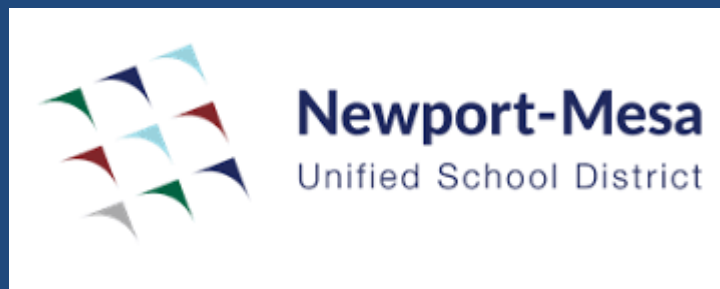


RCM

RCM Group, LLC
Construction Management Services

Los Angeles, CA



Request for Qualifications

RFQ#119-21

Construction Management Services

February 22, 2021

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Newport Mesa Unified School District

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NEWPORT UNIFIED SCHOOL DISTRICT



“Provide a quality educational program that meets the needs of all students in the district”.

Cover Letter

Newport Mesa Unified School District

RCM Group

5725 Whittier Blvd, Los Angeles, CA 90022 Phone:
323-767-5302 | Fax: 323-728-2765
Federal Tax ID# 45-2937586 | License: 201712910419

February 22, 2021

ATTN: Jonathan Geiszler, Director of Purchasing & Warehouse

Re: Request for Qualifications, (Construction Management Services)

Dear Mr. Geiszler,

RCM Group, LLC is pleased to submit this proposal in response to Newport Mesa Unified School District RFQ #119-21 for Construction Management Services. RCM Group, LLC is a small minority firm, offering client-focused access and dedication to the project, with big-firm project experience working for and within the K-12 Education sector. Projects have ranged from HVAC modernization of existing facilities, kitchen upgrade expansions of existing K-12 schools, bungalow relocation and New Construction.

Why the RCM Team? We have a talented team of in-house professionals who possesses both individual and collective experience providing engineering and construction management services to K-12 school districts (LBUSD, LAUSD, FUSD, ALUSD, GUSD) and others. Our mission is to serve and support our clients, so that they may best tailor to the needs of their students, faculty staff, residents and together build stronger communities.

A partnership with RCM for your upcoming projects will provide the Newport Mesa Unified School District with a talented team of local professionals who possess both individual and collective experience working with California school districts. This level of expertise makes us uniquely qualified to offer exceptional construction management services that will ensure the success of your program. As seasoned construction managers, we understand the complexities of the Education Code and Public Contract Code as they relate to managing California school construction projects and have managed all types of construction delivery methods, such as CM Multiple Prime, Lease-Leaseback, Design Bid Build and JOC Contracts.

With this knowledge as our foundation, we develop creative approaches and solutions that only years of continuous, hands-on experience can provide. Our insight and experienced in-house team of professionals is what differentiates RCM from our competition and generates positive results for our clients.

RCM continues to grow and mentor our team members, including certified construction managers, licensed engineers and architects, project engineers, schedulers, LEED Accredited Professionals, ADA experts, and more. While trained as construction managers, engineers and builders, our passion is not about constructing buildings. Our passion is in creating places for the future -where faculty, students and staff can excel in training and educating the workforce and the leaders of tomorrow.

In addition, RCM has extensive in-house resources, any of which are available at a moment's notice. These resources include experts in the areas of cost management, scheduling, ADA compliance, CAD/BIM Management, design management, value engineering, constructability reviews, and more.

Cover Letter

Newport Mesa Unified School District

We believe that a successful Construction Manager in today's Education arena must first and foremost be capable of serving the District's interests throughout the programming, design, construction and commissioning of the project. Our firm is established on the core philosophy of providing Owner advocacy. To be your advocate, the Construction Manager must be proficient in the following:

- Understanding the "Client": As a Construction Manager, we are invited "guests" into our client's business environment. To be effective and efficient we must have a thorough knowledge and understanding of the forces that shape your business decisions.
- Timely Information: Good decision-making requires establishing and implementing processes that provide the District's team the ability to make informed decisions. These processes must be inclusive, participatory, and timely.
- Collaboration: The design and construction of today's educational projects takes a team - a very large team. We understand this and take great pride in being a team player. To meet the goals and objectives of the District, it is essential the Construction Manager be the pro-active facilitator of the process and by doing so require and strive for excellence from the entire team of design and construction professionals.
- Consultant fees are a critical component of any project. Indeed, this knowledge informs our construction management practice, which we carry out on behalf of our clients with a dual emphasis on quality and added value. To achieve this, we utilize the most qualified staff and surround them with the tools and resources they need to be as efficient and quality-driven as possible. Ultimately, all of this translates into lower fees to our clients. This will be shown on the professional fees section 4 on the proposal for quality and added valued.

Our team will be a tremendous fit for Newport Mesa Unified School District based on our team members' very relevant experience and our ability to create a cooperative partnership throughout the entire process. We are ready to assist and provide construction management services for various facilities improvement projects for your current and future needs and believe that we bring value and team experience to help Newport Mesa Unified School District succeed to the scope of work outlined in the RFQ.

As RCM's President, I am authorized representative of the firm regarding all matters related to our proposal. I have more than 25 years of experience in the education construction sector and have the in-depth knowledge and expertise to deliver your projects successfully. I can be reached at the number and email listed in my below signature. Thank you for considering RCM Group, LLC to be Pre-Qualified for Construction Management Services to your school district.

Sincerely,



Jerry Roberts, President

Email: jroberts@rcmgroup-team.com

Cell: 213-298-1621



Business Profile

RCM Group

5725 Whittier Blvd, Los Angeles, CA 90022 Phone:
323-767-5302 | Fax: 323-728-2765

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Newport Mesa Unified School District

RCM Group, LLC., (RCM) was established in 2015 as Roberts Construction Management Group, LLC and is based out of Los Angeles, California as a full service construction management firm. Our goal is to provide more than quality construction management services. At RCM, we provide responsive services that lead to effectively completed projects. From the initial consultation to the completed project, we go above and beyond. RCM is an owners advocate and has a solid reputation for doing honest work, the firm places integrity and skill at the front of everything we do. Every project receives our full and undivided attention. This allows us to guarantee the work and provides clients with assurance that they made the right choice.

RCM has earned an outstanding reputation in the construction management industry for providing exceptional services to our education clients. Our experienced and talented staff has delivered complex K-12 construction projects on time, on budget, and claims free. The education market sector is our core business – we have provided outstanding service to our current K-12 and private university clients, with the highest concentration of those clients are in Southern California.

Jerry Roberts is the President of RCM and the Responsible Managing Officer (RMO) Mr. Roberts has oversight of all the project teams including those constructing public works jobs, public school construction, both new and modernizations, and our commercial construction projects. Mr. Roberts also has over 20 years of experience in corporate management and is responsible for the day to day business operations and overall business development and will be the lead manager for Kern County Superintendent of School projects.

Mr. Ted Dutton is Vice-President of Government Relations at RCM. Mr. Dutton, a past Executive Director of the Office of Public School Construction (OPSC), actively works with state agencies, elected officials, and community organizations that support public schools to ensure that RCM's clients identify funding resources and options to meet all facility needs.

Mr. Stephen Murray serves as Vice-President of Program and Construction Management at RCM. Mr. Murray has over 40 years of strong and diverse management experience in all aspects of modernization and new construction from site planning through final completion. Mr. Murray has successfully completed over 50 public school construction projects throughout his career including; removing entire schools and performing full site restoration, modernizations and new construction.

RCM is staffed with experienced, professional employees who will provide the highest level of commitment to support the goals and objectives of the District and the projects that we are involved with

RCM's approach to Construction Management Services is to analyze the goals, objectives, and timeframes of a project in order to develop a project scheme. We continuously monitor schedules, costs, and quality to ensure these goals and objectives are met for client satisfaction. This ensures that we deliver a quality project to the District on time, within budget and without litigation.

We are made up of employees who have the core values of ethical business practices in order to advise and respond to our client's needs. RCM staffs all projects with seasoned professionals who are provided with the latest training, tools, technology, and resources in order to perform and consistently exceed our client's expectations in all aspects of budget, schedules, timelines, and quality.

Business Profile

Newport Mesa Unified School District

Our team of professionals has successfully provided program management, construction management, Lease-Leaseback, CM multi-prime and design-build services on school projects in California. Our success is the result of our ability to combine professional management techniques with a builder's approach. This enables us to manage budgets, drive schedules, and ensure quality, while maintain strong relationships with all stakeholders.

Our philosophy is based on the reality that architecture and construction are inseparable, and that applying a thorough understanding of each is critical to success. Our staff includes program and construction managers, constructability review specialists, cost estimators, schedulers, and other planning, design, and construction professionals. This diversity of internal resources enables our firm to quickly find solutions to resolve project issues.

We have extensive experience within the California educational system providing planning, design and construction services from large multimillion dollar programs to small-scale single projects including new facilities, renovations and modernizations. Our portfolio of educational work has given us a keen insight into the policies, procedures and means of efficiencies within state agencies and other jurisdictions.

RCM has the experience to perform the required services. We recognize the importance of this assignment to the overall success of the District's short- and long-term planning and will provide our highly qualified team for the execution of required tasks. We believe our team can ensure success through the following advantages:

- Specific and relevant experience on similar higher education projects in Southern California
- Our in-house cost management staff
- Our team members have worked on renovation projects on an active college campus
- We believe in a team approach and collaborating with the District and its employees, including facilities planning, operations and maintenance staff, as well as architects, engineers, contractors, and consultants

As demonstrated herein, RCM's is renowned for its expertise in K-12 Construction Management services in counties all over the State of California. This success stems from our dedication to fully understand the unique complexities of each individual project. With this knowledge as our foundation, we can develop creative approaches and solutions that only years of continuous, hands-on experience can provide. Our insight and experienced in-house team of professionals is what differentiates RCM from our competition and generates positive results for our K-12 clients. RCM prides itself on being flexible regarding staffing and resources to ensure that the right fit, as well as price, are mutually agreed upon prior to the commencement of any services being performed

As with many of our services provided on an on-call/as-needed basis, we are highly experienced to accommodate the changing needs of our clients and any of our resources can be called upon to support the District when needed. RCM has extensive in-house resources that can be organized and assigned to any service request within 48 hours. RCM has worked on numerous programs and projects in which our services have been requested on a task order or work order basis, all of which have required quick, efficient, and high-quality responses. Through years of this type of experience, our organization has developed a structure designed to support our clients with expert resources at the very moment they are needed.

Business Profile

Newport Mesa Unified School District

Construction Management



The delivery of each project on budget, on schedule, and on quality is our primary goal for every client. RCM core philosophy is “Manage each project like we own it.” This means much more than administering a project by attending meetings and taking notes. Our project managers proactively lead, challenge,

and motivate teams to generate superb results that save money and time, mitigate risk, and achieve our clients’ delivery goals. Our core program and construction management tenets include:

Leadership — RCM knows that for a project team to be successful, it must be inspired, unified, and led with confidence and knowledge. To do all of this takes a strong and thoughtful leader. It is common in the industry for construction managers to be experts after the fact; at RCM our experienced project leaders have seen it all and are able to provide the foresight and vision necessary to avoid pitfalls, provide creative solutions, and protect our clients from claims and disputes.

Experience — RCM construction managers have extensive experience as former owners, contractors, developers, architects, and engineers, in all sectors of the construction industry. We combine this experience with proactive leadership to produce superior results.

Accountability — RCM holds our executives and our project teams accountable for results — no excuses. Nothing short of delivery on budget, on schedule, and on quality is an acceptable outcome.

Efficiency — Overstaffing the project management role is common in the industry, and results in redundancies and inefficiencies that in turn result in disputes. RCM right-sizes project staffing, holds the entire project team accountable, and supplements their efforts only where needed to provide our clients with seamless project delivery.

Work Plan — Regardless of the delivery method, the project manager primary role during construction will be to coordinate and monitor progress of the work and ensure the quality, schedule, and budget are maintained. Safety and security will also be a key concern, as well as ensuring that the construction work cause minimal disruption to the existing facilities.

Controls and Reporting — At RCM we tailor our extensive controls to mesh flawlessly with the controls of our clients, and to produce complete and transparent reporting, with full disclosure of all risks and opportunities. We do not impose the use of a single management system platform; instead, we use a variety of management systems and are always flexible. We do whatever it takes to meet or exceed our clients’ requirements.

From planning and design through construction and close out, RCM has the expertise and dedication needed to work as your devoted advocate and achieve the best possible results for your project.

