND

Licenses & Registrations

Registered Professional Architect, California, #C15217

National Council of Architects Registration Board, #28737

Software

MS Office
MS Project
Primavera/SureTrak
Adobe
Bluebeam Revu
LAUSD COLIN
Windows and iOS systems

Mr. Fellers is a Registered Architect in the state of California, NCARB certified, and has over 35 years of diversified experience in project/development management, government public works and privatization, contract negotiation and management, design, procurement, construction, facility management, computer modeling, marketing, community/investor relations, and business/investment management. His expertise covers a wide variety of projects throughout the U.S. and abroad including education, governmental, mixed-use, commercial, environmental/LEED/CHPS, housing, recreation, retail, hospitality, historic preservation, telecommunication, and medical. He offers vast experience in the scoping and planning of new projects while coordinating the development of these major projects with the appropriate agencies (CEQA, NEPA, DSA, etc.)

Relevant Experience

Project Development Manager, Los Angeles Unified School District, Los Angeles, CA (combined \$278M)

Mr. Fellers is responsible for the scope, schedule, budget, contract planning, and overall success of multiple new and modernization school projects that include comprehensive modifications at McKinley Elementary School (\$90M) and Elizabeth Learning Center (\$134M), Jordan High School RAW & Recreational Improvements (\$10M), South Shores Elementary Magnet School New Classroom Building and Barrier Removal (\$22M), and the New Food Service Building at 7th Street Elementary School (\$6M). He is currently providing Strategic Execution Plan input for the above listed projects and coordinating the same across the Asset Management department regions. In addition, he is providing Design Management for the Manual Arts (\$7M) and Mendez High School (\$9M) Wellness Centers.

University of Hawaii & Mixed-Use Community, Oahu, Kapolei, HI (\$300M)

Mr. Fellers assembled and led the development team for the master planning, community design, financing and construction of this 500-acre mixed-use project which is anchored by the new 150-acre West Oahu Campus of the University of Hawaii, surrounded by a University Village and a 2500 unit residential community.

Florida State University, Panama City National Coastal Research Center, Lynn Haven, FL (\$40M)

Mr. Fellers was the lead executive directing the development of this property-for-property MILCON exchange program with the Air Force. Development of FSU campus, townhomes, apartments, student housing, and a marina was proposed on this former Navy fuel depot bayfront parcel, in exchange for an in-kind contribution of property around Eglin AFB. The planned Florida State University – Panama City National Coastal Research Center was conceived as a research village and campus park for DOD, State of Florida, and private companies' technology development and training in underwater forensics, homeland security, and other coastal related research.

First Baptist Elementary School, Aberdeen, SD (\$1M)

Project Architect. Directed the in-house A/E team in the development of the program, master planning, and conceptual design for this new preschool-12 addition to their existing structure. The 20,000 SF phase 1 included classrooms, library/resource center, science labs, music department, gymnasium/locker rooms, kitchen/concessions, and administrative offices. Phase 2 included senior high classrooms, theater, and athletic fields.

Subhi Murad, SWPPP, PMP, QSP

SWPPP Practitioner (As-Needed)

Education

M.S., Civil Engineering: Project Engineering and Management, California State University, Fullerton

B.S., Civil Engineering, University of Damascus

Certifications

Project Management Professional (PMP), Project Management Institute

Qualified SWPPP Practitioner (QSP) Training. CALSWPPP, Inc.

CAL-OSHA 10/30 Certificate

ASCE – Active Member, American Society of Civil Engineers

PMI - Active Member - Project Management Institute, Orange County Chapter

AACE – Member, Association for the Advancement of Cost Engineering

Software

Microsoft Office Suite
Microsoft Project
Primavera P6
Prolog
Primavera Sure-Trak Project Manager 3.0
PMIS Proliance V 5.70
Building Information Modeling (BIM) software

Subhi is a Certified Professional Project Manager with superior experience in managing diversity of construction programs and projects throughout phases of construction including planning, programming, design, execution, commissioning and closeout. With over 28 years of exceptional experience in managing a variety of projects, Subhi is proactive and utilizes a hands-on, problem-solving management approach with a positive attitude. Subhi's experience includes planning and scope initiation of new construction and modernization projects and coordinating swing space and interim housing planning. In addition, his expertise is in schedule and budget verification and management, quality control, board report draft review, design phasing, change orders and claims negotiations and settlement, as well as risk management, including risk register updates, and risk mitigation measures.

Relevant Experience

Measure E Bond Program, Burcham ES and Keller MS HVAC Replacement & Modernization, Long Beach Unified School District

- Senior Project Manager responsible for the management of HVAC, Technology, and ADA upgrade projects, including management of scope, schedule and budget, and for overall on-site project management
- Program included Lease-Leaseback projects consisting of the installation of a HVAC system in classrooms, offices and support spaces including, but not limited to: upgrades of utility service, accessibility, technology, fire alarm, interior/exterior finishes, lighting and electrical; and tactile signage per the bid specifications

Lakewood High School Modernization, Long Beach Unified School District

- Senior Project Manager for renovations and accessibility upgrades of entire campus
- Project included adding multiple ADA-compliant elevator towers and accessibility bridges between existing buildings
- Rebuild of the school main cafeteria and kitchen facilities including walk in coolers and underground grease clarifiers
- The modernization consisted of transforming all existing school buildings into ADA accessible spaces, remodeling of the entire school restrooms, upgrade of underground utilities, and major upgrade to HVAC, Electrical, Technology, and plumbing Systems

Crozier Middle School, Inglewood Unified School District

- New construction of six (6), two-story structural steel buildings including 44 new classrooms, multi-purpose building, Library, Science and Arts laboratories with a total building area of 104,324 square feet
- Project included demolition and removal of all underground existing utilities, and construction of new utilities including domestic water, fire protection, sewer, gas, storm drain, power lines, low voltage and LAN lines with major coordination efforts with utility companies including DWP, The Gas Company, and city of Inglewood
- Project included new data lines installation inside the new buildings in the air plenums down to data outlets through wire mold installation
- Project has received several industry awards and has been recognized by the Concrete Masonry Association of California and Nevada with consecutive Merit Awards in both Educational Design and Sustainable Design categories

Arturo Alvarez, SWPPP, QSP

SWPPP Practitioner (As-Needed)

Education

B.S. Civil Engineering, University of Southern California, Los Angeles

Certifications & Training

OSHA 10, Occupational Safety and Health Administration, US Department of Labor

Trenching and Excavation, Competent Person, OSHA

Scaffolding and Falsework, Competent Person, OSHA

Qualified SWPPP Practitioner (QSP) and Qualified SWPPP Developer (QSD), California Stormwater Quality Association (Certification in Progress)

Construction Quality Management for Contractors (CQM-C), U.S. Army Corps of Engineers

Affiliations

Construction Management Association of America (CMAA), Southern California Chapter

Software

Bluebeam
Contract Manager
Expedition
Microsoft Project
Microsoft Office
Oracle
Primavera
Procore
Prolog
SureTrak

With over 25 years of dedicated and diversified experience in program, project, and construction management, programming and master planning, design management, schedule and cost management, contract administration, risk assessment and mitigation, project controls and execution, Art is a seasoned and highly qualified program manager with vast experience supporting various K-12 school districts, community college districts, and universities. During his career, Art has served in various senior-level roles where he has successfully managed multimillion-dollar construction bond programs and has consistently delivered large and complex, quality projects, on time and within budget.

Art has a demonstrated history in fostering collaborative relationships with the owner, design professionals, contractors, consultants, third-party regulatory agencies, and other project stakeholders to ensure successful project delivery from design development through construction, and closeout and occupancy. Art is well-versed with public contracting code, as well as DSA, OPSC, CDE, and DTSC requirements and his education sector experience has included the management and oversight of new construction, modernization, renovation, additions, site infrastructure and underground utilities, and HVAC, ADA, seismic upgrades, among several others—utilizing various alternative delivery methods.

Relevant Experience

Project Manager, Los Angeles Unified School District, Los Angeles, CA

- Served as Project Manager for the District's South Region and provided programmatic management and oversight of various multi-million-dollar construction projects and district-wide program initiatives as part of the District's \$23B construction bond program, such as:
 - District-wide Wireless Initiative Program
 - Bell Education and Career Center
 - South Region Elementary School No. 7
 - South Region Elementary School No. 10
 - South Region High School No. 9
- Oversight of planning and design activities, which comprised of scope definition, site analysis, environmental studies, feasibility studies, value engineering and design coordination.

Senior Project Manager, Glendale High School Expansion, Glendale Unified School District, Glendale, CA

- Responsible for planning, design, and construction activities associated with the design-build Glendale High School Expansion project.

Senior Project Manager, Measure E and K – HVAC Modernization Program, Long Beach Unified School District, Long Beach, CA

- Provided management and oversight of construction management team responsible for the lease-leaseback addition of air conditioning units to various school campuses simultaneously, which comprised of work performed on occupied campuses that included selective demolition, abatement, upgrade of SCE service and campus wide electrical systems and the addition of HVAC, energy management systems, LED lighting and lighting controls, classroom and auditorium audio visual systems, ADA compliance, and finishes such as flooring and paint.

June Pena

Project Coordinator (As-Needed)

Education

B.A., Architecture, Woodbury University, Burbank, CA

A.S., Architecture Technology, Los Angeles Harbor College, Wilmington, CA

A.A., Liberal Arts, Los Angeles Harbor College, Wilmington, CA

Certifications

OSHA 30-Hour Certification

Software Proficiency

Bluebeam
Onuma
Primavera/Expedition
Access
AutoCAD
BIM
Microsoft Office Suite
Dropbox

June has 10+ years full time paid professional experience in the construction management industry, nine of which were within the education sector. She is experienced in managing numerous projects at any given time, familiar with DSA, and has the ability to manage the document control process. Project driven, a proven leader with ability to "get it done" on schedule, and budget. High energy, positive attitude, adaptive, flexible, creative, and diligent with an attention to detail. A team player with excellent interpersonal skills with clients, subcontractors, and employees. June has the ability to adapt and learn new software programs, and will acquiescently learn to include all that is required for a repertoire of desired skills.

Relevant Experience

Los Angeles Unified School District (LAUSD), K-12, South Region, Los Angeles, CA

As Project Coordinator conducted thorough construction project document audits to verify project Closeout, and project Certification per DSA guidelines for schools; reviewed and organized all construction phase project documents files; verified completeness of DSA project review process documentation that included DSA stamps, authorizations, approvals, signatures, and dates on all DSA forms, letters, approved drawings, and specifications; reviewed O&M warranty binders for completeness per the District Standards and reported all audit findings to supervisor; contacted A/E firms and assigned deadlines requesting specified documentation for Closeout; delivered complete DSA stamped, signed Record Drawings sets, files, and O&M binders to District Headquarters for Closeout archive.

Rancho Santiago Community College District, RSCCD Headquarters, Santa Ana College (SAC) and Santiago Canyon College (SCC), Santa Ana, CA

Assistant Project Manager for (SAC) New Construction Projects; Science Center and Jonson Student Center Design phases. Facilitate FE selections for procurement and preliminary preparations for relocations. Additional projects include assisting Central Plant Quad Infrastructure, Science Center, Johnson Student Center and Demolition preparation team support, and project management of various Capital Outlay Projects for (SAC) and (SCC). In addition, assisted RSCCD Facilities Design Standards activities

Long Beach City College (LBCC) Carson Campus, Long Beach, CA

As Project Coordinator assisted the Bond Program Construction Management team (BMT); reviewed and processed contractor submittal package submissions; tracked Owner, and A/E submittal review/approval timelines, and expedited approvals to contractors to meet critical path activity schedule; prepared/reviewed change orders, and pay apps for completeness, and expedited processing; reviewed record drawing construction sheets to identify FF&E procurement items, and verified scheduled activities; recorded daily construction site activities via digital photo documentation; organized electronic/hard copy project files that included construction document drawings, O&M binders, warranties, and construction milestone documentation; coordinated project meetings, and drafted weekly construction meeting minutes.

Laila Hussain

Project Coordinator (As-Needed)

Education

English Major, Focus in Creative Writing, University of California, San Diego

General Education Certificate, Fullerton College

Laila has more than 15 years of experience providing project coordination, QA/QC management, and document controls support. Her advanced proficiency in software programs includes IFS, QCBD, and multiple proprietary customer ERP and SAP systems. Laila is a highly productive, time-efficient, detail-oriented team member with superior verbal and written communication skills. Her experience, as well as her strong ability to adapt, organize, and multi-task, ensures projects stay on track and on budget.

Relevant Experience

Quality Assurance Specialist/Project Coordinator, District-wide Projects, Los Angeles Community College District, Los Angeles, CA

- Provide general/technical administrative support to the QA/QC department.
- Provide support as needed to the Risk Management Team
- Assist with monthly/quarterly/semi-annual/annual Reports
- Support team to verify Standard Operating Procedure requirements are accurately portrayed, and gather information as required
- Provide assistance following up with various departments on QA/QC administrative matters
- Assist in tracking and updating required uploaded information is current
- Create meeting agendas and meeting minutes
- Provide assistance with Lessons Learned process and database
- Input/track/maintain forms report

Quality Assurance Specialist, Aluminum Precision Products, Santa Ana, CA

- Facilitate and provide analytics for quarterly executive management review meeting and take meeting minutes
- Facilitate yearly 3rd party, AS9100, and Nadcap audits
- Responsible for completion of all 3rd party audit CARs, as well as the resulting analysis and continual improvement activities
- Facilitate customer audits and source inspections
- Responsible for completion of customer-requested corrective actions
- Schedule and facilitate the weekly Management Review Board meeting and take minutes
- Update database with action items and product dispositions
- Work directly with inspection departments to identify, contain, and fully resolve product issues
- Work directly with customers and vendors to resolve product and process quality issues
- Liaise with management to coordinate internal, companywide projects
- Liaise with IT to incorporate automated, paperless systems
- Create, control, and revise company procedures, work instructions, and forms
- Ensure that internal procedures and policies are flowed down and adhered to companywide
- Work across departments to address administrative and quality issues and expedite resolutions
- Facilitate Q.A. recruiting and onboarding activities. Train and supervise Q.A. personnel
- Distribute quality updates and alerts companywide
- Facilitate and conduct quality training companywide, such as FOD prevention and FSP awareness

Kimberly Emerson

Project Coordinator (As-Needed)

Education

B.A., Political Science, California
State University, Fullerton

Training

OSHA 30-Hour Training

Software

ERP System
Microsoft Office Suite

Kimberly has more than 20 years of experience providing contract administration, project coordination, general administration, and accounting activities in support of projects and programs. She is a skilled and resourceful project engineer, specializing in invoicing procedure, accounting and financial analysis. Her strong abilities with computer software, project organization and budgeting, make her a great asset to each of her project teams.

Kimberly's responsibilities typically include open and transparent communications with vendors and project controls staff to ensure payments are processed promptly, fostering an environment where vendors want to work with us and our clients again. With a thorough understanding of numbers and in dealing with vendors, Kimberly is able to interpret the viability of invoices, in compliance with the contract, to keep a project running smoothly.

Relevant Experience

Los Angeles Unified School District, Various Projects, Los Angeles, CA

Served as Project Administrator III for the LAUSD multi-year bond program. Summary of duties includes:

- Organized scanning of all documents for closed schools, including meeting with scanning vendors, researching prices, and approving invoices
- Developed spreadsheets for scanning inventory, including accountability metrics
- Troubleshoot problems with timely delivery of invoices and change orders
- Coordinated and staffed Construction Dept. booth at Construction Expo
- Organized charity drive for Construction Department, raising \$2,000

Los Angeles Unified School District and Inglewood Unified School District, Los Angeles County, CA

- Served as Project Administrator in support of two multi-year school district programs
- Analyzed and researched budgets, and processed invoices and change orders for contractors through entire LAUSD invoice system
- Researched and documented all spending in construction program of Inglewood USD, and developed spreadsheet to track all expenditures
- Trained incoming Project Coordinators and organized onsite construction offices

Los Angeles Community College District, Bond Program, Los Angeles, CA

Served as Project Administrator and Financial Analyst on this multi-year bond program. Summary of duties includes:

- Analyze all invoices for adherence to contract, review contract for specific accounting provisions, review all invoices for accounting and paperwork, ensure that invoices are within allotted budget of contract, and apply accounting coding
- Work with outside vendors to resolve invoicing disputes
- Track time and payment of all invoices in internal and district-wide databases
- Work with project managers to ensure payment of invoices matches services rendered

Section 2

Experience

3.2.1. Provide a brief description of the firm's experience for both New Construction and Modernization projects. At a minimum, identify the number of years of experience in the applicable fields.

Since its inception in 1996, Cumming has provided project and construction management services and has been on Engineering News-Record's list of the top CM-for-fee management firms in the country for 12 of these years. Our entire business is based on providing construction, project and program management, and other related consulting services to project owners, with public agencies being our largest client constituency and California being our largest market.

With first-hand experience providing these services for California K-12 school districts, Cumming is intimately familiar with the processes and procedures, best practices, and project requirements associated with California public education construction programs. We recognize the importance of the District's program and are confident of our ability to bring added value to your projects given our experience, strength of our team members, and past performance history supporting K-12 district programs and projects.

Our project experience includes the completion of thousands of assignments in support of owners from pre-construction to closeout and occupancy for classrooms, laboratories, performing art centers, libraries, specialty training facilities, food service, housing, administrative space, parking, and athletic facilities – among many others. We make all of our resources and experience available to you, as needed throughout the project, to ensure its success.

Modernization & New Construction

For nearly 25 years, Cumming has developed extensive experience with both modernization and new construction projects, particularly for K12 districts throughout California. Both types of projects require confident leadership, honest and clear communication, and a persistent attention to detail and responsibility, particularly in the areas of schedule, cost, scope, and quality. How we manage the project does not change depending on the project type.

That said, the challenges we encounter, and the situations and project requirements that must be taken into account, are different among project types. For a modernization project, for example, we are often dealing with occupied facilities, which can be an enormous challenge if not handled correctly. Similarly, whereas new construction offers a "blank slate" in terms of constructing the facility itself, modernization projects require that the work being done complements the existing facility so that the facility is a unified, seamless space upon completion.

New construction comes with a different set of challenges, including higher regulatory hurdles, increased community scrutiny, higher project budgets, and longer project timeframes. While our management style is consistent from project to project, Cumming takes all of these issues—along with many, many others—into account depending on the type of project we are working on.



**The delivery of
each project
on-budget,
on-schedule, and
on-quality is our
primary goal for
every client.**

3.2.2. Project Listing. List all K-12 school projects that firm has worked on within the last three (3) years. Limit response to no more than the then (10) most recent projects. Each project description should include a brief scope of work, and a client contact by name, agency, title, and phone number who may be contacted for verification.

California K-12 Project Experience

Cumming has been providing program, project, and construction management services to California public education clients for more than 25 years, during which time we have worked on more than 2,500 K-12 projects, as well as more than 700 public community college and university projects. Nearly all of this work has been completed in the State of California, providing us with an unmatched level of experience here in the State. Collectively, our education portfolio accounts for more than \$20 billion in construction.

Cumming currently manages some of the largest construction bond programs in the world, including the \$20 billion Los Angeles Unified School District Bond Program, the \$6 billion Los Angeles Community College District Bond Program and the \$2 billion Long Beach Unified School District Bond program. With our rich history of providing construction management and support services to California educational clients, we possess superb educational facility expertise, local knowledge, local bond management expertise, state-of-the-art management tools and a complete understanding of compliance with DSA requirements for local school construction. We will make all our resources and experience available to you, as needed throughout the project, to ensure its success.

Our experience includes program, project, and construction management assignments for more than 50 school districts throughout California, including:



Partial Listing of California Public K-12 Clients

Anaheim Elementary SD	Fullerton Joint Union HSD	Los Angeles USD	San Diego USD
Anaheim Union HSD	Garden Grove USD	Newport-Mesa USD	San Gabriel USD
Baldwin Park USD	Glendale USD	Norwalk-La Mirada USD	Santa Ana USD
Beverly Hills USD	Hacienda La Puente USD	Orange USD	Santa Monica-Malibu USD
Carlsbad USD	Huntington Beach USD	Palm Springs USD	Torrance USD
Compton USD	Lake Elsinore USD	Pasadena USD	Tustin USD
El Monte UHSD	Long Beach USD	Riverside USD	William S. Hart UHSD

Project Specific Experience

A list of K-12 school projects, completed or active, in the past three years, for which Cumming provided program and construction management services, is included on the following pages. With our history of providing construction management and support services to California educational clients, we possess expertise, local knowledge, local bond management expertise, state-of-the-art management tools and a complete understanding of compliance with DSA requirements for local school construction.

Project Name, School District & Location	Scope of Projects and Description of Services Provided	Project Value	Project Duration	Contact Info
Project Name: Roosevelt Elementary School Reconstruction Project School District: Anaheim Elementary School District Location: Anaheim, CA	Scope: Modernization, Reconstruction and New Construction Delivery Method: Lease-Leaseback Description: Cumming is providing project management services for the Roosevelt Elementary School reconstruction project. The project will include the construction of new classroom buildings, construction of administration offices, and other support facilities; construction of new parking lots, student loading areas, and associated on-and off- site work.	\$45,000,000	December 2018 – Anticipated completion December 2020 (Extended due to Covid-19)	Contact Person: Isela Vasquez Title: Senior Director of Facilities Planning Phone Number: 714-517-7549 Email: ivazquez@aesd.org
Project Name: Reconstruction and Modernization of Sunkist Elementary School School District: Anaheim Elementary School District Location: Anaheim, CA	Scope: Modernization, Reconstruction and New Construction Description: Cumming is currently providing project management and support services for the reconstruction and modernization of Sunkist Elementary School. This will provide students and staff with a state-of-the-art facility to replace existing outdated buildings. The new building will stand 2 stories with 41 teaching stations. This \$39M project includes both modernization and new construction of a K-6 elementary school on a 9.64-acre site in Anaheim, CA. Scope includes Construction of two new buildings, modernization of 2 existing buildings; new site work with accessible parking, playfields, hardscape, landscape, underground utilities, path of travel, and lighting; and new masonry trash enclosure.	\$41,194,914	October 2018 – Anticipated completion December 2020 (Extended due to Covid-19)	Contact Person: Isela Vasquez Title: Senior Director of Facilities Planning Phone Number: 714-517-7549 Email: ivazquez@aesd.org