OUR SERVICES INCLUDE:

Planning Phase

- Needs Assessment
- Master Planning
- Design Procurement
- Executive Reporting
- Master Scheduling
- Scope, Budget & Schedule Definition

Design Phase

- Design Management
- Budget Tracking & Estimate Analyses
- Constructability Review
- Peer Review
- Project Scheduling
- Monthly Reporting

Construction Phase

- Estimate Validation & Adjustments
- Construction Management
- Permits and Entitlements
- Risk Assessment
- GC Procurement and Negotiations
- Budget & Schedule Management
- Change Order Management
- Quality Assurance
- Move Management
- Project Close-out

Business Profile

Newport Mesa Unified School District

Cost Management & Estimating



Simply stated, our goal is to work on your behalf to minimize risk and maximize the value of your project. We achieve this through a unique, proactive approach to cost management. This disciplined approach is designed to add significant value to your bottom line; a relentless focus that is reflected in RCM guiding principles:

Proactive Approach — We have a proven track record of saving our clients time and money, while preserving project quality through our proactive approach to cost management. We plan, control, and manage project costs from conception through successful completion.

Detailed Budgets — Our comprehensive budget estimates are based on well-researched cost data and contain a level of detail more extensive than the industry standard. This ensures a realistic and accurate basis for the project and when combined with our comprehensive cost control services, prevents budget overruns.

Continuous Involvement — As an integral part of the design process, our continuous and disciplined management of project costs results in timely, well-informed design and business decisions. This approach leads to the early identification of potential cost issues, which in turn reduces the delays and expenses associated with unnecessary redesign.

Value Management — You will benefit from our creative value management techniques. Our efforts help to assure program integrity, preserve design intent and eliminate unnecessary project costs.

Efficiency — Overstaffing the construction management role is common in the industry, and results in redundancies and inefficiencies that in turn result in disputes. RCM right-sizes project staffing, holds the entire project team accountable, and supplements their efforts only where needed to provide our clients with seamless project delivery.

Forward-looking Solutions — When it comes to managing project costs, nobody likes surprises. Unlike others, we don't wait for the market to change. We accurately forecast market trends and advise our clients accordingly. Our continual analysis of productivity, material, labor, and micro and macro level market conditions ensure that our budgets and estimates are comprehensive and accurate.

State-of-the-Art Tools — RCM is at the forefront of the BIM revolution. We integrate with the 5D environment, creating cost models in collaboration with your entire project team to maximize value and minimize risk. Our team approach at the outset of design ensures an accurate basis for both cost and schedule, while providing a value-added review of constructability issues.

OUR SERVICES INCLUDE:

- Feasibility Studies & Conceptual Estimating
- Budget Development & Cost Planning
- Cost Estimating / Milestone Estimates
- Value Management/Market research
- Economic Forecasting/Market Reports
- Change Order Management
- Cost Control & Forecasting
- Pre- & Post-Contract Audit Services
- BIM 5D Cost Modeling
- Sustainable Cost Analysis



"After speaking to several construction management firms, we chose RCM Group for cost management services. We definitely-made the right choice. Will definitely be using there services again." Mark Gelsinger

Business Profile

Newport Mesa Unified School District

In a word, know-how.



RCM involvement begins during pre-planning and continues through design, bidding, construction, and close-out. RCM adds value every step of the way, from the initial meetings with key stakeholders and the procurement and management of designers and

contractors, to the continued monitoring of budget, schedule, and quality for the duration of the project.

Our unparalleled experience gives us a firsthand understanding of the unique challenges faced by cities, communities, designers, engineers and governing agencies. We address these challenges by establishing parameters for success as early in the process as possible. This approach takes into account everything from bond management and master planning to project completion and occupation. Our overall goal is to deliver an end result that maximizes value and minimizes risk.

Willing Partner — RCM works to understand each culture as we begin our partnership. We get involved with your District foundations and support your community efforts to improve your community experience.

Outreach Program — RCM develop, implement, and monitor small and/or community business outreach programs. We have resources available to develop and implement highly effective business outreach program begins with the clear delineation of project-specific contract goals and a further delineation of the reasonably available pool of well-qualified contractors by category.

Services — At its core, project management is the management of a project’s budget, scope and schedule. We are unique in that we provide in-house expertise in both cost management and project scheduling along with program and construction management, in a fully integrated package.

Experience — At RCM, our experienced experts have worked in the education sector for more than 30 years. They are supported by an in-house team of former owners, contractors, developers, architects, and engineers. We combine our experienced leadership with our broad geographical footprint, knowledge of current marketplace trends and technologies to provide superior results across the country.

Comprehensive Knowledge — Design standards for facilities are continually changing to accommodate the latest social, economic, and educational concerns. Our experience in this sector provides us with insights into these design trends and the impacts they can have on overall budgets.

Sustainability— Integral to our role in controlling costs is a thorough understanding of sustainability and LEED. We work with the design team to evaluate all sustainable design targets along with their impacts on capital and building life cycle costs.

“[RCM Group] has an experienced and dedicated group who work diligently to insure the owner receives a “first class” educational facility”

LBUSD “Alan Reising”

Business Profile

Newport Mesa Unified School District

Construction, know-how.



New Construction — RCM has completed millions of dollars' worth of these types of projects, and possesses a detailed understanding of the best practices, as well as both common and uncommon challenges, that apply to new construction projects on existing sites and new sites.

Modernization Projects — Nearly all of our school facility experience consists of modernization work. RCM has completed millions of dollars' worth of these types of projects, and possesses a detailed understanding of the best practices, as well as both common and uncommon challenges, that apply to modernization projects.

Modular Construction & Interim Housing — Most school programs involve some level of modular construction. We have provided project/construction management services for most of our California educational clients with construction programs, where projects included the installation of new modular units, infrastructure and ADA upgrades.

Facility Master Planning — RCM often supports the facility master planning effort provided by architects through our cost management team. We have performed these services for multiple Districts throughout the state.

Integrated Project Delivery — RCM has experience with every delivery method in use on school projects today, including CM Multiple Prime, Lease-Leaseback, Design Bid Build, JOC contracts and CM @ Risk

Division of the State Architect (DSA) — Our vast experience in the California K-12 and higher education sectors has given us the opportunity to understand the complex nature of working with State Regulatory Agencies such as DSA. We have a thorough understanding of the processes and procedures required by these agencies with regards to plan review, code interpretation, permitting, testing and inspection, construction phase changes, project closeout and agency certification. We have found that the best way to lead each project through this process is to develop professional, working relationships with the agency personnel.

Office of Public-School Construction (OPSC) — Because we have been performing project/construction services for so many years, we have been able to build excellent working relationships with all of the State agencies that govern public school construction.

State Allocation Board (SAB) — RCM monitors the SAB, attending monthly meeting or through debriefs on actions taken.

California Department of Education (CDE) — 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

“[RCM Group] has experienced professionals who understand the meaning of teamwork”

GUSD “Tony Barrios”

Project Staffing

Newport Mesa Unified School District

* Primary point of contact

Corporate Oversight	Title	Years' Experience	Degree/Licenses / Certs	Roles & Responsibilities	Estimated % Devoted to Project
* Jerry Roberts	President	20 +	B.S Civil Engineering (CSLA)	Principal-In-Charge	50% (No Charge)
Key Personnel	Title	Years' Experience	Degree/Licenses / Certs	Roles & Responsibilities	Estimated % Devoted to Project
Stephen Murray	Sr. Construction Manager	30 +	B.S CM (CPSLO) LEEP AP	Project Oversight	100%
Don Lyon	Sr. Construction Manager	30 +	B.S Business Management University of Redlands	Project Oversight	100%
Ashish Guha	Sr. Construction Manager	20 +	(USC), Marshall School of Business Master of Business Administration Michigan State University, East Lansing, MI Master of Science in Construction Management	Project Oversight	100%
Mario Mera	Sr. Construction Manager	30 +	B.S Civil Engineering - California State University, Long Beach	Project Oversight	100%
Dean Christman	Construction Manager	15 +	Doctorate in Business Administration Jones International University	Project Oversight	100%
Tim Green	Construction Manager	30 +	B.S Mechanical Engineering Arizona State University	Project Oversight	100%
Greg Ochoa	Construction Manager	20 +	B.S Construction Management Cal Poly Pomona	Project Oversight	100%

RCM is staffed with experienced, proficient employees who will ensure Newport Mesa Unified School District is provided with the highest level of support to reach its goals and objectives. This includes corporate oversight at all levels and corporate home office support on an as-needed basis. RCM will devote 100% of our time by monitoring every detail of the day-to-day operations to make sure all projects are completed on time within the scope of work and under budget.

Project Staffing

Newport Mesa Unified School District

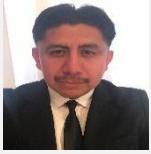
Corporate Home Office Support	Title	Years' Experience	Degree/Licenses / Certs	Roles & Responsibilities	Estimated % Devoted to Project
Edward Segura	Chief Cost Manager	25 +	Bachelor's in Landscape Architecture California State Polytechnic University	Estimating and Cost Management	As Needed
Trent Carr	Design Manager	25 +	Bachelor's Degree in Architecture (UNAM)	Project Design/Project Oversight	As Needed
George Escano	Sr. Project Scheduler	35 +	Bachelor's in Architecture (Univ of Santo Tomas)	Scheduling	As Needed
Veronica Gomez	Auto CADD Drafter	10 +	B.S Interior Design (WWC)	Field support services in coordination with Project Controls and BIM Management	As Needed
Victor Montenegro	Assistant Project Manager	10 +	B.S CM (CSLB)	Project Engineering	As Needed
Jason King	Project Superintendent	20 +	B.S Civil Engineering	Project Oversight	100%
Regina Swheska	Labor Compliance	20 +	Associate Arts degree in Business Administration, Pasadena City College	Labor Compliance	As Needed



Proposed Personnel/Firm Team

Newport Mesa Unified School District

Bios of RCM staff professionals that possesses both individual and collective experience providing Construction/Project Management services to K-12 school districts. Full resumes have been attached



Mr. Roberts has been involved with the design and construction industry for over 25+ years providing capital bond improvement oversight and coordination, program management, project management, construction management, design management, executive and senior construction supervision, and site coordination of \$1 Billion dollar projects for all phases of design and construction. He is responsible for managing capital improvement projects and programs, and oversees operations for RCM California education program and project management



Greg is a construction management professional with 20+ years of extensive experience in capital construction and facilities renovations. He brings with him strong leadership on all aspects of the construction management life-cycle from concept through design into construction and close-out, including DSA certification as well as a variety of delivery methods including multi-prime, design-bid-build and lease-leaseback. He has managed over \$300M in construction projects.



Mr. Mera has over 30+ years of experience in the education and public work sector. During his tenure, his work history includes senior roles with some of the several country's largest education and public works projects (i.e., MTA Los Angeles Metro Red Line Subway Project, LAUSD School Construction Program, Oxnard School District, Los Angeles Mid Corridor project, Phoenix Light Rail Project, and Los Angeles Community College District) utilizing various project delivery methods including Design-Build, JOC and CM Multiple Prime. He has managed over \$500M in projects



Mr. Guha has over 20+ years of experience in the education and public work sector. His work history includes senior roles with some of the largest educational and public works projects (Los Angeles County + University of Southern California Medical Center, Port of Long beach, Michigan State construction program, Pasadena Unified School District and Los Angeles Unified School District) utilizing various project delivery methods including JOC, Design-Bid-Build and CM Multiple prime. He has managed over \$1B in construction projects.



Mr. Ross is an accomplished Sr. Construction Manager with over 30+ years of construction experience working in both capacities, as a private developer, construction manager and owner's representative for multiple school districts projects (Los Angeles Unified School District, Glendale Unified School District, Inglewood Unified School District and Orange Unified School District. and University California Los Angeles utilizing various project delivery methods including JOC, Design-Bid-Build and CM Multiple prime. He has managed over \$500M in construction projects.



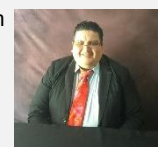
Mr. Escano 35+ years of experience providing scheduling services for construction projects for General Contractors, Design Firms and Owners representative that includes all aspects of scheduling phases with a total of \$3B in construction.



Mr. Murray has 30+ years of relevant work experience providing leadership, vision, planning, and execution for premier U.S. General Contractors, Engineering, Real Estate Development and PM/CM firms in both the building and transportation sectors. Stephen is a "Hand On, Servant Leader" Construction Management Professional that brings experience in providing Project Management, Construction Management, Design Management, Design-Build Management, and Field Supervision (Superintendent) / Site Coordination on numerous multi-million-dollar projects.