Project Name, School District & Location	Scope of Projects and Description of Services Provided	Project Value	Project Duration	Contact Info
Project Name: John Adams Middle School Performing Arts Center (JAMS PAC) School District: Santa Monica Malibu Unified School District Location: Santa Monica, CA	Scope: Reconstruction and New Construction Delivery Method: Lease-Leaseback Description: Cumming is providing project management services for the new 2-story 35,000 SF performing arts center which includes a 750-seat hall, stage, back of house spaces for storage, dressing rooms, restrooms, and choir classroom. Included in the project is a separate rehearsal room with supporting spaces for ticket sales and an exterior hardscape terrace and landscaping. The project also includes modernization and seismic upgrade of the adjacent 5600 SF music building, Building J and other associated improvements.	\$25,000,000	May 2019 – Anticipated completion June 2021	Contact Person: Steve Massetti Title: Bond Program Manager Phone Number: 310-450-8338 X79389 Email: smassetti@smmusd.org
Project Name: New Compton High School School District: Compton Unified School District Location: Compton, CA	Scope: Reconstruction and New Construction Delivery Method: Lease-Leaseback Description: Cumming is providing project management for the New Compton High School Project. The new construction of the northwest section of the Campus consists of demolishing the buildings and adding three (3) softball fields, upgrading the existing baseball field, relocating the 400m track from southeast of the Campus to northwest of the Campus adjacent to the baseball field, adding softscape and hardscape, and relocating the 190-space North Parking Lot further north. The new construction of the southwest section of the Campus consists of adding six (6) full tennis courts (43,200 square feet); five (5) basketball courts (29,650 square feet), two (2) soccer fields (85,310 square feet); terraced landscape seating (33,510 square feet) and 43,600 square feet of grass landscape.	\$118,000,000	Summer 2018 – Anticipated completion Summer 2023	Contact Person: Nate Holt Title: Chief Facilities Officer & Bond Program Manager Phone Number: 310-639-4321 Email: nholt@compton.k12.ca.us

Project Name, School District & Location	Scope of Projects and Description of Services Provided	Project Value	Project Duration	Contact Info
Project Name: Measure B Bond Program and 21st Century Classrooms (Phase I and II) School District: Hacienda La Puente Unified School District Location: La Puente, CA	Scope: Modernization, New Construction, Access Compliance Description: Cumming is providing project management services for the Districts Measure BB bond program. The bond program will provide students and the community with improved and upgraded school facilities that are safe, secure and technologically updated. Additionally, Cumming is providing construction management services for the Districts Phase I and II bond projects which includes: 21st century classrooms for several school sites, including classroom finishes; Upgrades to classrooms and technology and communications career education and advance science courses required for college and university admission; Upgrades to the Districts infrastructure systems, classroom and teaching equipment to enhance instruction; Upgrades and expansion of wireless systems, telecommunications and network connections; Improvements to student and campus security, which includes classroom locks.	1. Nelson Elementary School (\$3,551,694.00) 2. Los Altos Elementary School (\$3,482,397.00) 3. Workman Elementary School (\$2,692,717.00) 4. Cedarlane K-8 Academy (\$4,366,440.00) 5. Mesa Robles K-8 School (\$4,856,497.00) 6. Newton Middle School (\$4,102,158.00) 7. Sparks Middle School (\$5,026,269.00) 8. Grandview College Prep Academy (\$6,253,607.00) 9. Mesa Robles Interim Housing (\$1,559,168.00) 10. Cedarlane interim Housing (\$1,213,672.00) 11. Newton Interim Housing (\$677,197.00) Total: \$ 37,781,816	July 2019 – On-going	Contact Person: Joel Duarte Title: Director of Purchasing Phone Number: 626-933-3932 Email: jduarte@hlpusd.k12.ca.us
Project Name: Garfield ES, Webster ES and Stephens MS HVAC Upgrades, Interim Housing and Modernization Projects School District: Long Beach Unified School District Location: Long Beach, CA	Scope: Modernization, Access Compliance, Renovation and Addition Description: Cumming provided overall project management for the Garfield Elementary, Webster Elementary and Stephens MS Projects which included interim housing, HVAC upgrades, fire alarm system upgrade, utility and electrical service upgrades, ceiling & lighting upgrades, ADA upgrades, technology & interior finish upgrades.	Garfield ES – \$22,000,000 Webster ES – \$4,900,000 Stephens MS - \$23,000,000	January 2018 – Ongoing	Contact Person: Alan Reising Title: Business Services Administrator Phone Number: 562-997-7550 Email: areising@lbcschools.net

Project Name, School District & Location	Scope of Projects and Description of Services Provided	Project Value	Project Duration	Contact Info
Project Name District Summer Projects 2018 School District Newport-Mesa Unified School District Location Newport Beach, CA	Scope: Modernization and Access Compliance Description: Cumming provided project management and oversight of various HVAC replacement and modernization projects occurring simultaneously throughout eight (8) elementary schools. Scope included HVAC equipment upgrades to VRF systems, selective demolition, underground plumbing, new ductwork, roofing patch back, asphalt paving, concrete footings and curbs along with pads and SOG, new handrail, site fencing with ADA and vehicle gates, fire alarm, low voltage, new outlets and light fixtures, painting, doors and doorframes, aluminum storefront, glazing, casework and countertops, ceramic tile, modifications to restrooms to meet ADA requirements, new floors, abatement, interior framing, drywall, interior wall framing, LVT and carpet flooring.	\$16,933,733 (total for all 8 projects)	June 2018 – October 2018	Contact Person: Ara Zareczny Title: Administrative Director II, Facilities Development, Planning and Design Phone Number: 714-424-8934 Email: azareczny@nmusd.us
Project Name: Summer Projects 2018 Project 1: Gauer and Stoddard Elementary School – Classroom and Site Improvements Project 2: Ross and Loara Elementary School – Classrooms, Single point of Entry, New Parking Lot and New Playground School District: Anaheim Elementary School District Location: Anaheim, CA	Scope: Modernization and Access Compliance Description: #1: Gauer and Stoddard ES: Scope of work includes clearing and grubbing area for installation of 8 new modular buildings, 4 each at both Gauer and Stoddard. Excavated and compacted subgrade as needed. Poured concrete foundations, craned buildings into place and connected buildings to existing utilities, including: water, sewer, electrical, fire alarm and low voltage systems. In addition, installed a new fire-hydrant; hot-tapped into city water supply, installed double check valves, and certified the installation. Made ADA improvements to existing bathrooms and new ADA paths of travel. Loara Elementary School: Demolition of old playground equipment, and installation of new playground at new location. Restored irrigation system and placed over 15,000 square feet of sod. #2: Ross Elementary School: Demolition of existing playground and adjacent field and construction of a new 56 car ADA compliant parking lot and connecting ramps and flatwork. Created single point of entry to school by modifying ADA path of travel and installing multiple accessible ramps. Cleared, grubbed, compacted and placed asphalt concrete for subsequent placement of 9 modular classrooms. All buildings were connected to existing site utilities, including water, sewer, electrical, fire alarm and low voltage systems. Constructed a new playground and running track. In addition, added new landscaping throughout the site, made ADA upgrades to multiple bathrooms and created a new Monument sign at the front of the school.	#1: \$2,241,074.96 #2: \$2,995,750.00	June 2018 – September 2018	Contact Person: Isela Vasquez Title: Senior Director of Facilities Planning Phone Number: 714-517-7549 Email: ivazquez@aesd.org

Project Name, School District & Location	Scope of Projects and Description of Services Provided	Project Value	Project Duration	Contact Info
Project Name: Anaheim High School Aquatics Center School District: Anaheim Union High School District Location: Anaheim, CA	Scope: Demolition, New Construction Description: Construction of a new \$38M swimming pool and bleacher, construction of new 2,600sqft pool equipment building, renovation of girls' and boys shower/locker rooms (8,700sqft each), modernization and renovation of existing coaching staff offices, construction of five (5) new basketball courts, miscellaneous hardscape and landscape improvements including fire lane, new decorative and chain link fencing at the site perimeter and on the athletic fields. Project includes demolition of existing basement equipment, abatement and demolition of existing grandstand stadium.	\$12,959,323	August 2018 – December 2019	Contact Person: Patty Neely Title: Director of Facilities and Planning Phone Number: 714-999-5454 Email: neely_p@auhsd.us
Project Name: Orange High School Site Utility and Infrastructure School District: Orange Unified School District Location: Orange, CA	Scope: Modernization, Addition, demolition and Access Compliance Description: Cumming provided construction management for Orange High School at OUSD. Scope included site utilities and infrastructure upgrades, new satellite kitchen, new medically fragile bus drop-off, new electrical utility yard and relocate (5) and demolish (4) of existing portable classroom buildings. The project also included a Science Center, which featured 12 laboratory rooms, 1 general classrooms, new panther pavilion plaza, new fire lanes, and 2 medically fragile classrooms.	Site Infrastructure \$6,000,000 (Increment #1) STEM Building \$28,000,000 (Increment #2)	January 2017 – February 2019	Contact Person: Scott Harvey Title: Senior Executive Director Administrative Services Phone Number: 714-628-4585 Email: sharvey@orangeusd.org

3.2.3. Project Team. Identification of the firm's project team and their specific expertise, experience, and resources to ensure suitable completion of the work. Indicate the key team members that will serve as lead management and project manager and will be principally responsible for working with the District. For these key team members specifically, identify all public works projects and California school projects in particular that team member has worked on in the last three (3) years.

We are proposing the following key project team members for the District's modernization and new construction projects. Our proposed personnel are fully versed in construction management services from preconstruction and planning to project close-out and occupancy. For additional resources, this team also has the full support of our in-house team of project and construction management professionals in our local office, including project and construction managers, cost managers and estimators, schedulers, value engineers and constructability reviewers, LEED and sustainability specialists, ADA experts, dispute resolution and avoidance experts, and more.

Anthony Sanchez will be principally responsible for working with the District and will serve as the Project Executive for the District's projects. He will be supported by the Senior Construction Managers, Construction Managers, and Project Engineers listed in the chart below. The specific requested experience of these key team members is detailed in the chart.

We have provided full resumes detailing the qualifications, certifications, and experience of the proposed project team—including these key team members and as-needed staff—in Section 3.1.3, per the RFQ requirements.

Project Team Qualifications

Key Personnel / Position	Relevant CA Project Experience
Anthony Sanchez, RME, DBIA Assoc. Project Executive	- Anaheim Elementary School District - Anaheim Union High School District - Compton Unified School District - Glendale Community College District - Glendale Unified School District - Hacienda-La Puente Unified School District - Long Beach Unified School District - Los Angeles Community College District - Los Angeles Unified School District - Newport-Mesa Unified School District - Norwalk-La Mirada Unified School District - Orange Unified School District - Pepperdine University - Rancho Santiago Community College District - San Diego Unified School District - Santa Monica-Malibu Unified School District - South Orange County Community College District
Antonio Salcido, CCM PMP Sr. Construction Manager	- Benton and Covallis Middle School Landscape Renovation and Accessory Structures, Norwalk La Mirada Unified School District, Norwalk, CA - La Mirada High School Gymnasium Renovation, Norwalk La Mirada Unified School District, Norwalk, CA - Various Measure H Bond Program Project, Anaheim Union High School District, Anaheim, CA - LAUSD 75 ADA Access Compliance, Various District-wide Projects, Los Angeles Unified School, Los Angeles, CA (\$20M) - Multiple District-wide/JOC Projects, Los Angeles Unified School District, Los Angeles, CA
Dan Franco Sr. Construction Manager	- Measure BB Bond Program, Hacienda La Puente Unified School District - Various Districtwide Projects, Pomona Unified School District - Roosevelt Elementary School Expansion and Modernization (\$45M), Pomona Unified School District - Washington Elementary School Expansion and Modernization (\$43M), Pomona Unified School District
Kurt Supinger, PE Sr. Construction Manager	- Utility and Tenant Improvement Projects, Pepperdine University, Malibu, CA (\$38M) - Pierce College, Los Angeles Community College District, Los Angeles, CA (\$24M)



Key Personnel / Position	Relevant CA Project Experience
Raymund Hillis Construction Manager	- Theodore Roosevelt Elementary School Reconstruction Project, Anaheim Elementary School District (\$45M) - Clinton and Warren Elementary School, HVAC Modernization (\$7.8M), Garden Grove Unified School District - Pacifica High School Seismic Project (\$45M), Garden Grove Unified School District - Automotive Modification (\$2.4M), Diane Watson Career Training Center, Los Angeles Unified School District - Kitchen Expansion Project (\$3.8M) Elizabeth Learning Center, Los Angeles Unified School District - New and Retrofit HVAC Projects, Los Angeles Unified School District - New Intrusion, Alarm, Public Address and Computer Systems Projects, Los Angeles Unified School District
Joel Shrader, PMP, LEED AP Construction Manager	- Reconstruction and Modernization of Sunkist Elementary School, Anaheim Elementary School District - Gauer and Stoddard Elementary School, Classroom and Site Improvements, Anaheim Elementary School District - Ross and Loara Elementary School – Classrooms, Single Point of Entry, New Parking Lot and New Playground, Anaheim Elementary School District - Various District-wide Projects, Los Angeles Unified School District
Dale Frisby Construction Manager	- Los Angeles Unified School District, Various Districtwide Projects, Los Angeles, CA - San Jacinto Unified School District, Various Districtwide Projects (\$90M), San Jacinto, CA - Glendale Unified School District, Various Districtwide Projects (\$180M), Glendale, CA
Louis Ramos, CCM LEED AP BD+C Construction Manager	- La Mirada HS Gymnasium Expansion, Norwalk La Mirada Unified School District - Phase I & Phase II Projects, Hacienda La Puente Unified School District - Construction and Renovation Program, Los Angeles Unified School District (\$27B) - Modernization and Repair Program, Los Angeles Unified School District (\$7.6B)
Elva Bravo Project Engineer	- Roosevelt and Sunkist Elementary Schools Reconstruction and Modernization Upgrades, Anaheim Elementary School District - Burcham Elementary School and Keller Middle School HVAC Upgrades and Modernization, Long Beach Unified School District - Financial Aid Relocation, Information Technology Building, Core Performance Center and AET & KCRW, Santa Monica Community College District
Paige Lawrence, CCM, EIT Project Engineer	- James Madison Elementary School, HVAC Project, Long Beach Unified School District - Lakewood High School Campus Wide HVAC Installation, Long Beach Unified School District - James Garfield Elementary School, HVAC project with Alterations, Long Beach Unified School District
Juan Bermudez Project Engineer	- Site Wide HVAC Installation and Improvements, Madison Elementary School - Long Beach Unified School District - New Auditorium Ramp and Kitchen Restroom Upgrade, Keller Middle School - Long Beach Unified School District - Demolition of Classrooms, Site Improvements and Installation of Portable Classrooms, Stephens Middle School - Long Beach Unified School District - Campus Wide HVAC Installation and Site Improvements, Webster Elementary School, Long Beach Unified School District - Campus Wide Landscape Renovation and Concession Building, Norwalk-La Mirada Unified School District - Campus Wide Landscape Renovation and Accessory Structures, Corvallis Middle School, Norwalk-La Mirada Unified School District - Balboa Elementary School, Glendale Unified School District - RD White Elementary School, Glendale Unified School District - Verdugo Woodlands Elementary School, Glendale Unified School District

3.2.4. Public Works Requirements. A brief summary description of firm's familiarity with applicable laws and requirements for public works projects in general and K-12 California school projects in particular, including OPSC State Funded Projects.

Experience with Public Regulatory Agencies

Cumming has extensive experience in the K-12 sector and have completed over 2,500 K-12 projects nationwide. We have supported modernization/renovation projects, new construction, facility replacements, master planning efforts. We are familiar with the requirements of the Office of Public School Construction (OPSC), California Department of Education (CDE), and Division of the State Architect (DSA), Uniform Building Code (UBC) and Title 24 of the California Code of Regulations.

Office of Public School Construction

Because we have been performing project/construction services for so many years, we are able to build excellent working relationships with all of the State agencies that govern public school construction. This includes the Office of Public School Construction (OPSC). Our close and repeated work with the OPSC— hundreds of projects to date — has given us a deep understanding of their various funding opportunities, which include New Construction Grant, Modernization Grant, Career Technical Education Facilities Program, Overcrowding Relief Grant Program Funding, High Performance Incentive Grant, Local Rebates, and other Incentives and Grants.

California Department of Education

Through working on hundreds of educational projects throughout California, we are deeply familiar with the California Department of Education and have had former team members involved in the authorship of the "Grid Neutral Schools" section of the California Department of Education's "Schools of the Future" initiative.

Uniform Building Code

The Cumming team is involved at the highest level of the building codes through commitment to various associations within our industry. We are involved in teaching classes and code development, and we serve on numerous committees and boards for organizations in the building code enforcement industry. Our experts are knowledgeable and experienced in the latest in code technology for Uniform Building Code (UBC). We can answer your questions on the California codes, the Legacy Uniform codes, and the International Code Council Code (ICC) family of codes. The Cumming team will provide unbiased recommendations and background information to help you make informed decisions on code-related issues or understandings.

Title 24 of the California Code of Regulation

Cumming is proficient in providing Public Agency Owners with guidance, training, and compliance expertise in the area of Title 24 of the California Code Of Regulations interpretation. Cumming currently provides this service for other projects for the Judicial Council of California through our energy project management contract, as well as for

the Los Angeles County Metropolitan Transportation Authority. Our engineers oversee compliance for all major rail projects within LA County. Our work includes field auditing, documentation verification, policy review, technical updates for compliance to the latest CALGreen code requirements.

Experience with DSA Processes & Standards

Cumming's extensive experience in the California K-12 sector has given us the opportunity to understand the complex nature of working with State Regulatory Agencies such as the Division of the State Architect (DSA) and California Department of Education (CDE). Early communication and a spirit of collaboration are keys to success with both agencies.

At the outset of a school project, be it modernization or new construction, contact should be made with CDE to ensure that the project meets design standards and other requirements for scope of work, site size, types and location of classrooms, site access, parking, etc. Quick response to questions about submittals makes for a smooth approval and eventual funding eligibility for the project. CDE staff is often dedicated to a district or region making communication relatively easy.

Similarly, with DSA, early communication helps to facilitate a successful project. Cumming has a thorough understanding of the processes and procedures required with regards to plan review, code interpretation, testing and inspection, construction phase changes, and project certification. Over the years we have developed positive working relationships with DSA staff with many of our team members being on a first-name basis with DSA plan checkers and administrators.

At the outset of a project, we make it a priority to schedule a pre-submittal meeting with DSA representatives to introduce the project, communicate the project scope and design approach, and review any code-related questions or concerns. This meeting establishes a spirit of collaboration for the team and provides a roadmap for the design review process. As we proceed through the development of the design of each project, our managers continue to direct the collaboration with DSA to ensure that the design is tracking in a timely manner and that code requirements and agency expectations are being met.

Cumming's efforts do not stop with DSA plan approval. Project certification begins on day one of construction. Establishing a positive working relationship with the DSA field engineer is key to heading off any issues that may occur during construction. Our managers engage in regular communication with the design team to confirm that construction changes to the approved design (CCDs) are submitted in a timely fashion, and frequent review of the DSA Box for inspector of record (IOR), special inspection, and testing lab reports. Our management of the construction documentation process helps to move the project towards a timely certification. Our team members have successfully closed out projects in under 30 days and have achieved DSA certifications within 180 days by being proactive and persistent with follow-through on the required documentation.

3.2.5. *District Contracts. Provide a schedule of all Newport-Mesa Unified School District contracts held within the last three (3) years, including with respect to each project, the project name and the property address, the contract amount, and firm's contact person at the District on said project.*

Project Management

District Summer Projects 2018 – HVAC Replacement and Modernization (8 campuses)

- Wilson Elementary School – 801 W Wilson St., Costa Mesa, CA 92627
- Mariners Elementary School – 2100 Mariners Dr., Newport Beach, CA 92660
- Newport Heights Elementary School – 300 E 15th St., Newport Beach, CA 92663
- Kaiser Elementary School – 2130 Santa Ana Ave., Costa Mesa, CA 92627
- Woodland Elementary School – 2025 Garden Ln., Costa Mesa, CA 92627
- College Park Elementary School – 2380 Notre Dame Rd., Costa Mesa, CA 92626
- Davis Magnet Elementary School – 1050 Arlington Dr., Costa Mesa, CA 92626
- Pomona Elementary School – 2051 Pomona Ave., Costa Mesa, CA 92627

Total Project Management Contract Amount: \$308,045

Cost Estimating

- Estancia High School New Aquatic Center – 2323 Placentia Ave., Costa Mesa, CA 92627 – \$37,780
- Corona del Mar High School New Athletics Complex – 2101 Eastbluff Dr., Newport Beach, CA 92660 – \$19,900
- Fencing & Security Upgrades at Newport Heights ES, Wilson ES, and Mariners ES – \$4,200
- DSA level cost estimates for HVAC upgrades at 6 school campuses (College Park ES, Davis Magnet ES, Kaiser ES, Pomona ES, Wilson ES, and Woodland ES – \$36,750
- Estancia High School New Theater – 2323 Placentia Ave., Costa Mesa, CA 92627 – \$62,625
- Corona del Mar Middle and High School Access Upgrades – 2101 Eastbluff Dr., Newport Beach, CA 92660 – \$7,730
- Ensign Intermediate School Security Project – 2000 Cliff Dr., Newport Beach, CA 92663 – \$7,730

Total Cost Estimating Contracts: \$176,715

Firm's Contract Person at the District:

Ara Zareczny, Administrative Director II, Facilities Development, Planning and Design
Phone Number: 714-424-8934



Section 3

Project and Cost Management

3.3.1. Project Management. Describe the project management procedures employed by your firm to minimize change orders and ensure well-coordinated and complete work product. Include the following information:

Project/Construction Management Approach

Cumming specializes in construction management. As a result, we have developed efficient and effective approaches to working with your current staff, architect-engineers, and contractors to successfully complete quality projects on time and within budget. The critical factors to successful program include:

- Well-defined goals and milestones
- Extensive, thorough early planning
- Good leadership, management, and supervision
- Positive and effective relationship with end-users
- Proper project team chemistry
- Quick response to changes/adaptive to potential funding changes or requests
- Engineering managers concerned with the total project, not just the engineering elements

Our work plan will offer a defined approach to take each project from its current state through completion of all construction, closeout, and initial occupancy activities.

Construction and Closeout Phase Methodology During Construction Phase

We first hold a pre-construction meeting where the lines of communication will be delineated and individual responsibilities will be defined. Our team will work closely with your staff to ascertain the constraints that your project will face, to ensure all schedule and safety issues are addressed in the bid package and reviewed at the initial meeting. Typical concerns that must be addressed during construction include construction phasing, maintaining paths of travel around construction zones, scheduling of certain contractor activities that may impact the site, noise and dust control, vehicular access and parking, contractor staging areas, and coordination of utility shut-downs, if needed.

We will also work diligently to keep you updated on progress and apprised of forecasted activities. Our team will become familiar with the general conditions and technical sections of the contract specifications and verify that the provisions of the contract are clearly understood and enforced during the construction phase. We will log and track project correspondence, project submittals, requests for information (RFIs) and other project documentation.

Cumming will produce daily project activity reports, take progress photos, and verify all completed work for inclusion in contractor progress payments. All contractor RFIs that require interpretation of plans or specifications will be reviewed with the architect of record. Proposed changes

in the work will be evaluated with the architect. Cumming will track and monitor all change requests received from the contractor through the District's document control system. With the architect, we will review the scope of the contractor's change order proposal to determine if the work is a change from the base contract. If so, we will negotiate an equitable cost with the contractor for recommendation. Our team has successfully utilized unit pricing strategies in the bid packages to control costs of changes in the work.

To alleviate potential deadlocks, we also recommend that the general conditions of the contract include provisions for pricing changes according to publications such as Means Construction Cost Data and Saylor Publications, Inc., in support of current and local market conditions to facilitate agreement on labor rates. Cumming representatives will attend and keep minutes of the job site meetings with the contractor and project architect. Regular agenda items for weekly progress meetings will include contract status for schedule and budget, forecasted construction activities, contractor field issues, owner and site administration concerns; submittal status, change order status, Request for Information status, and planned activities and coordination issues. Our team and architect will discuss any delays or anticipated impacts to the contractor's work where necessary. We will direct the contractors to develop recovery schedules and avoid disruption to ongoing education programs.