Mr. Green is a seasoned construction manager professional with over 30+ years of experience who operates with the discipline and precision of an Army Ranger which he happens to be as well. He has managed over \$700M in construction projects. Tim has led critical construction programs for construction management teams. He has worked in both capacities as a general contractor and owner's representative for multiple school districts utilizing CM Multiple Prime, Lease-Leaseback and Design Bid-Build.



Dr. Garcia is a construction management professional with over 15+ years of construction experience. He is adept in practicing as an owner's representative and has extensive experience as a season leader. Dr. Garcia has led critical construction programs and facilities operations. He is significant leadership background on large complex program ranging from \$1M to \$500M utilizing Design-Bid-Build, CM Multiple Prime and fast-track integrated project delivery method.



Mr. Soares' 17 years of experience working on complex construction projects throughout Canada and the US ranges from Programming New Facilities, Master Planning, Site Analysis, Feasibility Studies, Design, Pre-construction, Construction, Budgeting as well as Project Scheduling from the Pre-Design phase through Project Close-out. In addition, he has extensive experience in Project Planning, LEED accredited projects, CEQA, Historic buildings/sites, Land use Development, Design & Construction Documents, Constructability Reviews, Bidding/Negotiation, Contracts/Agreements, Bid Analysis and Contract Award



Mr. Segura has 25+ years of combined professional experience in preparing construction cost estimates in estimating, change order cost estimates, reviewing & analyzing contractor cost proposals & claims. Establishing negotiating position & assist OARs in negotiations of claims & change orders with contractors. Experience estimating multiple scopes self perform work disciplines with advanced knowledge of CSI master format. His experience in estimating values of \$1 Million to \$1.5 Billion for various southern California School Districts, Civil, Transportation, JPL/NASA, Federal Aviation Administration/U.S. Customs Border Protection Programs (Supporting all Regions), Federal, Regional, & Local Agencies.



JERRY ROBERTS

SR. CONSTRUCTION MANAGER

Jerry is a dynamic professional with a strong background in the construction industry with over twenty years of experience in providing project management, construction management, design management, executive and senior construction supervision and site coordination of multi-million dollar projects of all phases of design and construction.

His main focus for the past 15 years has been Community College and K-12 public works construction projects responsible for managing over a \$Billion worth of Capital Bond Program Construction and other respective construction programs and projects throughout his career.

He is very familiar with many delivery methods, including Design, Bid Build, Design-Build, 17460 Lease-Leaseback and CM Multi-Prime as well as the benefits of each. Jerry possesses the ability to effectively direct workflow at all stages of project development and execution. With proven success at spearheading simultaneous initiatives; through superior organization, prioritization, and management skills, he is experienced in collaborating with colleagues and clients to ensure clear communication, accurate project planning, execution, and customer satisfaction make him an invaluable asset to any team.

EDUCATION

Bachelors of Science in Civil Engineering, California State University, Los Angeles, Los Angeles, CA

RELEVANT PROJECT EXPERIENCE

Jerry has provided program, project, and/or construction management oversight services on each of the following Southern California K-14 and Community College programs and projects, among others:

- Anaheim Union High School District, Measure Z \$330M Bond Program, Anaheim, CA
- Long Beach Unified School District Measure K \$1.5B Bond Program, Long Beach, CA
- Norwalk la Mirada, Measure G & S \$375M Bond Program, Norwalk, CA
- Culver City Unified School District, Measure CC \$106M Bond Program, Culver City, CA
- Santa Monica Unified School District, Measure BB \$568M Bond Program, Santa Monica, CA
- Orange Unified School District, Measure S \$288M Bond Program, Orange, CA
- Kerman Unified School District Measure K \$30M Bond Program, Fresno, CA
- Glendale USD, Measures K and S \$278M Bond Programs, Glendale, CA
- Los Angeles USD, Multi-Billion Bond Programs, Los Angeles, CA
- Los Angeles CCD, Multi-Billion Measure A/AA & J Bond Programs, CA
- Rancho Santiago CCD, Measure E & Q \$500M Bond Program, Santa Ana, CA
- South Orange CCD, Measure J \$500M Bond Program, Orange, CA
- Occidental College, \$200M Capital Improvements Program, Eagle Rock, CA



Stephen Ross

Sr. CONSTRUCTION MANAGER

Mr. Ross is a construction management professional with 30+ years of extensive experience in capital construction and facilities renovations. He possesses strong organizational and excellent communication skills honed through years of experience in a wide range of public school and private industry settings. Specializing in complex projects involving sophisticated stakeholders, nuanced communication, and political sensitivity.

He brings with him strong leadership on all aspects of the project management life cycle – from concept through design, into construction and close-out, including DSA certification as well as a variety of delivery methods including multi-prime, design-bid-build, and Lease-leaseback. His experience in program management from project sequencing, feasibility, master budgeting, scope confirmation, equipment specification, installation, testing, labeling, start-up, and commissioning as well as collaboration for High Performance Schools (CHPS) oversight.

Stephen interpersonal relationship skills and “get the job done” attitude make him an asset on any project team. He is equally adept in working with executives as he is with school faculty, staff, architects, designers, engineers, and contractors. Greg delivers projects professionally, successfully and on-time.

EDUCATION

Bachelor's in Construction Management Cal Poly Pomona - 2000

PROJECT EXPERIENCE

Glendale Unified School District, Glendale CA
New Construction, Modernization and ADA Upgrades

\$160M

Sr. Construction Manager
Rancho Campana High School

Project oversight for a new for a new \$61 Million lease-leaseback delivery, CHPS project. Environmental and Natural Science building consisting of biomedical/biotechnology research and development, and pre-medical sciences, supported with laboratories, process waste system, various water systems, various gas systems, fume hood systems. New Performing Arts Complex building consisting of drama and music departments supported by the various electronic equipment, media, design arts, performing arts, and production/management for the arts.

Aquatics Centers, Adolfo Camarillo & Hueneme High Schools

Project oversight for a new \$8M (bundled) twin aquatic centers; Construction of two new aquatic facilities each including – 8556sf pool (25yds by 30 meters) and associated concrete decks. The build out of bathhouse, storage, coach's office, locker rooms, and mechanical rooms (3800sf), and walk ramps, as well as other accessibility improvements across campuses, utilizing the lease-leaseback delivery. ***Project won 2015 Project Achievement Award-Public Works under \$10M***

Multi-School Information Technology Upgrade

Project oversight for IT upgrades on six campuses concurrently valued at \$8 Million. Managed and met E-rate requirements. Scope of work included to acquire the services of an experienced and qualified network system Integrator(s) to provide, install, configure, and warranty new network electronics (WAN, LAN, and WLAN) and



DEAN CHRISTMAN

Mr. Christman is an accomplished, high-energy, goal-oriented Construction Management Professional with over fifteen years of experience in executing construction projects as a general contractor and owner's representative on behalf of the district. He possesses strong organizational and excellent communication skills honed through years of experience in a wide range of public school and private industry settings.

He brings with him strong leadership on all aspects of the construction management life cycle – from concept through design, into construction and close-out, including DSA, OSHPD & LEED certification as well as a variety of delivery methods including hard bid, multi-prime and design-bid-build.

Dean's interpersonal relationship skills and **"get the job done"** attitude make him an asset on any project team. He is equally adept in working with executives as he is with school faculty, staff, architects, designers, engineers, and contractors. Dean continuous to successfully complete projects and on-time and under budget and is a season leader with a team approach.

EDUCATION

Bachelor of Science in Civil Engineering, Georgia Tech – 2003

EDUCATION EXPERIENCE

San Diego Unified School District – San Diego, CA

\$50M+

Project Manager

Responsible for over \$50M in construction at San Diego Unified School District that included new construction, modernization, HVAC upgrades and new portables.

- Responsible for the project budget and schedule to meet the construction schedule. Reviewed project budget monthly and ensures that the budget accurately reflects the project status
- Reviewed submittals from contractors to ensure the submittal were submitted per the District's specification and Standards
- Managed the daily activities of the sub contractor's
- Managed the construction schedules and submittals process, and coordinated the responses to the sub-contractors RFI's
- Managed the monthly progress payments for the contractor, architects, engineers, and any other consultants
- Responsible for all facets of the pre-construction, bid and award, construction, and close-out phase of the project
- Reviews pre-construction documents and submits comments to Designer as necessary
- Responsible to prepare monthly reports to upper management on the status of the project
- Coordinated with public agencies during pre-construction and construction; DSA
- Reviewed sub-contractor changed order proposals to ensure costs were fair and accurate and managed the project budgets
- Addressed any schedule impacts in accordance with the project specifications in a timely manner

Sweet Water Union High School District – Chula Vista Ca

Construction Manager

Responsible for three ground-up school projects that achieved LEED Silver or Higher for the districts Proposition O Bond Program

- Responsible for the project budget and schedule to meet the construction schedule.
- Reviewed project budget monthly and ensures that the budget accurately reflects the project status
- Reviewed submittals from contractors to ensure the submittal were submitted per the District's specification and Standards
- Managed the daily activities of the contractor
- Responsible for the weekly project meeting minutes
- Managed the construction schedules and submittals process, and coordinated the responses to the contractors RFI's
- Managed the monthly progress payments for the contractor, architects, engineers, and any other consultants
- Responsible for all facets of the pre-construction, bid and award, construction, and close-out phase of the project
- Reviews pre-construction documents and submits comments to Designer as necessary
- Responsible to prepare monthly reports to upper management on the status of the project
- Coordinated with public agencies during pre-construction and construction; DSA
- Reviewed contractor changed order proposals to ensure costs were fair and accurate and managed the project budgets
- Addressed any schedule impacts in accordance with the project specifications in a timely manner
- Managed the project close-out with respect to project certification with the Division of State Architects (DSA)
- Management of the project budget with the Project Manager
- Responsible for coordination of project addendums and bulletins
- Responsible for project safety
- Met with various construction representatives, Site Safety Reps, Site Superintendents, and Quality Control Managers to discuss construction work, activities, and issues
- Responsible for updating the project documents, as-built's and posting RFI's
- Continuously reviewed construction contract documents, drawings, specifications, and support documents to assist in managing the projects
- Managed the project closeout and punch-list

SOFTWARE

AutoCAD, BIM, Photoshop (Adobe Software) Microsoft Office, Primavera 6, RMS, Excel, Wor



ASHISH GUHA

SR. CONSTRUCTION MANAGER

Mr. Guha has over 20 years of experience in the education and public works sector. During this tenure, his work history includes senior roles with some of the several country's largest education and public works projects (Los Angeles County+University of Southern California Medical Center, Port of Long beach, Michigan State Construction Program, Pasadena USD and Los Angeles County – Internal Services Department (ISD) utilizing various project delivery methods including JOC, Design-Build and Design-Bid-Build and has managed over \$1B in construction successfully.

He has also managed teams addressing multitudes of issues that he functions as a good communicator and more importantly, a good listener. His extensive experience and knowledge of construction makes him an asset to any project and a team leader.

EDUCATION

University of Southern California (USC), Marshall School of Business, Los Angeles, CA
Master of Business Administration - 2013

Michigan State University, East Lansing, MI
Master of Science in Construction Management – 2001

MANIT (National Institute of Technology) Bhopal, India
Bachelor of Architecture, Civil Engineering – 1998

PROJECT EXPERIENCE

Los Angeles County Internal Service Department, Los Angeles CA

\$100M

Sr. Project Manager

Part of \$1.2B multi-year Deferred Maintenance program, managed all aspects of 16 projects including scope, design, schedule, and budget development to complete projects through Job Order Contracting (JOC) and Design-Build (D-B) delivery methods for Los Angeles County Internal Services Department (LACO-ISD).

- Reviewed contractor proposal to ensure proposal reflects actual scope of work.
- Led review and approval with Public Works - Building and Safety to handoff to JOC construction.
- Reviewed 60% and 90% JOC and D-B Construction Documents (CD) to ensure compliance with Detailed Scope of Work (DSOW). Performed value engineering of three Heating, Ventilation, Air-Conditioning (HVAC) Units and interior light fixtures to ensure Title 24+10% compliance.
- Coordinated with Maintenance and Operations (M&O) division of ISD and recommended single ply Atactic Polypropylene (APP) torch down cool roof system to comply with Title 24 + 10% compliance.
- Developed project specifications, design criteria for County-wide ACC projects for Epoxy installation
- Communicated with Southern California Edison (SCE) to ensure compliance with SCE guidelines in projects.
- Established procedure to procure temporary power generators for three ACC projects in accordance with ISD and ACC guidelines.