All of these issues will be tracked within the District's project controls system, and reports of action items will be regularly distributed and discussed at project meetings. During the construction phase, we actively manage the site and develop good communications with the field personnel so that we become aware of conflicts as they arise and ensure that timely and concise RFIs are issued by the contractor. We support the consulting team by reviewing the site conditions and provide a photo if a site visit is not scheduled to facilitate a prompt response. We also ensure that the design team's answer is to the point so that the contractor can move forward with a clear understanding and direction if there is a change to the project that has a cost impact.

Contractor Progress Payments

We will routinely review the status of completed work prior to contractor payment requests. Using an approved schedule of values submitted by the contractor before the first payment request, Cumming will accompany the contractor's site representative to verify all completed work under the contract. The agreed amount of completed work will be reflected on each line item in the schedule of values. This information will be input into an approved progress payment application form generated for signature to the architect, contractor, and owner's representative. Our team will review the project payment application and verify the amounts of base contract work and approved change order work included. We will review and sign all payment applications before submitting them for owner approval and payment.

Construction Sequencing

The effective sequencing and scheduling of construction work around existing facilities will begin in the design phase. Known conditions that may influence the contractor's schedule will be shared with the prospective bidders at the pre-bid walkthroughs and will be further clarified at the pre-construction meeting held with the successful low bidder.

Cumming will closely review the contractor's schedule submittal to make certain that all required sequencing and milestones are shown. By closely monitoring the contractor's progress and work plan, we will be able to make recommendations as needed to adjust sequencing, work, or traffic patterns to minimize disruption to project activities.

Cost and Schedule Control

We will regularly evaluate the progress of each construction contract to forecast potential budget and schedule variances. The Cumming cost and schedule reporting will identify problems and proposed solutions: including schedule and cost status and show time and cost to complete the contract. The monthly progress evaluation will compare actual expenditures against budget and as-planned performance against actual performance. The reports will also summarize the preceding month's developments, plans for the current month, future plans, requests, recommendations, and general comments.

Testing and Inspections

During construction, Cumming will systematically verify that reviews, certifications, inspections and tests are being performed. A good quality assurance plan includes documenting all inspections, identifying items that have been satisfactorily inspected and targeting those requiring corrective action. At the beginning of construction, each inspector will review the contract documents outlining the most important elements to include in the quality control data. From the database, we can develop quality control checklists to manage startup, acceptance, and closeout procedures with the all required inspectors. At weekly meetings, the contractor's completed activities will be discussed and their quality control effectiveness measures evaluated. Where improvements are needed, the contractors are advised to implement them in time for upcoming activities.

Comprehensive and accurate as-built drawings are essential to the successful closeout of construction projects. Cumming believes that regularly updated as-built drawings are achievable when they are required for each payment application. Our team will verify that each contractor keeps its as-built drawings up to date before approving their portion of the work for payment. Any modifications to the contract documents must be posted on eDocs before submittal of any payment requests.

Furniture, Fixtures, and Equipment

Our team can assist in furniture, fixtures and equipment (FF&E) procurement. If the owner chooses, we have the ability and resources to coordinate development of detailed needs, cost, purchases, installation, and move in of all furniture, fixtures and equipment. Using FF&E planning at the beginning of a project assures that the architect

has provided space and power for unique equipment, requirements often found in educational classrooms.

Commissioning

Cumming will assure that your maintenance staff receives both appropriate orientation and instruction on new equipment and fixtures and all necessary maintenance manuals. Commissioning proves that the building and its systems work as intended. To accomplish this, our team will conduct a series of field meetings with District maintenance representatives and equipment/fixture manufacturers' representatives to conduct field training and orientation.

Change Order Management

Cumming will develop a proactive approach to change management that starts during the project design phase. We will monitor design changes and scope revisions through construction documents and perform high-level constructability reviews to assist the architect/engineer (A/E) produce clearly written and complete bid documents.

During construction, we will track A/E timeliness in responding to contractor RFIs and control the scope of A/E responses to prevent them from becoming changes or delay claims. When changes do occur, we will utilize a prescriptive approach for handling, processing, and tracking RFIs to avoid delay disruption and compounding impacts.

We will provide the entire team with guidelines on collecting and reviewing change order supporting documents such as quantity and cost calculations, inspection and test reports, drawings, and photographs to support your negotiating position. It is imperative that we evaluate the change to determine responsibility and cause such as unforeseen conditions, client-requested scope changes, or design errors and omissions.

Cumming will impose a 45-day maximum turnaround goal for the review and preparation of change orders for the client's approval. Project managers will log, track, and monitor all change documents, specifically requests for information (RFIs), requests for clarification (RFCs), contractor change order proposals (COPs), estimates of the work (independent from contractor proposed costs), records of negotiation, change justification reports, and executable change order documents.

Post-Construction

Our team can assist the architect, engineers, consultants, and all end users in developing project punch lists and verifying completion of all items. In cases where an existing facility is being remodeled, documentation of existing conditions must be performed prior to construction to confirm fairness to all parties and facilitate completion of the punch list work. If the project requires occupancy prior to completion of minor punch list items, we will coordinate with the contractor to complete the punch list work during times where activities will not be disrupted. The inspector will coordinate with the architect to confirm that completed punch list work is acceptable. After building occupancy, we can meet with the department heads and other staff as designated by your team to discuss problems experienced with new building systems.

3.3.1.1. Describe the type of staffing is required to manage the project effectively. Provide hourly rates for each classification.

Staffing

Our team will be assigned appropriately to meet your project demands. With regard to construction and project management, we currently have the capacity and can assign the level of resources that the District requires. Because we are organized to provide all our services through our expert in-house resources, we are prepared to accommodate the changing needs of our clients and any of our resources can be called upon to support the District when needed.

Our team members are fully versed in construction management services from preconstruction and planning to project close-out and occupancy. These proposed team members have supported multi-million public works projects and have provided comprehensive project/construction management services such as cost estimating, scheduling, and constructability reviews.

Proposed Hourly Rates by Classification

Cumming has provided hourly rates below to provide Construction Management Services. We acknowledge that staffing will be determined based on the District's needs. Cumming's fees are typically determined by our recommended staffing plan, projected level of effort, and proposed hourly rates, which are subject to approval by the District.

Position	Hourly Rate
Project Executive	NO CHARGE
Sr. Construction Manager	\$165
Construction Manager	\$155
Project Engineer	\$135

As-Needed Services

We acknowledge that staffing will be determined based on the District's current needs and that any associated fees from the performance of extra services will be charged on an hourly, as-needed basis. Additional as-needed support staff and services are readily available as a preventative measure to mitigate any unforeseen exposures that may impact project budget, schedule, and/or quality, if and as required by the District. As such, Cumming has provided hourly rates in the table below for additional as-needed support staff and services that are readily available to support the District, as necessary:

Position	Hourly Rate
Project Controls Manager	\$140
Constructability Reviewer	\$155
Value Engineer	\$155
Cost Estimator	\$165
Scheduler	\$155
Facilities Planner	\$145
SWPPP Practitioner	\$140
Project Coordinator	\$100

Reimbursable Expenses

Cumming's proposed hourly rates are inclusive of cell phones and phone charges, mileage within a twenty-five (25) mile radius of the project area, and company provided laptop computers, as well as all direct labor costs, fringe benefits, insurance, overhead, profit, and all other expenses required to perform the Basic Services. Reimbursable expenses are to be billed at 0% markup and are inclusive of any other expenses outside of the scope of work that are requested and authorized in writing by the District.



3.3.1.2. Describe the approach is taken to stay on schedule and meet project timeline goals.

Firm's Approach

Perhaps the best way to describe Cumming's approach to project/construction management consulting is "tested and proven." Throughout our 25 years in business, Cumming has refined the skills necessary to successfully deliver major construction programs while working in staff augmentation roles. Our approach is continuously modified to adapt to new planning, design, and construction methods, ever-changing state funding guidelines, and most importantly, to reflect the lessons we have learned over the years. We start off any program we manage with the development of a clear plan to establish the infrastructure (procedures, forms, systems) necessary to jump start the project and maintain controls for budget, time, quality, and client satisfaction. Cumming balances the need for controls with efficient, streamlined processes and tools.

To Cumming, program, project, and construction management means more than just administering a project—it means planning with a team concept, and actively motivating and managing teams to generate results for our clients. Cumming nurtures our team members with engaged leadership within the firm to help develop sound management strategies at the outset. We explore and submit viable alternatives for project delivery, assist you in understanding your options, and propose the most efficient methods for implementing your plan. As the program and projects progress, Cumming will make sure all program costs and each project is developed within budget.

We have found that an approach consisting of maximum transparency and clear, honest communication is the best way to solve any issues that arise on a project. Coordination between team members and stakeholders is crucial to the success of any staff augmentation effort, and is simply impossible without transparency, communication, and teamwork. Cumming's management approach to every project includes a focus on communication among all team members and stakeholders, concise reporting, regular and sensitive community relations, and a responsiveness to supporting our client's needs.



- **Communication** – Cumming is committed to creating a team approach to every project through focused coordination, mutual respect of all team members and stakeholders, and particularly through concise and constant communication. This involves weekly meetings, well-documented meeting minutes, and regular personal calls and emails to keep the project on track at all times.
- **Reporting** – We recognize that all parties, especially our District clients, need accurate and regular reports in a format that works with their oversight of the project, required metrics, and accountability for public funds. Cumming will develop reports to the District's high standards and deliver them accurately and on time.
- **Community Relations** – We understand the interest, enthusiasm, and concern of the community surrounding school sites, and will support the District's community relations efforts to address all stakeholders throughout the life of the project. This typically includes faculty/staff, any selected project advisors, parents of students, as well as neighbors and the community at large.
- **District Support** – Our team will provide support to the District's needs associated with the project and will do so in a positive and responsive manner – going the extra mile to further the success of the project.

CM/PM Plan Development

Our project/construction management plan is developed immediately after we receive a notice to proceed. We work the plan to ensure projects develop smoothly through all phases of construction, with a primary focus on meeting all budget and schedule parameters.

Cumming will develop and organize the District's construction management plan (CMP) into phases, each phase representing a necessary step in the logical sequence leading to a successful program. The plan will focus on further definition of the project scope of services, roles, and responsibilities for all project participants and will be completed through integration into your current staff, the selected design professionals, contractors, and consultants for the program. Furthermore, the CMP will offer a defined approach to take each project from its current state through completion of all construction, closeout, and initial occupancy activities.

We get involved starting in the preconstruction phase, helping the District with overall planning; establishment of project goals related to scope, budget, schedule, phasing, design concepts, and quality; preparation and review of conceptual cost budget and preliminary schedule; evaluation of proposed systems, equipment, and materials; analysis of delivery method options; RFP development and contractor/subcontractor procurement; and much more. Our services continue through the entire life of the project, culminating in the post-construction phase, where we assist the team in developing punch lists, verifying completion of all items, coordinating with inspectors, and training staff on building systems and equipment, to name a few.

Schedule Management

Cumming develops the control systems to manage design and construction and successfully meet completion deadlines. Our team believes in developing both a summary and a detailed schedule approach for time management control. Summary schedules, by design, inform and update senior management, while detailed construction schedules provide the day-to-day operational tools for time management.

The project master schedule is the controlling document and the basic tool for measuring performance against plan. It integrates all essential events—current and projected—and identifies tasks, responsibilities, milestones, and phases of major actions for each participant. We require cost and manpower loading of schedules to ensure we have the tools to accurately manage the job's progress. We will develop a Master Project Schedule, review the contractor's schedules, and perform weekly schedule audits and CPM monthly update reviews to enable us to maintain control.

Our key to schedule control during construction is a computerized Critical Path Method (CPM) construction schedule that combines all work activities with resources needed to complete the work. The master CPM schedule identifies and monitors major project milestones for every team member and is the detailed construction schedule that all parties use for the project's duration.

Should any of the milestone dates begin to slip, Cumming assists decision-making authorities and seeks solutions for making up time and protecting the schedule. However, should outside influences not be able to adjust, Cumming, along with the project team, can adjust the master project schedule by consuming float time, considering an extension of time for the project, or initiating a recovery schedule in order to recover lost time. All avenues for correction are investigated prior to expending additional project time and money, and the information is presented to the client's leadership team for final direction and decision.

Scheduling Example

Oakland Unified School District, Measure J Bond Program – Oakland, CA

Cumming has been working as Oakland Unified School District's (OUSD) Program and Construction Manager on more than 10 projects ranging from \$2 million to \$45 million. The District has given us their most difficult projects to manage and resolve preexisting issues on, and initial smaller projects have been completed during our year on the project. We are working closely with the District, their legal team, and the Board to bring projects back in line with budget and costs.

Cumming was brought into one new school project that was \$8 million over budget and a year behind schedule. We worked collaboratively with the designers and contractors to reduce the schedule by eight months while reducing the GMP by \$4 million without reducing the project's programming, size, or quality of the teaching experience. We are working to achieve similar results on three other

projects currently under negotiation, finding millions of dollars in savings while keeping the needs of the school intact. In one example, we reviewed and revised the specification for installing new elevators, saving the District more than \$1 million.

The four large Lease-Leaseback projects we engaged with all had significant scheduling issues. On a second new high school, we reduced the schedule by more than six months and are currently value engineering millions of dollars out of the GMP. On an existing major campus project, we found that the contract was written poorly and did not coincide with new codes. We mitigated these project risks by becoming studying the projects and working collaboratively with the designers, Inspectors of Record, and the District to review planned work and work in place. During pre-construction, we performed constructability reviews and provided estimates at appropriate times to validate budget compliance.

The OUSD program will continue through 2020 and has more than \$500 million in funding. We currently have five staff members supporting the District on all levels of the program. In addition to the work described above, we also perform community outreach, local business enterprise compliance, presentations to the board and the community, as well as providing support to the District's legal team, as required.

“Based on the performance of the Cumming team, I would recommend Cumming to any school district or agency without reservation.”

— Alan Reising, Executive
Director, Facilities Development & Planning
Long Beach Unified School District

3.3.2. Computer Project Management/Scheduling and Electronic Design. Briefly describe firm's experience with scheduling and ensuring the scope of work is completed on time, as well as the any additional software that will be utilized.

Construction Management Software Proficiency

Cumming utilizes a variety of Data Management Systems (DMS), Management Information Systems (MIS), and Building Information Modeling (BIM) tools that are designed to meet a particular client's specific needs and expectations. These management systems and tools are capable of tracking multiple projects and programs with regard to schedule, cost, quality, and general information for multiple users—either connected within a hardwired network or through a web-based internet application utilizing cloud technology. We have built some of these systems in-house and have opted to use industry standard systems as well.

A significant feature of Cumming's systems is the capability and practice of converting the record documents of the project or program into a systematic and electronic format, including Excel. Additionally, these systems facilitate the development and tracking of multiple project budgets assigned to specific funding categories, or the tracking and management of budgets that are being funded from multiple sources. These capabilities provide easy assessment of effects on funding plans and will support continuous financial planning at either the project or the program level.

The systems will also allow the organization of projects or tasks within a program, utilizing a portfolio system, that will group items as requested, such as by End User or by Funding Source. This organizational structure allows project tracking and reporting by the group selected, yielding budget and cost data comparisons to selected viewers, both "in house" and through the internet, as appropriate.

Cumming team members, including those proposed on your projects, have significant experience with multiple DMS/MIS systems applications for scheduling, contract management, and records management. The implementation of these applications, combined with our experience, technical expertise, and effective processes, has allowed us to provide efficient, real-time information to our clients, resulting in logic-based decisions, claims avoidance, and successful, high quality projects delivered on time and on budget.

Document Management

The Document Management Systems / Management Information Systems (DMS/MIS) used by Cumming comprise both industry leading project management and business application software (including Primavera, Expedition, Prolog, and Autodesk) in conjunction with proprietary programs such as cmWare, our estimating templates, our intranet, a design management portal, and Sharepoint integration. Our flexibility in the use of these information systems allows complete agility to interface with and meet our clients' requirements.

Cumming primarily uses Primavera Project Planner as a multi-project planning and scheduling tool to create, track, and report the majority of project and program level information. Our deep knowledge of scheduling with both P3 and P6 has led clients to retain us for litigation support and as an expert witness. Some of the reporting we have done includes the following:

- Master and Forward Scheduling (including Entitlements & Transition Planning)
- Monthly Schedule, Cost, and Resource Management
- As-Planned Schedule Validation and Adjustments
- Design Directives, Procurement, Logistics, and Means & Methods Assessments
- Labor Productivity and Utilization Studies
- Comparative Critical Path Delay and Acceleration Analyses
- Earned Value Analysis
- Program Cost Trends Budget vs. Actuals
- Value Stream Mapping
- Program Level Dashboard Reporting

Expedition or cmWare are generally employed as our contract management tool, to establish detailed information for tracking progress, and to conduct administrative contract management functions on design and construction projects. Expedition facilitates the development and tracking of multiple project budgets assigned to specific funding categories, as well as the tracking and management of budgets that are being funded from multiple sources. These capabilities provide easy assessment of effects on funding plans and will support continuous financial planning at the program level.

Our in-house system, cmWare, provides easy to read, easy to operate information tracking for budgets, RFI logs, daily reports, expenditures, and commitments. cmWare provides a secure program management and accounting program that establishes different levels of authority for viewing and editing information.



Scheduling Software

Cumming primarily uses Primavera Project Planner as a multi-project planning and scheduling tool to create, track, and report the majority of project and program level information. Our deep knowledge of scheduling with both P3 and P6 has led clients to use us for litigation support and as expert witnesses.

The master Critical Path Method (CPM) network identifies and monitors major project milestones for every team member and is the detailed schedule that all parties use throughout the project's duration.

Types of analyses and reports include:

- Master and Forward Scheduling (Including Entitlements & Transition Planning)
- Cost and Resource Loading – Monthly Schedule, Cost and Resource Management
- As-Planned Schedule Validation and Adjustments
- Design Directives, Procurement, Logistics and Means & Methods Assessments
- Labor Productivity and Utilization Studies
- Comparative Critical Path Delay and Acceleration Analyses
- Earned Value Analysis



Project Controls Reporting – CAPP Analytics

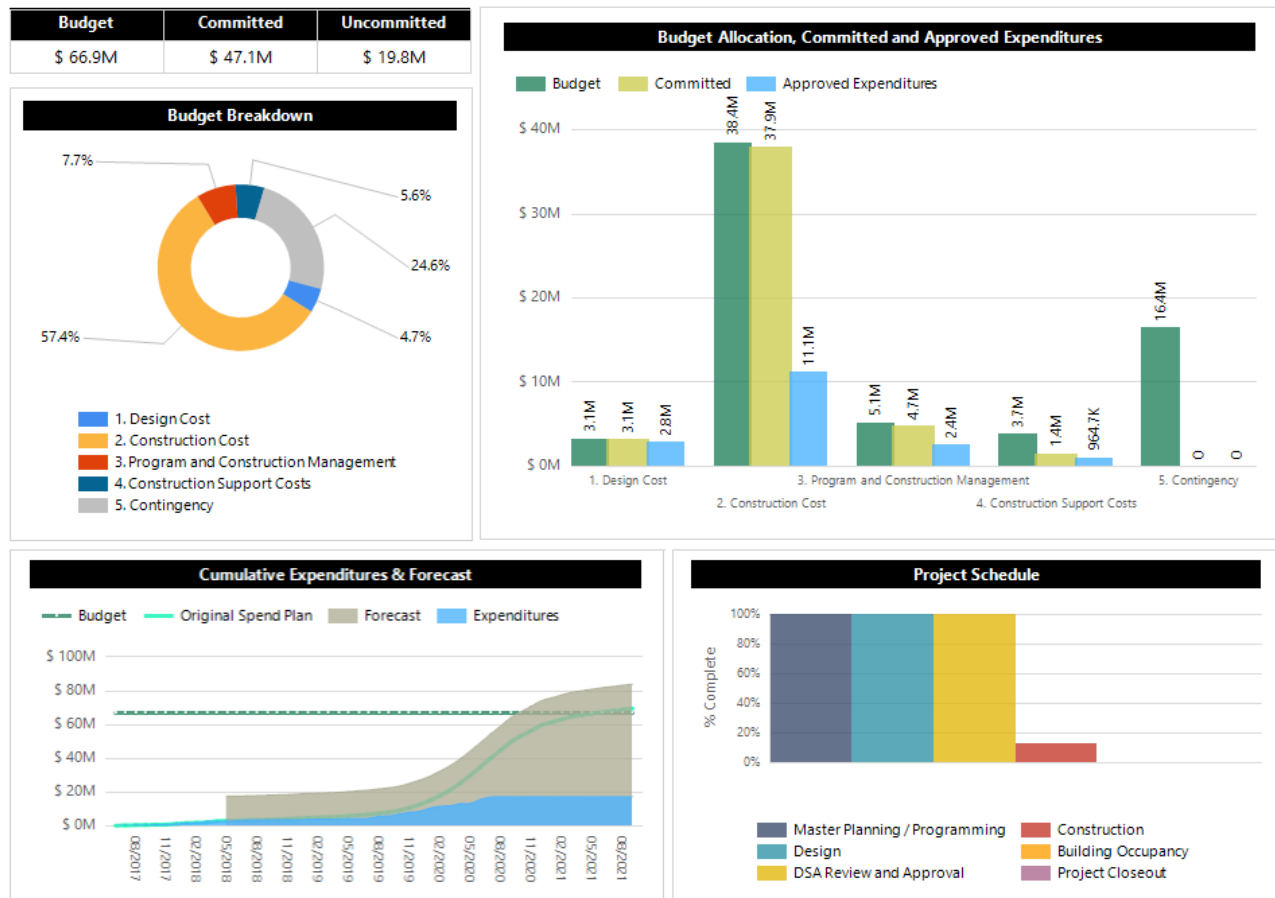
CAPP Analytics is a proprietary cloud-based application designed to help its users manage their projects efficiently and effectively, centralizing information in a single location and creating an automatic audit trail as part of their daily activities. Integrating it into everyday practices saves users time and increases confidence in the data, as the system helps validate the users' inputs while enabling reporting on it instantly and automatically.



Capable of managing and reporting single projects or entire programs, it supports any number of users whose access rights can be customized per account feature and by project, enabling individuals and teams to work securely and collaboratively. Adopting the system as part of the management process brings in consistency for all involved, including owners, managers and other team members. 24/7 access increases productivity, transparency, compliance, and confidence.

Organizations that value data-driven management and decision-making can greatly benefit from using CAPP as a central data and document repository for financial, construction, procurement, risk and other information. Specifically designed to support and track with a Program Controls and reporting mindset, its flexible and customizable engine can streamline accessibility, reporting of metrics and delivery to different audiences, naturally optimizing the work of different users with varying roles, and how they interact the system. Using it as a central engine it inherently integrates disparate teams like management, staff, designers, CMS, consultants, and leadership when implemented as part of the Management Process System of procedures and practices for a Bond Program; both during its life-time and long after, as an always on historical archive.