- Developed project specifications, design criteria for 45 Ton HVAC Unit in collaboration with Maintenance and Operations (M&O) division of ISD. Coordinated with multiple stakeholders – Facilities Team, M&O, and IT to ensure that 14 weeks of lead time is appropriately utilized.
- Conducted partnering session with end-user to ensure seamless department shutdowns
- Developed criteria for pre-design mechanical and electrical survey of 93 Units for basis of design
- Led weekly progress meetings, prepared weekly reports for clients to keep stakeholders updated on progress.
- Ensured deficiencies from Strategic Asset Management (SAM) database are incorporated in design scope.
- Act as owner's representative with primary responsibility for all phases of assigned projects
- Assist in the development and management of project strategic plans and program initiatives to meet the goals and needs of the client.
- Manage and coordinate all aspects of the project, including the budget, schedule, operational needs, procedures, client standards, sustainability design, and QA/QC program requirements
- Coordinate with the architect, contractor, and county team members to meet the project objectives and resolve issues.
- Responsible to review, understand, and manage procedures for handling changes to the contract documents, monthly valuations, drawing submissions, change orders and substitution.
- Document the status of the project, as well as all meetings and correspondence, to effectively communicate within the project team and develop the project documents.
- Coordinated work with Consultants, Contractors and Owner
- Construction Administration (answered RFIs, processed Contractor's submittals & Change Orders)

Key Projects:

- **Animal Care Center (ACC) Projects:**
Managed six projects simultaneously and a team of 15 senior consultants and contractors to complete scope and design assessment within tight deadlines.
- **Centro Mara villa Service Center Program:**
First project to be executed under the Energy Efficient Project Services Master Agreement (EEPMA), led a team of 12 senior consultants to oversee JOC and D-B scoping document. Achieved Title 24 + 10% energy savings requirements.
- **ISD – Facilities Projects:**
Managed three projects simultaneously and a team of 10 senior consultants and contractors to complete scope and design assessment within tight deadlines.

Los Angeles County Department of Public Works, Los Angeles CA

\$400M

Project Manager

Responsible for the execution of multiple projects ranging from \$8M to \$165M for the Los Angeles County Department of Public Works (LADPW)

- Prepared monthly reports to upper management with respect to the status and/or progress of the projects.
- Managed multiple project budget and schedules to meet districts standards and timelines
- Managed engagement contract by evaluating technical skills and standards of pre-project proposals. Provided recommendations for the selection of compliant goods and services to meet specific client requirements
- Monitored project budget monthly and ensure that the budget accurately reflects the project status/progress
- Improved processed by implementing energy efficient techniques to build Security Command and Control Center (SCCC) at Port of Long Beach resulting in reduction in overall energy usage by 30%



DON LYON

SR. CONSTRUCTION MANAGER

Don Lyon is an accomplished Sr. Construction Manager with experience in Education, Hospitals, Institutional and Government facilities (Federal, State and local). He has worked in both capacities, in a general contractor capacity, to construction manager and owner's representative for multiple school districts projects ranging from \$35 million to in excess of \$200 million.

Over the course of his career, Don has developed a solid reputation in assessing project problems and resolutions that arise during design and construction, to commissioning/startup and close-out of those projects. Having this expertise at the beginning of a project increases opportunities for success; having this expertise in interceding on troubled projects works to also re-establish project goals. He brings a comprehensive level of knowledge, expertise, and understanding of DSA, including LEED and CHPS, and OSHPD.

EDUCATION

Bachelor's Business Management University of Redlands - 1985

RELEVANT PROJECT EXPERIENCE

Santa Monica-Malibu Unified School District Modernization and ADA Upgrades

\$20M

Sr. Construction Manager

Responsible for the high school modernizations, HVAC and building upgrades. Total of 8 buildings, plus a major retrofit of their Concert Hall declared "historically significant" project.

- Managed multiple facility projects for SMMSD. Construction projects ranged from renovations, sidewalk repairs, parking lot asphalt replacement, and major rehabilitation projects.
- Responsible for bringing a total 8 projects within budget and schedule
- Prepared monthly reports to upper management with respect to the status and/or progress of the projects.
- Coordinated projects with the Department of State Architect (DSA) for periodic inspections during construction and CCD Process
- Managed multiple project budget and schedules to meet the District's standards and timelines
- Monitored project budget on a monthly basis and ensure that the budget accurately reflects the project status/progress
- Coordinated and managed the District delivery of related fixtures, furniture and equipment (FF&E)
- Hosted Pre-Bid Job walks with potential contractors and discussed project scope and answered questions for multiple projects and coordinated with various District, Project and College staff
- Worked closely with A/E Team to Developed Pre-Solicitation Contract packages which include full Statement of Work (SOW), As Built Drawings, Sketches, Specifications, and any other supporting documentation.
- Reviewed and negotiated contractor change order proposal and submitted to district on a timely manner. reviews and addresses any and all Schedule impacts in accordance with the project specifications in a timely manner
- Manages daily activities of the general contractor, reviewed contractors' weekly/monthly construction schedules for impacts to the baseline schedule.

- Reviewed RFIs/Submittals on various construction activities to ensure critical answers were addressed and material was onsite per approved schedule.
- Managed the project close-out and project certification with the Division of State Architects (DSA) and project financial close out through the district

University of California Los Angeles, UCLA

\$30M

Sr. Construction Manager

Responsible for the construction of their new surgical wing.

- Reviewed design packages at various levels of design phase (35%, 50%, 65%, 95%, 100%) and provided thorough detailed comments on the drawings, Design Analysis, Specs, and any additional cut-sheets.
- Managed the construction activities as well. Duties: Oversee the contractor's work, managed underground civil construction activities, coordinated the work with the contractor and the engineers, processed change orders, reviewed bids and recommended award contracts.
- Coordinated the work with the contractor, engineers and inspectors for approval, provided the constructability reviews.
- Prepared daily reports on the project status, conducted weekly meeting and prepared meeting minutes, reviewed and analysis the contractor's claims and presented the findings. Ensured the safety compliance of the project.
- Monitored project budget on a monthly basis and ensure that the budget accurately reflects the project status/progress
- Coordinated and managed the college delivery of related fixtures, furniture and equipment (FF&E)
- Hosted Pre-Bid Job walks with potential contractors and discussed project scope and answered questions for multiple projects and coordinated with various College staff

Central Region, Los Angeles Unified School District, Los Angeles, CA

\$250M +

OAR II

- Responsible for the project budget and schedule to meet the construction schedule. Reviewed project budget on a monthly basis and ensures that the budget accurately reflects the project status
- Reviewed submittals from contractors to ensure the submittal were submitted per the District's specification and Standards
- Managed the daily activities of the contractor
- Managed the construction schedules and submittals process, and coordinated the responses to the contractors RFI's
- Managed the monthly progress payments for the contractor, architects, engineers and any other consultants
- Responsible for all facets of the pre-construction, bid and award, construction and close-out phase of the project
- Reviews pre-construction documents and submits comments to Designer as necessary
- Responsible to prepare monthly reports to upper management on the status of the project
- Coordinated with public agencies during pre-construction and construction; DSA
- Reviewed contractor changed order proposals to ensure costs were fair and accurate and managed the project budgets
- Addressed any schedule impacts in accordance with the project specifications in a timely manner
- Managed the project close-out with respect to project certification with the Division of State Architects (DSA)

Key Projects:

- **MCCD Technology Center (\$40m):** New Construction: State of the art library and technology center. Project was built as a General Contractor. Approximately 40,000 square feet; situated on sloping terrain, multiple stories, below grade utility facility, integrated systems into campus facilities for ease of access.
- **Helen Bernstein HS#1 (\$100m):** New construction, five story campus; Approximately 140,000 square feet-Classrooms/Admin/Gymnasium/Athlete field and Track/Competitive swimming pool, AG/UG parking/Central



MARIO MERA

SR. CONSTRUCTION MANAGER

Mr. Mera has over 30 years of experience in the education and public works sector. During this tenure, his work history includes senior roles with some of the several country's largest education and public works projects (i.e., MTA Los Angeles Metro Red Line Subway Project, LAUSD School Construction Program, Oxnard School District, Los Angeles Alameda Mid-Corridor Project, Phoenix Light Rail Project and Los Angeles Community College District) utilizing various project delivery methods including Design-Build, Design-Bid-Build, JOC, CM Multiple Prime.

EDUCATION

Bachelor of Science, Civil Engineering - California State University, Long Beach 1988

PROJECT EXPERIENCE

Oxnard School District, Oxnard CA

New Construction, Modernization and ADA Upgrades

\$130M +

Program Management

Sr. Project Manager for the addition of New Construction, Modular Buildings and Modernization of existing buildings at four different district school sites for Oxnard Measure A&D \$450M construction bond program.

- Act as owner's representative with primary responsibility for all phases of assigned projects
- Assist in the development and management of project strategic plans and program initiatives to meet the goals and needs of the client.
- Manage and coordinate all aspects of the project, including the budget, schedule, operational needs, procedures, client standards, sustainability design, and QA/QC program requirements
- Coordinate with the architect, contractor, and facilities team members to meet the project objectives and resolve issues.
- Assist in the submission of statutory project documentation to obtain approvals related to the project work.
- Responsible to review, understand, and manage procedures for handling changes to the contract documents, monthly valuations, drawing submissions, change orders and substitution.
- Document the status of the project, as well as all meetings and correspondence, to effectively communicate within the project team and develop the project documents.
- Coordinated work with Consultants, Contractors and Owner
- Construction Administration (answered RFIs, processed Contractor's submittals & Change Orders)

Key Projects:

- Lemonwood Elementary School full campus reconstruction project: \$42.2M
- Elm Elementary School full campus reconstruction project: \$32.9M
- McKinna Elementary School full campus reconstruction project: \$36.5M
- Marshall Elementary School New Classroom Building project: \$12M
- Brekke Elementary School New Modular Kindergarten Project: \$1.9M
- McAuliffe Elementary School New Modular Kindergarten Project: \$2.6M
- Ramona Elementary School New Modular Kindergarten Project: \$2.2M
- Ritchen Elementary School New Modular Kindergarten Project: \$2.7M

Los Angeles Community College District, Los Angeles CA
New Construction and ADA Upgrades

\$150M +

Project Manager II

Responsible for the effective and successful construction management of \$98M Design-Build: East Parking Structure, LADWP Substation, East Campus Ground Improvements, and PV Solar System and \$120M Design/Build and Design/Bid/Build Multi Phase Project: Construction Technology Building Facilities and PV Solar System

- Prepared monthly reports to upper management with respect to the status and/or progress of the projects.
- Managed multiple project budget and schedules to meet districts standards and timelines
- Monitored project budget monthly and ensure that the budget accurately reflects the project status/progress
- Met with various construction representatives, Site Safety Reps, Site Superintendents, and Quality Control Managers to discuss construction work, activities, and issues
- Continuously analyzed new approaches and solutions and devised new or improved techniques for overcoming difficult issues and problems
- Coordinated and managed the district delivery of related fixtures, furniture, and equipment (FF&E)
- Hosted Pre-Bid Job walks with potential contractors and discussed project scope and answered questions for multiple projects and coordinated with city and state departments
- Worked closely with A/E Team to Developed Pre-Solicitation Contract packages which include full Statement of Work (SOW), As Built Drawings, Sketches, Specifications, and any other supporting documentation.
- Administers provisions of Professional Service Agreements between Architects and the district
- Reviewed and negotiated contractor change order proposal
- Reviewed and addressed all Schedule impacts in accordance with the project specifications in a timely manner
- Addressed any schedule impacts in accordance with the project specs in a timely manner
- Manages daily activities of the general contractor, reviewed contractors' weekly/monthly construction schedules for impacts to the baseline schedule.
- Reviewed RFIs/Submittals on various construction activities to ensure critical answers were addressed and material was onsite per approved schedule.
- Responsible for DSA project closeout

Los Angeles unified School District, Los Angeles CA

\$85M +

Owner Authorize Representative

Owner's representative for LAUSD \$650M BB Bond Program & \$89M Measure K Program: Region-3 (formerly District-D)

- Responsibilities included development of a Master Plan and effective implementation of the design development and construction program.
- Responsible for the selection of team members and for providing direction and management of a team of professional consultants (Engineers, Architects, Estimators, Schedulers, Document Controllers and Administrators, Construction Managers, Office Engineers, and others) which rendered services in the following areas: design management, construction management, project controls, estimating, contract administration, and document control.
- Responsible for ensuring the effective and efficient performance of staff through all phases of program execution from the development of budgets, to the development of design, to the completion of construction



GREG OCHOA

CONSTRUCTION MANAGER

Greg is a construction management professional with 25+ years of extensive experience in capital construction and facilities renovations. He possesses strong organizational and excellent communication skills honed through years of experience in a wide range of public school and private industry settings. Specializing in complex projects involving sophisticated stakeholders, nuanced communication, and political sensitivity.