Overview



Section 4

Subconsultants

3.4.1. Provide a schedule of sub-consultants or sub consultant categories, if any that are likely to be used in carrying out any work that may hereafter be awarded to the firm by the District. List category, names, business address, and phone number.

As a full-service construction management consultancy, Cumming is fully equipped to provide the services needed by the District. We do not anticipate the need to augment our team with any outside consultants.



Section 5

References

3.5.1. Provide a minimum of three (3) K-12 school district references. Include the district name, a contact person, title, and phone number for each.

Reference #1

District Name: Anaheim Union High School District
Contact Person: Patty Neely
Title: Director of Facilities and Planning
Phone Number: (714) 999-5454
Email: neely_p@auhsd.us

Reference #2

District Name: Anaheim Elementary School District
Contact Person : Isela Vasquez
Title: Senior Director of Facilities Planning
Phone Number: (714) 517-7549
Email: ivasquez@aesd.org

Reference #3

District Name: Los Angeles Unified School District
Contact Person: Steve Boehm
Title: Deputy Director, Specialized Programs
Phone Number: (213) 241-7557
Email: steve.boehm@lausd.net



Section 6

Legal Issues

3.6.1.1. Is there now pending any legal action against the firm or any employee of the firm alleging violations of the law in connection with an offering of municipal securities in a California transaction? If so, please describe such pending action.

No. Cumming is not involved in any pending legal action against the firm or any employee of the firm alleging violations of the law in connection with an offering of municipal securities in a California transaction.

3.6.1.2. Have there been any settlements or judgments involving such actions within the last five (5) years? If so, describe each such settlement or judgment, including the nature of the action and the amount of recovery.

No. Cumming has not been involved in any settlements or judgments regarding such actions within the last five years.

3.6.1.3. Please list and describe any judgment, settlement, or arbitration award valued at \$5,000 or greater relating to a civil action judgment, settlement, arbitration award, or administrative action for any individual licensee, as required to be reported to the State of California.

None.



Section 7

Other Forms

We have included the required executed forms beginning on the following page:

- Attachment B "Certification- Request for Qualifications."
- Attachment C "Statement of Experience and Financial Condition."
- Attachment D "Questions."
- Attachment E "Project Reference."
- Attachment F "Conflict of Interest."
- Attachment G "Firm Proposal/Offer."
- Attachment H "Non-Collusion Declaration."

Also included are the Q&A document issued by the District and the RFQ Evaluation Form, both signed as required.



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.



Signature

Executive Vice President

Title

130 Vantis Drive, Suite 110

Address

323-855-4710

Telephone

February 22, 2021

Date

Anthony Sanchez

Typed or Printed Name

Cumming Management Group, Inc.

Company

Aliso Viejo, CA 92656

Address

949-900-0450

Fax

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



ATTACHMENT C

STATEMENT OF EXPERIENCE AND FINANCIAL CONDITION

Company Name: Cumming Management Group, Inc.

(Check One): X Corporation Partnership Sole Proprietorship

Address: 130 Vantis Drive, Suite 110
Aliso Viejo, CA 92656

Telephone/FAX#: 323-855-4710 / 949-900-0450

Date and State of Formation/Incorporation: Incorporated April 6, 2007 in California

Is the company authorized to do business in California? Yes

Basis of Authorization: X California Corporation X 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: _____

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>\$66,300,000</u>	<u>\$75,00,000</u>	<u>\$82,300,000</u>
Total:	<u>\$131,500,000</u>	<u>\$151,800,000</u>	<u>\$200,600,000</u>

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

LaGuardia Airport Redevelopment - \$8 billion

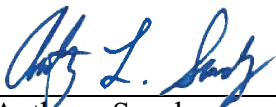
ATTACHMENT D

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:

Anthony Sanchez

TITLE:

Executive Vice President

Cumming Management Group, Inc. is a wholly owned subsidiary of Cumming Group, Inc.

Cumming Management Group, Inc. also has other subsidiaries under it, including Lehrer Cumming, Prosurv, TowerEight, CapEx Cumming, Project One Cumming, mhbc Cumming, and PlanB Consultancy.

Anthony Sanchez
Executive Vice President

A handwritten signature in blue ink, appearing to read "Anthony L. Sanchez", written in a cursive style.

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.

Please see chart provided on the following 6 pages. Following those pages, we have detailed Katella High School DROPS Program as the example where we provide a cost breakdown. Cumming only provided Project Management Services and the the cost for the services is \$608,742.

PROJECT TITLE AND LOCATION	NAME, ADDRESS, AND PHONE NUMBER OF CONTACT PERSON	NATURE OF FIRM'S RESPONSIBILITY	TYPE OF CONTRACT (PERFORMANCE, DIRECT COST, ETC)	CONTRACT AMOUNTS	START DATE	CURRENT STATUS
<u>Project Name</u> Sunkist Elementary School Reconstruction and Modernization <u>Location</u> Anaheim Elementary School District – Anaheim, CA	<u>Contact Person</u> Isela Vasquez <u>Phone Number</u> 714-517-7549 <u>Address</u> 1001 S East St, Anaheim, CA 92805	Construction/Project Management and Cost Estimating	Not-to-Exceed	\$602,880	May 2018	Ongoing
<u>Project Name</u> Roosevelt Elementary School Reconstruction Project <u>Location</u> Anaheim Elementary School District – Anaheim, CA	<u>Contact Person</u> Isela Vasquez <u>Phone Number</u> 714-517-7549 <u>Address</u> 1001 S East St, Anaheim, CA 92805	Construction/Project Management and Cost Estimating	Not-to-Exceed	\$600,640	December 2018	Ongoing
<u>Project Name</u> John Adams Middle School Performing Arts Center (JAMS PAC) <u>School District</u> Santa Monica Malibu Unified School District – Santa Monica, CA	<u>Contact Person</u> Steve Massetti <u>Phone Number</u> 310-450-8338 X79389 <u>Address</u> 1651 16th St, Santa Monica, CA 90404	Construction/Project Management	Not-to-Exceed	\$1,368,960	May 2019	Ongoing
<u>Project Name</u> New Compton High School <u>School District</u> Compton Unified School District – Compton, CA	<u>Contact Person</u> Nate Holt <u>Phone Number</u> 310-639-4321	Construction/Project Management	Not-to-Exceed	October 2018	\$680,000	Ongoing

	<u>Address</u> 501 South Santa Fe Ave, Compton, CA 90221					
<u>Project Name</u> Measure B Bond Program and 21 st Century Classrooms (Phase I and II) <u>School District</u> Hacienda La Puente Unified School District – La Puente, CA	<u>Contact Person</u> Joel Duarte <u>Phone Number</u> 626-933-3932 <u>Address</u> 15959 East Gale Ave. City Of Industry, CA 91745	Program Management, Construction/Project Management	Not-to-Exceed	July 2019	\$450,000	Ongoing
<u>Project Name</u> Measure K Bond Program (\$1.2B) and Measure E Bond Program (\$1.5B) <u>School District</u> Long Beach Unified School District – Long Beach, CA	<u>Contact Person</u> Alan Reising <u>Phone Number</u> 562-997-7550 <u>Address</u> 1515 Hughes Way, Long Beach, CA 90810	Management of Bid Contract, Planning, Design Management, Construction Management, Cost Management, Schedule Management, DSA Coordination, Stakeholder Coordination, Move Management, Document Control, Project/Program Controls, IT	Not-to-Exceed	August 2016	\$4,012,462	Ongoing
<u>Project Name</u> District Summer Projects 2018 <u>School District</u> Newport-Mesa Unified School District – Newport Beach, CA	<u>Contact Person</u> Ara Zareczny <u>Phone Number</u> 714-424-8934 <u>Address</u>	Construction/Project Management	Not-to-Exceed	June 2018	\$308,045	December 2018

	2985 Bear St, Costa Mesa, CA 92626					
<u>Project Name</u> Districtwide Summer Projects 2018 <u>School District</u> Anaheim Elementary School District – Anaheim, CA	<u>Contact Person</u> Isela Vasquez <u>Phone Number</u> 714-517-7549 <u>Address</u> 1001 S East St, Anaheim, CA 92805	Construction/Project Management	Not-to-Exceed	June 2018	\$149,800	September 2018
<u>Project Name</u> Measure H Bond Program (\$249M) <u>School District</u> Anaheim Union High School District – Anaheim, CA	<u>Contact Person</u> Patty Neely <u>Phone Number</u> 714-999-5454 <u>Address</u> 501 Crescent Way, Anaheim, CA 92803	Program Management, Project Management, Program Controls, Scheduling, Energy Services	Not-to-Exceed	November 2015	\$3,805,227	Ongoing
<u>Project Name</u> Measure S Bond Program (\$288M) <u>School District</u> Orange Unified School District – Orange, CA	<u>Contact Person</u> Scott Harvey <u>Phone Number</u> 714-628-4585 <u>Address</u> 1401 N Handy St, Orange, CA 92867	Program Management, Management of Bid Contract, Planning, Design Management, Construction Management, Cost Management, Schedule Management, DSA Coordination, Move Management, Document Control, Project/Program Controls	Not-to-Exceed	February 2016	\$2,976,655	Ongoing

<u>Project Name</u> Measure S Bond Program <u>School District</u> Glendale Unified School District – Glendale, CA	<u>Contact Person</u> Tony Barrios <u>Phone Number</u> 626-821-1435 <u>Address</u> 223 North Jackson St, Glendale, CA 91206	Construction/Project Management, Project Controls	Not-to-Exceed	November 2015	\$1,839,834	December 2017
<u>Project Name</u> John Adams Middle School Performing Arts Center (JAMS PAC) <u>School District</u> Santa Monica Malibu Unified School District – Santa Monica, CA	<u>Contact Person</u> Steve Massetti <u>Phone Number</u> 310-450-8338 X79389 <u>Address</u> 1651 16th St, Santa Monica, CA 90404	Construction/Project Management	Not-to-Exceed	April 2018	\$191,400	April 2019
<u>Project Name</u> Measure G Bond Program (\$375M) <u>School District</u> Norwalk La Mirada Unified School District – Norwalk, CA	<u>Contact Person</u> Edith Florence <u>Phone Number</u> 562-868-9014 x614410 <u>Address</u> 12820 Pioneer Blvd, Norwalk, CA 90650	Program Management, Construction/Project Management, Program Controls	Not-to-Exceed	August 2016	\$1,929,617	Ongoing
<u>Project Name</u> Measure Q Bond Program (\$7B) <u>School District</u> Los Angeles Unified School District – Los Angeles, CA	<u>Contact Person</u> Steve Boehm <u>Phone Number</u> 213-241-7557 <u>Address</u>	Project/Construction Management, Cost Estimating, Project Controls, DSA Coordination, Asset Management, Design	Not-to-Exceed	January 2015	\$10,173,130	Ongoing

	333 South Beaudry Ave, Los Angeles, CA 90017	Management, Move Management				
<u>Project Name</u> New Residence Hall <u>School District</u> Scripps College – Claremont, CA	<u>Contact Person</u> Dean Calvo <u>Phone Number</u> 909-621-8211 <u>Address</u> 1030 N Columbia Ave, Claremont, CA 91711	Construction / Project Management	Not-to-Exceed	November 2015	\$445,368	December 2016
<u>Project Name</u> Measure J Bond Program (\$3.5B) and Measure CC Bond Program (\$3.3B) <u>School District</u> Los Angeles Community College District – Los Angeles, CA	<u>Contact Person</u> Ruben Smith <u>Phone Number</u> 213-891-2000 <u>Address</u> 770 Wilshire Blvd, Los Angeles, CA 90017	Design-Build Procurement, Design Management, Construction/Project Management, Cost Management, Schedule Management, DSA Coordination, Quality Management	Not-to-Exceed	January 2016	\$14,302,263	Ongoing
<u>Project Name</u> Measure GC Bond Program (\$325M) <u>School District</u> Glendale Community College District – Glendale, CA	<u>Contact Person</u> Susan Courtney <u>Phone Number</u> 818-240-1000 x5124 <u>Address</u> 1500 N Verdugo Rd, Glendale, CA 91208	Construction / Project Management	Not-to-Exceed	January 2016	\$1,794,887	February 2021
<u>Project Name</u>	<u>Contact Person</u> Carri Matsumoto	Project/Construction Management, Cost	Not-to-Exceed	January 2016	\$7,777,000	Ongoing