He brings with him strong leadership on all aspects of the project management life cycle – from concept through design, into construction and close-out, including DSA certification as well as a variety of delivery methods including multi-prime, design-bid-build, and Lease-leaseback. His experience in program management from project sequencing, feasibility, master budgeting, scope confirmation, equipment specification, installation, testing, labeling, start-up, and commissioning as well as collaboration for High Performance Schools (CHPS) oversight.

Greg’s interpersonal relationship skills and “get the job done” attitude make him an asset on any project team. Greg is equally adept in working with executives as he is with school faculty, staff, architects, designers, engineers, and contractors. Greg delivers projects professionally, successfully and on-time.

EDUCATION

Bachelor's in Construction Management Cal Poly Pomona - 2000

PROJECT EXPERIENCE

Oxnard Unified School District, Oxnard CA
New Construction, Modernization and ADA Upgrades **\$160M**

Sr. Construction Manager
Rancho Campana High School

Project oversight for a new for a new \$61 Million lease-leaseback delivery, CHPS project. Environmental and Natural Science building consisting of biomedical/biotechnology research and development, and pre-medical sciences, supported with laboratories, process waste system, various water systems, various gas systems, fume hood systems. New Performing Arts Complex building consisting of drama and music departments supported by the various electronic equipment, media, design arts, performing arts, and production/management for the arts.

Aquatics Centers, Adolfo Camarillo & Hueneme High Schools

Project oversight for a new \$8M (bundled) twin aquatic centers; Construction of two new aquatic facilities each including – 8556sf pool (25yds by 30 meters) and associated concrete decks. The build out of bathhouse, storage, coach’s office, locker rooms, and mechanical rooms (3800sf), and walk ramps, as well as other accessibility improvements across campuses, utilizing the lease-leaseback delivery. ***Project won 2015 Project Achievement Award- Public Works under \$10M***

Multi-School Information Technology Upgrade

Project oversight for IT upgrades on six campuses concurrently valued at \$8 Million. Managed and met E-rate requirements. Scope of work included to acquire the services of an experienced and qualified network system Integrator(s) to provide, install, configure, and warranty new network electronics (WAN, LAN, and WLAN) and

IPTV/digital signage system. scope encompasses the selection, detailed design, deployment, test & commissioning, and ongoing manufacturer maintenance of a greenfield campus local area network, wireless network and IPTV distribution platform that appropriately extends and integrates with the central District IT architecture, which provides for access to District applications, security infrastructure and the Internet. Upgrade of structured cabling for all campuses, Power over Ethernet (POE) switch conversions, wireless access points (for BYOD), core switch and UPS upgrades.

- Prepared monthly reports to upper management with respect to the status and/or progress of the projects.
- Managed multiple project budget and schedules to meet districts standards and timelines
- Monitored project budget monthly and ensure that the budget accurately reflects the project status/progress
- Continuously analyzed new approaches and solutions and devised new or improved techniques for overcoming difficult issues and problems
- Coordinated and managed the district delivery of related fixtures, furniture, and equipment (FF&E)
- Hosted Pre-Bid Job walks with potential contractors and discussed project scope and answered questions for multiple projects and coordinated with City departments
- Worked closely with A/E Team to Developed Pre-Solicitation Contract packages which include full Statement of Work (SOW), As Built Drawings, Sketches, Specifications, and any other supporting documentation.
- Administers provisions of Professional Service Agreements between Architects and the district
- Reviewed and negotiated contractor change order proposal
- Reviewed and addressed all Schedule impacts in accordance with the project specifications in a timely manner
- Manages daily activities of the general contractor, reviewed contractors' weekly/monthly construction schedules for impacts to the baseline schedule.
- Reviewed RFIs/Submittals on various construction activities to ensure critical answers were addressed and material was onsite per approved schedule.

San Bernardino Unified School District – Santa Monica, CA

\$50M

Construction Manager

Responsible for a new \$51 Million junior high school expansion using the cm multi-prime delivery method. Scope included 11 new classroom buildings, administration, gymnasium, and library.

Los Angeles unified School District, Los Angeles CA

\$100M +

Owner Authorize Representative

Managed modernization, ADA projects and projects with the Facilities Access Compliant unit.

Facilities Access Compliance Unit

While working with the Program Management branch; was able to deliver numerous projects on 77 separate campuses on time and under budget using the Job Order Contract method of delivery. Under my purview, the unit was able to Identify savings JOC brings through administration costs, program management costs, reduced legal disputes, reduced change orders, time, and increased flexibility to achieve organizational objectives.

Modernization Portfolio Projects

Responsible for management of projects at various school sites. Projects included restroom renovations, boiler upgrades, lighting upgrades, science lab upgrades, athletic field renovation, fire alarm, intrusion, PA, LAN/WAN, fiber optics, IT and network systems upgrades. These projects were awarded using the various methods including design/bid/build & Job Order contracting. Also, served as Field Engineer/Inspector.



TIM GREEN, DBA

CONSTRUCTION MANAGER

Mr. Green is a season construction management professional with over 30 years of experience who operates with the discipline and precision of an Army Ranger, which he happens to be as well. He is adept in practicing as owner's representative and has extensive experience as a season leader. Tim has led critical programs for construction management teams, multi-discipline design teams, and facilities operations teams. He has worked in both capacities, in a general contractor capacity and owner's representative for multiple school districts, university and public work projects ranging from \$1 million to in excess of \$300 million utilizing design-bid-build, design-build and fast-track integrated project delivery methods that includes DSA.

EDUCATION

Bachelor's in Mechanical Engineering Arizona State University - 1992

CERTIFICATIONS, LICENSES & AFFILIATIONS

State of California - General Engineering Contractor, B General Building Contractor, C 20 HVAC Contractor, C 36 Plumbing Contractor, 30 Hour OSHA Certification

International Code Council - ICC Commercial Building Inspector, ICC Commercial Mechanical Inspector, ICC Commercial Plumbing Inspector, ICC Residential Inspector

Arizona Register of Contractors - CR 39 Dual Air Conditioning & Refrigeration Contractor, KB-2 School (Dual) Residential & Commercial Building Contractor.

United States Military, Army Ranger - U.S Army 1984– 1988

PROJECT EXPERIENCE

UCLA Construction Program, Los Angeles CA
Modernization and ADA Upgrades

\$100M

Sr. Construction Manager

Managing multiple construction projects ranging from new student housing construction, renovations, sidewalk repairs, parking lot asphalt replacement, and HVAC rehabilitation projects throughout the University.

- Coordinated projects with the Department of State Architect (DSA) for periodic inspections during construction and CCD Process
- Managed multiple project budget and schedules to meet the Universities standards and timelines
- Monitored project budget monthly and ensure that the budget accurately reflects the project status/progress
- Reviewed design packages at various levels of design phase (35%, 50%, 65%, 95%, 100%) and provided thorough detailed comments on the drawings, Design Analysis, Specs, and any additional cut-sheets.
- Managed a total of 10 employees underneath my position where I served full responsibility of the actions of these employees. Project Engineers, Cost Estimators, Project Schedulers, Asst. PM etc.
- Continuously analyzed new approaches and solutions and devised new or improved techniques for overcoming

difficult issues and problems

- Prepared monthly reports to upper management with respect to the status and/or progress of the projects.
- Reviewed pre-construction documents and coordinated comments to Designer to implement constructability review comments
- Reviewed and negotiated contractor change order proposal and submitted to district on a timely manner.
- Reviewed and addressed all Schedule impacts in accordance with the project specifications in a timely manner
- Reviewed and process monthly pay application to ensure accurate work completed
- Managed daily activities of the general contractor, reviewed contractors' weekly/monthly construction schedules for impacts to the baseline schedule.
- Managed the project close-out and project certification with the Division of State Architects (DSA) and project financial close out through the district

Santa Monica Unified School District – Santa Monica, CA

\$150M

Sr. Construction Manager

Responsible for the new construction of Santa Monica High School, modernization of Webster ES, Point Dume ES and Malibu MS at Santa Monica Unified School District.

- Managed multiple facility projects for SMMSD. Construction projects ranged from renovations, sidewalk repairs, parking lot asphalt replacement, and major rehabilitation projects.
- Responsible for bringing a total 8 projects within budget and schedule
- Prepared monthly reports to upper management with respect to the status and/or progress of the projects.
- Responsible for personnel, facilities, plant maintenance (including the LEED® Green air pollution control system) and the operating environment within the public-school sector
- Coordinated projects with the Department of State Architect (DSA) for periodic inspections during construction and CCD Process
- Managed multiple project budget and schedules to meet the District's standards and timelines
- Monitored project budget monthly and ensure that the budget accurately reflects the project status/progress
- Coordinated and managed the District delivery of related fixtures, furniture, and equipment (FF&E)
- Hosted Pre-Bid Job walks with potential contractors and discussed project scope and answered questions for multiple projects and coordinated with various District, Project, and College staff
- Worked closely with A/E Team to Developed Pre-Solicitation Contract packages which include full Statement of Work (SOW), As Built Drawings, Sketches, Specifications, and any other supporting documentation.
- Reviewed and negotiated contractor change order proposal and submitted to district on a timely manner. reviews and addresses all Schedule impacts in accordance with the project specifications in a timely manner



VICTOR MONTENEGRO

ASSISTANT PROJECT MANAGER

Over 10 years' experience as an Assistant Project Manager/Coordinator for large and medium school construction projects. Victor's expertise in managing relationships and coordination with district facilities, school principals, contractors, subcontractors, DSA inspectors, public agencies and architects makes him an evaluable asset to any project. Participates in construction meetings, assist in move management, reviews project budgets, change orders, review project schedules and resolves project obstacles to ensure that the work is performed in accordance with contract documents and district standards.

EDUCATION

Bachelor of Science in Construction Engineering Management,
California State University Long Beach, Long Beach, CA - 2007

PROJECT EXPERIENCE

Assistant Project Manager, Long Beach Unified School District, Measure K Bond Program
Budget: HVAC/Modernization Upgrade \$16 Million

Assisted the construction manager on project oversight for the Long Beach Unified School District's Measure K HVAC Upgrade and Modernization program, including the execution of lease-leaseback contracts at John Muir ES/MS.

- John Muir ES/MS HVAC Modernization upgrades to bldgs. 1000, 2000, 3000, Auditorium and Kitchen which consisted of 3 phases. Work consisted of HVAC System Installation, Utility Upgrades, ADA – Accessibility Upgrades, Fire Alarm Upgrades, Intercom, Clocks, Speakers Ceiling/Wall Mounted Projectors/AV System, Ceiling Repair, Interior Lights, Interior and Exterior Painting, New windows and other State Funded Repairs

Assistant Project Manager, Long Beach Unified School District, Measure E Bond Program
Budget: HVAC/Modernization Upgrade \$19 Million

Assisted the construction manager for construction of HVAC modernization projects at 2 school sites at Long Beach Unified School District. Formed relationship with School personnel (Facilities Director, Principal, Office Staff, Teachers and Community Representatives). Maintained the Orion Control Manager modules by composing letters, Construction Directives, weekly project meetings minutes, input RFI's and Submittals and processed PCO's and CO's and Contractor's Pay Applications. Administered training in Orion to coworkers, as needed. Attended job kick-off meetings, performed site walks, and maintained project as-built drawings to track project progress. Maintained rapport with Inspectors and conducted field walks to ensure Contractor complied with safety regulations

- Barton Elementary HVAC/Modernization upgrades to bldgs. A, B, C, Auditorium and Kitchen which consisted of 5 phases. Work consisted of HVAC System Installation, Utility Upgrades, ADA – Accessibility Upgrades, Fire Alarm Upgrades, Intercom, Clocks, Speakers Ceiling/Wall Mounted Projectors/AV System, Ceiling Repair, Interior Lights, Interior and Exterior Painting, New windows and other State Funded Repairs.

- Lindsey Academy HVAC/Modernization upgrades to bldgs. B, C, Auditorium and Kitchen which consisted in 2 phases. Work consisted of HVAC System Installation, Utility Upgrades, ADA – Accessibility Upgrades, Fire Alarm Upgrades, Intercom, Clocks, Speakers Ceiling/Wall Mounted Projectors/AV System, Ceiling Repair, Interior Lights, Interior and Exterior Painting, New windows and other State Funded Repairs.

Project Engineer, Inglewood Unified School District

Budget: New Construction \$60 Million

Project Engineer for construction of a new school at Inglewood Unified School District. Formed relationship with School personnel (Facilities Director, Principal, Office Staff, Teachers and Community Representatives) to simplify the Construction process. Conducted field walks to monitor construction progress. Responsible for receiving and processing document control in an accurate and efficient manner. Prepared written materials including correspondence, reports, and logs pertaining to the project. Reviewed Submittal packages. Maintained database and report generation for Inspection Requests, Submittals and Concrete Break Testing. Compiled data analysis for Certified Payroll and Labor Compliance and participated in Subcontractor Review Audits. Monitored Daily Field Reports and activity. Attended weekly Construction update meetings. Facilitated the Relocation from the old school (21 bungalows) into the new facilities and coordinated the move management for every bungalow. Completed the Closeout process.

Project Coordinator, LAUSD

Budget: \$32 Million

Assisted the OAR with the construction of a new school in the South Region of LAUSD by providing efficient operation of jobsite administration. Utilized Primavera P-3 to revise baseline schedule. Provided project documentation control through Expedition by processing and tracking correspondence, transmittals, meeting minutes, daily reports, change orders, RFI's, RFP's, submittals, meeting minutes and PCO's. Reviewed sub-contractors schedule updates in line with project baseline schedule. Responsible for providing information concerning contracts, bonds, insurance, licenses, and specifications to project team in a timely fashion. Maintained records and files on construction projects and provide FF&E support. Attended weekly progress meetings and coordinate progress related issues with project team. Attended monthly training classes on various subjects. Reviewed and processed Pay Applications.

Project Engineer, Long Beach City College

Budget: Central Plants - \$55 Million Infrastructure Project:

Assisted the Senior CM with multiple projects from the Planning, Design, Construction, and Closeout phases. Installed Infrastructure loop for entire North campus (approximately 2-10 feet wide and up to 7 feet deep) to furnish data/communications, electrical power, and gas to the north part of campus. This work included trenching and deep excavation work, placing conduit for data/communications, electrical power, and gas. Worked closely with Contractor, sub-contractors, and office personnel.

Maintained the Primavera Control Manager modules by composing letters, Construction Directives, weekly project meetings minutes, input RFI's and Submittals and processed PCO's and CO's and Contractor's Pay Applications. Administered training in Expedition to coworkers, as needed. Attended job kick-off meetings, performed site walks a project as-built drawings to track project progress. Maintained rapport with Inspectors and conducted field walks to ensure Contractor complied with safety regulations.

SOFTWARE

AutoCAD, BIM, Photoshop (Adobe Software) Microsoft Office, Primavera 6, RMS, Excel, Word

Experience

Newport Mesa Unified School District

RCM staff has provided construction management services to some of the following school districts: Los Angeles Unified School District (LAUSD), Long Beach Unified School District (LBUSD), Glendale Unified School District (GUSD), Fillmore Unified School District (FUSD) and Alta Loma Unified School District

Sector	Client Name	Project Name	Type of Project	Scope of work	Delivery Method	Year	Original Project Cost	Final Project Cost	Completed
K12	Alta Loma School District	Deer Canyon ES	Modernization	Portables upgrades to include fire alarm and interior finishes	CM Multiple Prime	2020	\$4.7M		Yes
K12	Alta Loma School District	Banyan ES	Modernization	Classroom upgrades to include fire alarm and interior finishes	CM Multiple Prime	2020	\$3.1M		Yes
K12	Alta Loma School District	Hermosa ES	Modernization	Classroom upgrades to include fire alarm and interior finishes	CM Multiple Prime	2020	\$4.6M		Yes
K12	Alta Loma School District	Vineyard JHS	Modernization	Classroom upgrades to include fire alarm and interior finishes	CM Multiple Prime	2019	\$7.1M	\$7.2M (2%)	Yes
K12	Alta Loma School District	Deer Canyon New Classroom Addition	New Construction	New wing addition to existing bldg.	CM Multiple Prime	2019	\$4.5M	\$4.6M (2%)	Yes
K12	LAUSD	Various M&O Modernization Upgrades (700 Schools)	Modernization	Upgrades to classrooms, Roofs, Restroom, Playgrounds & ADA upgrades	CM Multiple Prime, JOC, DBB, Planning & Design	2020	\$250M +		In-Progress
K12	Fillmore USD	New CTE Project	New Construction	New construction of 2 story CTE Bldg.	Design Bid Build	2020	\$16M		In-Progress
K12 (Private)	St Joseph Catholic School	HVAC Campus Upgrade	Modernization	Bldg. HVAC Upgrades, Interior/Fire Alarm/ADA Upgrades	CM Multiple Prime	2019	\$1M	\$850K (1.5%)	Yes
K12	LBUSD	Muir ES/MS HVAC Campus Upgrade	Modernization	Bldg. HVAC Upgrades, Interior/Roof/Fire Alarm/ADA Upgrades. Includes roof replacement	CM Lease, Leaseback	2019	\$18M		Yes
K12	LBUSD	Barton ES/HVAC Campus Upgrade	Modernization	Bldg. HVAC Upgrades, Interior/Fire Alarm/ADA Upgrades. Includes Roof replacement	CM Lease, Leaseback	2018	\$12M	\$12.2M (2%)	Yes
K12	LBUSD	Lindsey Academy ES/HVAC Campus Upgrades	Modernization	Bldg. HVAC Upgrades, Interior/Roof/Fire Alarm/ADA Upgrades. Includes roof replacement	CM Lease, Leaseback	2018	\$6M	\$6.1M (1.5%)	Yes
K12	LBUSD	Educare Bldg. - New Construction	New Construction	New 2 Story bldg., 18 Classrooms & New Parking Lot	CM Lease, Leaseback	2017	\$17M	\$17.3M (3.5%)	Yes
University	Occidental College	Norris Chemistry Building	Modernization	HVAC Upgrades, Fume Hoods, Electrical, Plumbing, New Chiller & Interior/Fire Alarm Upgrades. Includes roof replacement	CM Multiple Prime	2017	\$20M	\$20.5M (2.5%)	Yes
K12	Glendale USD	Hoover HS	New Construction	New 2 story Bldg. to include 20 Classrooms, Technology and A/V System, Student and Staff Restrooms and staff parking lot	CM Lease, Leaseback	2017	\$17M	\$17.5M (3%)	Yes
K12	LBUSD	Twain ES	Modernization	New 2 story Bldg. to include 20 Classrooms, Technology and A/V System, Student and Staff Restrooms and staff parking lot	CM Lease, Leaseback	2021	\$17M		Summer 2021

Recent Projects

Newport Mesa Unified School District

PROJECT EXPERIENCE HIGHLIGHT:

FILLMORE HS CTE PROJECT

DESCRIPTION

Constructing of two new career technical education buildings on Fillmore High School's existing campus. The new structures will replace existing obsolete facilities. The project is comprised of two buildings, with a courtyard between the structures. The larger building is two story, 12,687 square feet, with an elevator and exposed structural steel frame. The educational amenities for this building include a wood shop, welding shop, green-house and associated classrooms. The smaller building is a one story, 8,512 square foot auto shop with five service bays. Educational facilities include an engine lab, vehicle alignment system and vehicle lifts.

SERVICES PROVIDED

RCM Group providing Construction Management services.

ISSUES / CHALLENGES / LESSONS LEARNED

Challenges that have been overcome to the project included a small site with extremely limited space for construction materials and field offices. The space constraints were overcome by doing the soils work to get both building pads compacted and approved, and then staggering the construction sequence of the buildings so that the Auto Shop Building pad could serve as a staging area for the Welding / Woodshop / Ag Building's structural frame. DSA delays have been overcome by starting the deferred approval process early and by frequent and diligent monitoring and communication with DSA staff.



Fillmore High School

Client:	Fillmore Unified School District
Type:	HS CTE Project
Size (SF):	New Construction 20,000 sqft
Delivery Method:	Design Bid Build
Start Date:	January 2020
Completion Date:	July 2021
Project Cost:	\$16M Currently @ 1% of Change Orders
Architect:	West Group Designs
Contacts:	Adrian E. Palazuelos, Ph.D. Superintendent (FUSD) Ph: 805.524.6000 Ana-Lilia Mendoza – Architect PH: 949.250.0880

Construction Management projects in progress or completed within the past 5 years

Recent Projects

Newport Mesa Unified School District

Construction Management projects in progress or completed within the past 5 years

PROJECT EXPERIENCE HIGHLIGHT:

MUIR HVAC MODERNIZATION PROJECT

DESCRIPTION

The Long Beach Unified School District's \$1.5 Billion Measure E bond program. Program is to improve outdated classrooms, improving technology/labs/career education classrooms/electrical/wiring; upgrading handicapped accessibility/earthquake safety; upgrading bathrooms, fire alarms/sprinklers/security cameras; removing lead paint/asbestos; installing air conditioning; improving student health/physical education; repairing/constructing/acquiring facilities/equipment

SERVICES PROVIDED

RCM Group provide construction management services for John Muir ES/MS HVAC Modernization upgrades to bldgs. 1000, 2000, 3000, Auditorium and Kitchen which consisted of 3 phases. Work consisted of HVAC System Installation, Utility Upgrades, ADA – Accessibility Upgrades, Fire Alarm Upgrades, Intercom, Clocks, Speakers Ceiling/Wall Mounted Projectors/AV System, Ceiling Repair, Interior Lights, Interior and Exterior Painting, New windows and other State Funded Repairs

ISSUES / CHALLENGES / LESSONS LEARNED

Due to the overwhelming DSA/SCE/LBWD review process for multiple school sites. DSA/SCE/LBWD was delaying the review process on critical approvals to keep the project on schedule. RCM was instrumental in solving these challenges by having a great relationship with these disciplines and acquiring timely approvals to keep the project on schedule.



MULTIPLE SCHOOL SITES AT LBUSD

Program:	The \$1.5 Billion Measure E Bond Program
Client:	Long Beach Unified School District
Type:	HVAC Modernization Project
Size (SF):	All Classroom Buildings, Cafeteria & Auditorium
Delivery Method:	Lease Lease Back Balfour Beatty
Start Date:	August 2019
Completion Date:	December 2020
Project Cost:	\$18M \$18.5M (3% of Change Orders)
Architect:	NAC Architects
Contacts:	David Miranda-Director of Facilities Ph: 562.997.7550 David Hopkins – Architect PH: 323.475.8075

		Long Beach Unified School District																		
Position	Base Contract Rate	2019							2020										Extended Rate	
		Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	April	May	June	July	Aug	Sept	Oct	Nov	Dec		
Construction Management Key Personnel																				
Project Executive	No Fee	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$ -	
Construction Manager	\$125	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	0.50	0.50	\$ 280,000	
Fee Structure	SUBTOTAL	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	0.50	0.50	\$ 280,000	

Our fees are developed based on staffing needs and timelines approved by the District leading to an hourly not-to-exceed proposal. Staffing is adjustable and will follow the project needs which results in cost savings to the District. Our Fees include the cost of scheduling, cost estimates, constructability reviews and project closeout thru DSA.

Recent Projects

Newport Mesa Unified School District

PROJECT EXPERIENCE HIGHLIGHT:

BARTON EDUCARE PROJECT

DESCRIPTION

The Long Beach Unified School District's \$1.5 Billion Measure E bond program. Program is to improve outdated classrooms, improving technology/labs/career education classrooms/electrical/wiring; upgrading handicapped accessibility/earthquake safety; upgrading bathrooms, fire alarms/sprinklers/security cameras; removing lead paint/asbestos; installing air conditioning; improving student health/physical education; repairing/constructing/acquiring facilities/equipment

SERVICES PROVIDED

RCM Group provide construction management services. Project consist of New Construction of a two story Modular Administrative Building, (16) modular classroom buildings and site infrastructure improvements, including shade structures at Barton High school. Project was bid out as a Lease-Leaseback. To facilitate the construction of the new 2 story structure the site required the removal of existing portable classrooms to temporary locations on campus.

ISSUES / CHALLENGES / LESSONS LEARNED

Due to the overwhelming DSA/SCE/LBWD review process for multiple school sites. DSA/SCE/LBWD was delaying the review process on critical approvals to keep the project on schedule. RCM was instrumental in solving these challenges by having a great relationship with these disciplines and acquiring timely approvals to keep the project on schedule.