Measure Q Bond Program (\$198M) <u>School District</u> Rancho Santiago Community College District – Santa Ana, CA	<u>Phone Number</u> 714-480-7510 <u>Address</u> 2323 N Broadway, Santa Ana, CA 92706	Estimating, Project Controls, DSA Coordination				
--	---	--	--	--	--	--

<u>Agency or District Name & Location (Address)</u>	<u>Brief Description of Work (Be Specific) Project Name(s) Include Name of CM/PM</u>	<u>Client Name, Title, Phone #, Email Address</u>	<u>*Type(s) of Construction (See Below)</u>	<u>Firm Role (Prime or Sub)</u>	<u>Dates Project Start/ Project Completion</u>	<u>Prime was Contracted to Provide Staff Augmentation Services</u>	<u>Approx Total Amount Invoiced</u>
<u>District</u> Anaheim Union High School District <u>Address</u> 501 N. Crescent Way, Anaheim, CA 92801	<u>Project Name</u> Katella HS DROPS Site Improvement Project <u>Name of CM/PM</u> Leslie Sydnor Antonio Salcido Brianna Quintanar <u>Description of Work</u> Cumming was responsible for the overall program and construction management as an owner's representative. Cumming was responsible for project planning during pre- design, supervision during design, and oversight throughout construction.	<u>Client Name</u> Patricia Neely <u>Title</u> Director, Facilities, Planning, Design, and Construction <u>Phone</u> (714) 999-3505 <u>Email Address</u> neely_p@auhsd.us	F, R, A	Prime	<u>Construction Start Date</u> 3/28/2016 <u>Construction Completion Date</u> 5/5/2017	Yes	\$608,742

Narrative – Description of Project and Services Provided - include Subcontractor firm names used and services provided. Provide the total number of full-time staff provided by your firm for the period noted and positions, indicate subs with an asterisk. Provide data analysis of total # of full-time staff, amount invoiced for Contract Professionals and duration. Describe specific information about services provided (example: how many construction sites were managed, sizes of sites, complexity of buildings, historical, DSA Application Number(s), construction value, etc.).

Description of Project: The Katella High School DROPS (Drought Response Outreach Program for Schools) Site Improvement Project was the first project of the Measure H bond. The project consists of the installation of a campus-wide underground storm drain system that supports a bio-infiltration system to treat and infiltrate runoff water; replacement of severely damaged asphalt, concrete, and compacted turf with approximately 250,000 square feet of permeable surfaces; new canopies,

colonnades, and other shade structures (pre-approved by DSA); and the installation of two greenhouses and extensive drought tolerant landscaping, as required by the DROPS grant program. The campus remained active throughout construction. A precise phasing and logistics plan, developed by the program management team, provided the contractor with the direction needed to complete the project on schedule. Through our stringent program management, we were able to implement two management information systems, successfully manage the DROPS grant, and monitor the general contractor to deliver the project not only on time, but under budget.

Services Provided: Program and Construction Management Services

Subcontractor Firms Used: None

Total Number of Full-Time Staff Provided by Cumming and Positions: Three (3) Full-Time Staff

1. Name and Position: Leslie Sydnor – Program Manager
2. Name and Position: Antonio Salcido – Senior Project Manager
3. Name and Position: Brianna Quintanar – Assistant Project Manager

Amount Invoiced for Contract Professionals: \$608,742

Duration: March 28, 2016 through May 5, 2017

DSA Application Number(s):

1. DSA Application Number: 04-115416; 04-110713
2. DSA Project Approval Date: 6/30/2016; 11/16/2011
3. DSA Closed with Certification Date: 9/28/2017; 10/9/2017

Project Delivery Method: Lease-Leaseback

Construction Value: The project came in under budget with a construction deductive change order of \$(450,626.63).

Initial Construction Contract Amount (GMP): \$11,368,000.00

Final Construction Contract Amount inclusive of all Change Orders: \$10,917,373.37.

Change Order Percentage: (-4%)

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



Printed Name

Anthony Sanchez

Title

Executive Vice President

Date

February 22, 2021

ATTACHMENT G

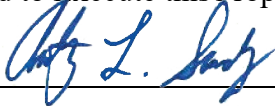
FIRM PROPOSAL / OFFER FORM

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: Anthony Sanchez

Duly Authorized Signature: 

Title: Executive Vice President

Date of this Proposal/Offer: February 22, 2021

Offeror Name: Cumming Management Group, Inc.

Offeror Address: 130 Vantis Drive, Suite 110

Aliso Viejo, CA 92656

Offeror Telephone: 323-855-4710

Offeror Email: ssanchez@ccorpusa.com

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 Cumming Management Group, Inc. **[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: February 22, 2021

Proper Name of Submitter: Cumming Management Group, Inc.

City, State: Aliso Viejo, CA

Signature: 

Print Name: Anthony Sanchez

Title: Executive Vice President

RFQ 119-21 Construction Management Services Q & A

1. The Attachment G form includes the wrong RFQ# and the following language “SAUSD”. Can the District please provide clarification on whether we should sign the Attachment as is? Or If we should update the language to reflect RFQ# 119-21 and NMUSD? [This is a typo you can sign and submit as is.](#)
2. Section 10C, Compensation and Payment – are payments on a monthly basis or only at final completion of the project? [Can vary by project, if it is a long term project payment requests can be submitted during completed milestone points for smaller short term projects contracts are normally paid in full upon completion.](#)
3. Section 3.1.2 and 3.1.3 both denote to provide resumes of the proposed staff. Which section do you want to see the resumes of our proposed staff? [Can be provided in either section, information does not need to be duplicated between sections.](#)
4. Section 3.3.1.1 asks firms to describe the type of staffing required to manage the project effectively. Would you like firms to use their own specific project as an example when discussing staffing requirements for this on-call RFP? [Yes, provide examples of projects completed and the type of staff that were assigned to the project.](#)
5. If the District were to request a Construction / Project Manager to support preconstruction services on a project, would that same Construction / Project Manager oversee the construction and closeout phases. [Typically, yes the construction manager that is brought on board for pre-construction will be the construction manager for the entire project from design thru construction/Closeout.](#)
6. Please provide the types of projects NMUSD will need assistance with. [Projects vary widely based on available funding, a representative example of some of the work undertake during the last couple years can be found here;
<https://web.nmusd.us/constructionprojects>](#)
7. How does NMUSD select candidates for staff augmentation needs? Do consulting firms provide qualified staff directly, or is there a formal recruitment process? [Can you please clarify what you are asking by Staff Augmentation needs?](#)
8. To clarify on the staff augmentation question, would consultants be working along-side other consultants and district employees? [Yes, you can anticipate working alongside various consultants for inspections, geotechnical etc.](#)
9. How many firms will NMUSD be selecting under this contract? [Selection will be based on number of RFQ submissions we are anticipating at least 5 firms.](#)
10. If NMUSD selects a CM to support a project, will that selected CM move on to other projects in the District once their first project completes closeout? [Yes, projects will](#)



continue to be offered to all CMs throughout the term of the contract which will be a maximum of (5) five years.

11. Will opportunities under this contract be full time or part time? *The majority of our projects will require a full time staff commitment although some smaller projects may only require part-time it will vary based on the size and complexity of the individual projects.*
12. Page 19 of the RFQ, section Other Forms, states: 3.7.8. *Offerors shall execute and submit with any proposal and Hourly Fee Schedule.*
Also, page 18, section Project and Cost Management, of the RFP states: “3.3.1.1. ... *Provide hourly rates for each classification.*” Can you please clarify if we are to provide hourly rates for our proposed staff? Are we to also provide a fee schedule? If we are to provide a fee schedule, are we to provide a range of fees based on various project sizes and durations? *Please provide hourly rates for various staff that may work on a project, fee schedule should include any ancillary fees outside of the normally hourly rate for staff. Feel free to include a fee range if your fees vary based on the size of project.*
13. Can you provide the contract documents that the District uses for CM Services? *We are currently drafting a new CM agreement it will be provided at a later date for review.*
14. What is the delivery method? CM-Multiple Prime or CM-Agency? *Typical projects would be CM Multi-prime but that does not mean the potential use of CM Agency does not exist.*
15. What projects are to be considered/included in the CM pool? *The majority of projects will be site modernization work or full building construction projects.*
16. Does the District give preference to certified DBE/WBE/SBE firms? *These do not apply for this RFQ.*
17. Most of NMUSD projects are “Sealed Bid” or Design-Bid-Build Delivery Method. It appears that this RFQ is for Construction Manager @ Risk (CMAR)? Can you clarify how the district will deliver upcoming projects and if any projects will be delivered via Lease-Leaseback, Design-Build, CM-Multi Prime, CMAR, etc.? *All delivery methods are possible but the majority of projects completed by the District in the past are CM-Multi Prime and Design-Build.*
18. Please clarify or confirm that the RFQ Evaluation Form (page 8 of RFQ package) should be included in responders RFQ response package and not sent separately to the District. I understand that the District will not review the remainder of the RFQ response if a proposer does not receive at least 80% on the RFQ Evaluation. *Yes, it should be included, the entire RFQ will be reviewed, this is one part of the RFQ review process.*



19. As a result of COVID-19, will the District accept electronic submissions in lieu of the (3) hard copies submission requirement? [I prefer hard copies as I have to distribute them to reviewers. I will be here collecting RFQs on the due date. If this is not possible I will accept an electronic copy.](#)
20. Within Attachment G, the RFQ references the following number “RFP # 114-21” – our team wanted to ensure that this was a simple oversight and will not affect the submittal in any way. [This is a typo you can sign and submit as is.](#)
21. The District’s RFQ for construction management services does not ask for fees under Item 3, Response Format other than hourly rates for our expected staffing for efficient project management (page 13, item 3.3 Project and Cost Management, 3.3.1.1. However, on page 6, item 5, the RFQ states “Each proposal/offer must be a firm irrevocable offer, and remain open and valid for sixty days (60) days after RFQ closing. Please confirm that you are expecting a fee proposal be included in our RFQ response. [Yes, please provide rates and fees in your proposal response.](#)
22. Just confirming 3.1.1, 3.1.2 and 3.1.3 is all referencing a joint venture? If we are not a joint venture, then we would not need to provide anything for 3.1.2 and 3.1.3? Just wanted to confirm as section 3.2.3 asks for resumes too. [Section 3.1.1 Asks for a profile of your company, if you are submitting as a joint venture you must submit the joint ventures federal tax id verification. Section 3.1.2 Asks for a one-page outline of the structure \(org chart\) for your organization. If you are a joint venture additional requirements apply, Section 3.1.3 Asks for staff qualifications by providing info on recent projects, Section 3.2.3 Asks for resumes to be provided of staff that may be assigned to district projects if awarded a contract.](#)



**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: Cumming Management Group, Inc.

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	Aliso Viejo, Orange County, CA	5
2. Past Performance	Write in:	Max. Pts.
a. Identify the Firm's number of years' experience in providing services for K-12	25	5
b. Project listing - Identify the number of K-12 projects the Firm has worked on within last 3 years	1,000s of K-12 projects	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	934	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)	3	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.

Anthony Sanchez

Printed Name


Signature

February 22, 2021

Date