MULTIPLE SCHOOL SITES AT LBUSD

Program:	The \$1.5 Billion Measure E Bond Program
Client:	Long Beach Unified School District
Type:	New Construction
Size (SF):	36,000 square feet
Delivery Method:	CM Multiple Prime
Start Date:	
Completion Date:	July 2018
Project Cost:	\$17M \$17.5M (3% of Change Orders)
Architect:	Perkins Eastman
Contacts:	David Miranda-Director of Facilities Ph: 562.997.7550 Yuji Iko – Architect PH: 714.824.3560

Construction Management projects in progress or completed within the past 5 years

Recent Projects

Newport Mesa Unified School District

PROJECT EXPERIENCE HIGHLIGHT:

BARTON HVAC MODERNIZATION PROJECT

DESCRIPTION

The Long Beach Unified School District's \$1.5 Billion Measure E bond program. Program is to improve outdated classrooms, improving technology/labs/career education classrooms/electrical/wiring; upgrading handicapped accessibility/earthquake safety; upgrading bathrooms, fire alarms/sprinklers/security cameras; removing lead paint/asbestos; installing air conditioning; improving student health/physical education; repairing/constructing/acquiring facilities/equipment

SERVICES PROVIDED

RCM Group provide construction management services for Barton Elementary HVAC/Modernization upgrades to bldgs. A, B, C, Auditorium and Kitchen which consisted of 5 phases. Work consisted of HVAC System Installation, Utility Upgrades, ADA – Accessibility Upgrades, Fire Alarm Upgrades, Intercom, Clocks, Speakers Ceiling/Wall Mounted Projectors/AV System, Ceiling Repair, Interior Lights, Interior and Exterior Painting, New windows and other State Funded Repairs.

ISSUES / CHALLENGES / LESSONS LEARNED

Due to the overwhelming DSA/SCE/LBWD review process for multiple school sites. DSA/SCE/LBWD was delaying the review process on critical approvals to keep the project on schedule. RCM was instrumental in solving these challenges by having a great relationship with these disciplines and acquiring timely approvals to keep the project on schedule.



MULTIPLE SCHOOL SITES AT LBUSD

Program:	The \$1.5 Billion Measure E Bond Program
Client:	Long Beach Unified School District
Type:	HVAC Modernization Project
Size (SF):	All Classroom Buildings, Cafeteria & Auditorium
Delivery Method:	Lease Lease Back
Start Date:	June 2018
Completion Date:	July 2019
Project Cost:	\$12M \$12.2M (2% of Change Orders)
Architect:	GBA Architects
Contacts:	David Miranda-Director of Facilities Ph: 562.997.7550 David Bannon – Architect PH: 714.665.8030

Construction Management projects in progress or completed within the past 5 years

Recent Projects

Newport Mesa Unified School District

PROJECT EXPERIENCE HIGHLIGHT:

LINDSEY HVAC MODERNIZATION PROJECT

DESCRIPTION

The Long Beach Unified School District's \$1.5 Billion Measure E bond program. Program is to improve outdated classrooms, improving technology/labs/career education classrooms/electrical/wiring; upgrading handicapped accessibility/earthquake safety; upgrading bathrooms, fire alarms/sprinklers/security cameras; removing lead paint/asbestos; installing air conditioning; improving student health/physical education; repairing/constructing/acquiring facilities/equipment

SERVICES PROVIDED

RCM Group provide construction management services for Lindsey Academy HVAC/Modernization upgrades to bldgs. B, C, Auditorium and Kitchen which consisted in 2 phases. Work consisted of HVAC System Installation, Utility Upgrades, ADA – Accessibility Upgrades, Fire Alarm Upgrades, Intercom, Clocks, Speakers Ceiling/Wall Mounted Projectors/AV System, Ceiling Repair, Interior Lights, Interior and Exterior Painting, New windows and other State Funded Repairs.

ISSUES / CHALLENGES / LESSONS LEARNED

Due to the overwhelming DSA/SCE/LBWD review process for multiple school sites. DSA/SCE/LBWD was delaying the review process on critical approvals to keep the project on schedule. RCM was instrumental in solving these challenges by having a great relationship with these disciplines and acquiring timely approvals to keep the project on schedule.



MULTIPLE SCHOOL SITES AT LBUSD

Program:	The \$1.5 Billion Measure E Bond Program
Client:	Long Beach Unified School District
Type:	HVAC Modernization Project
Size (SF):	All Classroom Buildings, Cafeteria & Auditorium
Delivery Method:	Lease Lease Back
Start Date:	June 2018
Completion Date:	December 2018
Project Cost:	\$6M \$6M (1% of Change Orders)
Architect:	GBA Architects
Contacts:	David Miranda-Director of Facilities Ph: 562.997.7550 David Bannon – Architect PH: 714.665.8030

Construction Management projects in progress or completed within the past 5 years

Recent Projects

Newport Mesa Unified School District

PROJECT EXPERIENCE HIGHLIGHT:

HOOVER HIGH SCHOOL

DESCRIPTION

The \$270 Million Measure S Bond Program was utilized as part of the School District's Overcrowding Relief Grant (ORG) program including Interim housing and the execution of 10 new facilities. Program also included Modernization, New Construction and Technology upgrades at 30 school sites throughout the district.

SERVICES PROVIDED

RCM Group provide construction management services for The Hebert Hoover High School ORG Classroom Building. The design is based on providing seven new classrooms designed to support the campus technology program in a new two story stand-alone facility. To facilitate the construction of a new two-story structure the site required the removal court. In addition, the construction contract included the development of a central courtyard that incorporated new student facilities around an existing campus softball field.

ISSUES / CHALLENGES / LESSONS LEARNED

Due to the overwhelming DSA review process for multiple districts. DSA was delaying the review process on critical deferred approvals and construction change directives to keep the project on schedule. RCM was instrumental in solving these challenges by having a great relationship with DSA personal and acquiring timely approvals to keep the projects on schedule and save the district thousands of dollars.



MULTIPLE SCHOOL SITES AT GLENDALE USD

Program:	The \$270 Million Measure S Bond Program
Client:	Glendale Unified School District
Type:	New Construction
Size (SF):	15,000 square feet
Delivery Method:	Lease/Leaseback
Completion Date:	2017
Project Cost:	\$17M \$17.5M (3% of change orders)
Architect:	Architecture 9
Contacts	Tony Barrios - Director of Facilities Ph:818.507.0201 Mark Gelsinger -Architecture 9 Ph:918.800-9325

Construction Management projects in progress or completed within the past 5 years

Recent Projects

Newport Mesa Unified School District

PROJECT EXPERIENCE HIGHLIGHT:

JOHN MUIR ELEMENTARY SCHOOL

DESCRIPTION

The \$270 Million Measure S Bond Program was utilized as part of the School District's Overcrowding Relief Grant (ORG) program including Interim housing and the execution of 10 new facilities. Program also included Modernization, New Construction and Technology upgrades at 30 school sites throughout the district.

SERVICES PROVIDED

RCM Group provide construction management services for the Muir Elementary School ORG Classroom Building design is based on providing eight new classrooms to support the campus needs in a new two-story stand-alone facility. To facilitate the construction of a new two-story structure the site required the removal of four portable classrooms to temporary locations on campus scheduled for removal from the site prior to project completion.

ISSUES / CHALLENGES / LESSONS LEARNED

Due to the overwhelming DSA review process for multiple districts. DSA was delaying the review process on critical deferred approvals and construction change directives to keep the project on schedule. RCM was instrumental in solving these challenges by having a great relationship with DSA personal and acquiring timely approvals to keep the projects on schedule and save the district thousands of dollars.



MULTIPLE SCHOOL SITES AT GLENDALE USD

Program:	The \$270 Million Measure S Bond Program
Client:	Glendale Unified School District
Type:	New Construction
Size (SF):	13,000 square feet
Delivery Method:	Lease/Leaseback
Start Date:	July 2016
Completion Date:	July 2017
Project Cost:	\$8M \$8.2M (3% of change orders)
Architect:	Architecture 9
Contacts	Tony Barrios - Director of Facilities Ph:818.507.0201 Mark Gelsinger -Architecture 9 Ph:918.800-9325

Construction Management projects in progress or completed within the past 5 years

Recent Projects

Newport Mesa Unified School District

PROJECT EXPERIENCE HIGHLIGHT:

NORRIS MEP & HVAC MODERNIZATION PROJECT

DESCRIPTION

The project consists of MEP and HVAC renovation to a 1950's 4 story Norris Chemistry Building. Laboratory upgrades were completed while the building was occupied for classes and research. The project delivery method was a design-assist project. Project included 18 new Fume hood exhaust, new HVAC and Boiler upgrades, new hot water and chilled water piping throughout, additional eye-wash and safety shower stations, new consolidated stack exhaust systems that provides N+1 redundancy and replace 40+ individual exhaust fans, air handling equipment, new heating, gas, hot water piping and portable water systems installed at each floor.

SERVICES PROVIDED

RCM Group provide Construction Management Services

ISSUES / CHALLENGES / LESSONS LEARNED

Due to the age of the building, close coordination has been of the utmost importance for the University role in this project. Built in 1952, one of the largest challenges has been the multi-levels of acreage on this site. The lack of ADA compliant drop off areas from the street, ADA compliant on-site parking/drop off zone and no ADA compliant pedestrian access from the street. RCM has been instrumental in solving these challenges by managing the surveying, design development phase and construction.



NORRIS BUILDING

Client:	Occidental College
Type:	MEP & HVAC Modernization Project
Size (SF):	36,000
Delivery Method:	CM Multiple Prime
Start Date:	January 2017
Completion Date:	December 2017
Project Cost:	\$18M \$18.5M (3% of Change Orders)
Architect:	Tailor Engineering
Contacts:	Greg Ochoa-Facilities Ph: 323.259.2500

Construction Management projects in progress or completed within the past 5 years

Recent Projects

Newport Mesa Unified School District

PROJECT EXPERIENCE HIGHLIGHT:

NORRIS MEP & HVAC MODERNIZATION PROJECT

DESCRIPTION

The project consists of MEP and HVAC renovation to a 1950's 4 story Norris Chemistry Building. Laboratory upgrades were completed while the building was occupied for classes and research. The project delivery method was a design-assist project. Project included 18 new Fume hood exhaust, new HVAC and Boiler upgrades, new hot water and chilled water piping throughout, additional eye-wash and safety shower stations, new consolidated stack exhaust systems that provides N+1 redundancy and replace 40+ individual exhaust fans, air handling equipment, new heating, gas, hot water piping and portable water systems installed at each floor.

SERVICES PROVIDED

RCM Group provide Construction Management Services

ISSUES / CHALLENGES / LESSONS LEARNED

Due to the age of the building, close coordination has been of the utmost importance for the University role in this project. Built in 1952, one of the largest challenges has been the multi-levels of acreage on this site. The lack of ADA compliant drop off areas from the street, ADA compliant on-site parking/drop off zone and no ADA compliant pedestrian access from the street. RCM has been instrumental in solving these challenges by managing the surveying, design development phase and construction.



NORRIS BUILDING

Client:	Occidental College
Type:	MEP & HVAC Modernization Project
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Project Cost:	\$18M \$18.5M (3% of Change Orders)
Architect:	Tailor Engineering
Contacts:	Greg Ochoa-Facilities Ph: 323.259.2500

Construction Management projects in progress or completed within the past 5 years

Recent Projects

Newport Mesa Unified School District

PROJECT EXPERIENCE HIGHLIGHT:

Program Manager, Planning & Design

DESCRIPTION

The Long Beach Unified School District’s \$1.5 Billion Measure E bond program. Program is to improve outdated classrooms, improving technology/labs/career education classrooms/electrical /wiring; upgrading handicapped accessibility/earthquake safety; upgrading bathrooms, fire alarms/sprinklers/security cameras; removing lead paint/asbestos; installing air conditioning; improving student health/physical education; repairing/constructing/acquiring facilities/equipment

SERVICES PROVIDED

RCM Group provided planning & design services for multiple design and construction projects from planning through execution of K-12 programs/projects as ‘Owners Representative’ for Long Beach USD under the current Measure E & K \$2.7 Billion Bond Programs

Multiple HVAC Modernization upgrades to numerous school sites through-out the district. Planning & Design consisted of HVAC System Installation, Utility Upgrades, ADA – Accessibility Upgrades, Fire Alarm Upgrades, Intercom, Clocks, Speakers Ceiling/Wall Mounted Projectors/AV System, Ceiling Repair, Interior Lights, Interior and Exterior Painting, New windows and other State Funded Repairs to numerous school sites throughout the district.



City of Long Beach
California
Long Beach Unified School District Map
April 2009

Map Legend:
Blue outline: District boundary
Blue outline: School site boundary
Blue outline: Other boundary

MULTIPLE SCHOOL SITES AT LBUSD	
Program:	The \$1.5 Billion Measure E Bond Program
Client:	Long Beach Unified School District
Type:	HVAC Modernization Project
Size (SF):	All Classroom Buildings, Cafeteria & Auditorium
Delivery Method:	Lease Lease Back
Start Date:	October 2017
Completion Date:	December 2020
Project Cost:	\$75M Panning & Design Projects
Architect:	Numerous
Contacts:	David Miranda-Director of Facilities Ph: 562.997.7550



Recent Projects

Newport Mesa Unified School District

PROJECT EXPERIENCE HIGHLIGHT:

Program Manager, Planning & Design

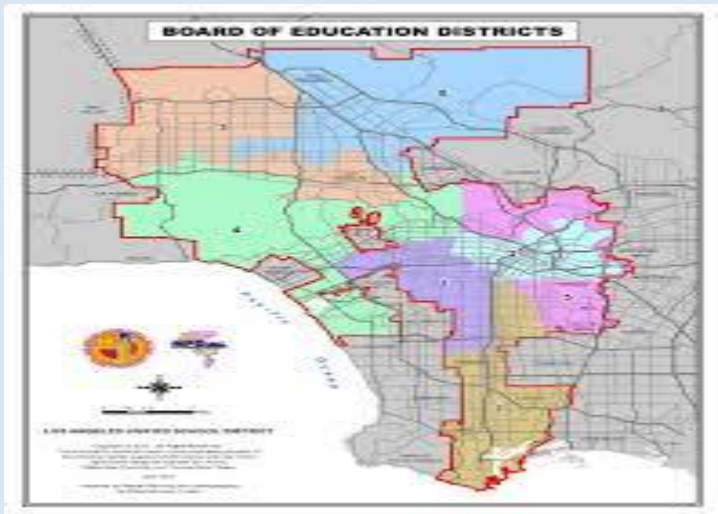
DESCRIPTION

The Los Angeles Unified School District's \$7 Billion Measure RR bond program. Program is to upgrade, modernize and replace aging and deteriorating school facilities, update technology, and address facilities inequities.

SERVICES PROVIDED

RCM Group is currently providing planning & design services as staff augmentation for multiple design and construction projects from planning through execution of K-12 programs/projects as 'Owners Representative' for Los Angeles USD under the current Measure EE & RR \$7 Billion Bond Program.

To update classrooms/labs/technology for 21stcentury learning; implement COVID-19 facility safety standards; address school facility inequities; reduce asbestos, earthquake and water quality hazards; and replace/renovate aging school classrooms/buildings, shall Los Angeles Unified School District's measure.



MULTIPLE SCHOOL SITES AT LAUSD	
Program:	The \$7 Billion Measure RR Bond Program
Client:	Los Angeles Unified School District
Type:	Modernization/Repair Projects
Size (SF):	All 700+ School Sites
Delivery Method:	TBD
Start Date:	January 2021
Completion Date:	December 2025
Project Cost:	\$250M + Planning & Design
Architect:	Numerous
Contacts:	Socorro Leano Ph: 213.241.1000

Project and Cost Management

Newport Mesa Unified School District

Include an hourly fee rate schedule within the proposal that includes an hourly rate for each proposed team member. Below is a listing of our all-inclusive hourly rate schedule for Construction Management services:

Billing Rates	
Below is a listing of our all-inclusive hourly rate schedule for Construction Management services	
Title	Hourly Rate
Principle in Charge	no charge
Project Executive	no charge
Sr. Construction Manager	\$125
Construction/Project Manager	\$120
Assistant Project Manager	\$115
Project Engineer	\$110
QA/QC	\$95
Scheduling	\$90
Cost Manager (composite rate)	\$90
Constructability Review	\$85
Project Controls/Document Controls/Labor Compliance Managers/Design Draftsman	\$80
Contract Administrator	\$70
Administrative Support	\$50

Fee Structure

Our typical fee structure for educational construction projects where we performed construction/project management services are between 3% and 6% of construction hard cost, depending on the scope of services provided, budgets, and schedules, as well as project delivery method. Although our fees typically end up within these ranges we don't not actually charge our fees on percentage basis. Our fees are developed based on staffing needs and timelines approved by the District leading to an hourly not-to-exceed proposal. Staffing is adjustable and will follow the project needs which results in cost savings to the District.



Project consist of New Construction of a two story Modular Administrative Building equipped with an Elevator and (16) modular classroom buildings by American Modular Systems (AMS)

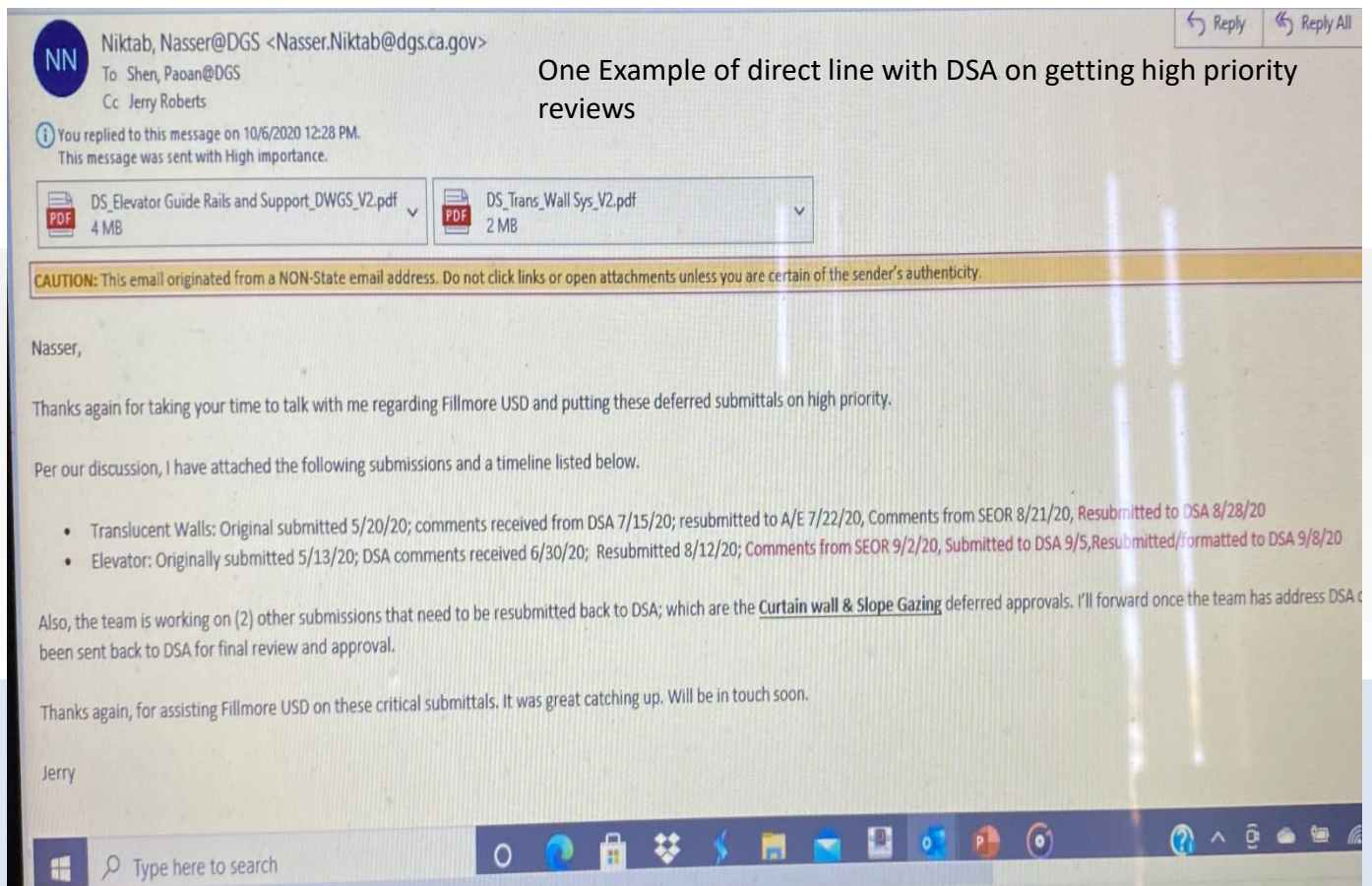
Project and Cost Management

Newport Mesa Unified School District

Division of the State Architect (DSA)

RCM has been working closely with DSA. Mr. Roberts was the DSA Liaison for LAUSD and established with DSA a strategic management plan that enabled future projects, deferred approvals and CCD's to get high priority on critical submissions. Mr. Roberts has maintained a close relationship and earned the respect of not only DSA Field Engineers, but also Regional Managers plus several past and present State Architects. Mr. Roberts has continued to assist LBUSD, LAUSD & FUSD on getting approvals through DSA and not affecting the project schedule's. In the past, we have successfully appealed DSA field code interpretations. We were able to do so in a professional manner so as not to create a negative relationship with the DSA Field Engineer whose decision we were appealing. Understanding and having a relationship with DSA is **"Priceless"**. RCM will bring this experience to your district.

As demonstrated herein, RCM's is renowned for working closely with DSA. This success stems from our dedication to fully understand the unique complexities of each individual project working closely with the assigned DSA project IOR and DSA Field engineers. With this knowledge as our foundation, we understand the DSA inspector card functionality and our projects completed by RCM have been DSA closed and certified within 4 months of giving the Notice of Completion.



Project and Cost Management

Newport Mesa Unified School District

Team Partnership

At RCM, we believe in Team Partnership. All projects that the firm has managed under construction have been completed on time and under budget. Every project receives our full and undivided attention. This allows us to guarantee the work and provides clients with assurance that they made the right choice. RCM construction managers go above and beyond our scope of services. We pride our self's on our Leadership, Experience, Partnering with the District, Contractor, IOR & Architect to create the mindset of "Getting the Job Done" and set the project goals.

At one of our projects at LBUSD, phase 1 project had a schedule duration of 7 months. Due to bids coming in high, the district requested that the project get re-bid, unfortunately there were no changes to the bids. The district decided to move forward with phase 1 work consisted of HVAC System Installation, Utility Upgrades, ADA – Accessibility Upgrades, Fire Alarm Upgrades, Intercom, Clocks, Speakers Ceiling/Wall Mounted Projectors/AV System, Ceiling Repair, Interior Lights, Interior and Exterior Painting, New windows, other State Funded Repairs and installation of a new Transformer to allow Phase 2, 3 & 4 to continue.

This was a huge undertaking , due to only having 4 months to get the project. Project challenges with design issues that caused numerous CCD A's and working with SCE to guarantee new power distribution to the site. The leadership of RCM and our partnering philosophy, the project got completed on time and avoided major delays and additional cost to the district.

"One Example of RCM Partnering Philosophy"..

From: Purcell, Josh <JPurcell@Balfourbeattyus.com>
Sent: Thursday, January 9, 2020 9:18 AM
To: ALAN REISING; David Miranda
Subject: John Muir

Good morning Alan and David,

1st I want to say thank you to both of you guys for your support and help with the John Muir Project. Your team was willing and ready to help out with this tough and shortened phase but we all came together for a common goal and that was to complete this 1st phase safely and on-time.

2nd is I also would like to say that Jerry (CM) was extremely vital to getting this done in a timely fashion as well. I have worked with many CM's before but none of them have gone above and beyond for the site like Jerry and his team did out here. There is no way that Balfour Beatty could have done this without BCM. I have personally thanked him and his team for all their efforts to push the AOR and IOR but I wanted to make sure that both of you guys also knew how important BCM was to our success.

If either of you hear anything that needs to be addressed at John Muir please feel free to contact me directly so I can get it done quickly.

I look forward to this next phase of this project and look forward to continue our relationship. Thanks.

Josh Purcell, CMIT
 Superintendent | Balfour Beatty
 O: 949.502.4000 | C: 415.418.9330
 E: jpurcell@balfourbeattyus.com | www.balfourbeattyus.com
 1501 Quail Street, Suite 130, Newport Beach, CA 92660

Balfour Beatty

Confidentiality Notice: The contents of this e-mail are confidential and are intended only for the use of the recipient(s) unless otherwise indicated. If you have received this e-mail in error, please notify the sender(s) immediately by telephone. Please destroy and delete the message from your computer. Any form of reproduction, dissemination, copying, disclosure, modification, distribution and/or publication of this e-mail is strictly prohibited unless expressly authorized by the sender(s). No person, without written confirmation of the contents of this e-mail, should rely on it. While this e-mail and the information it contains are supplied in good faith, no member of the Balfour Beatty plc group of companies shall be under any liability in respect of the contents of this e-mail or for any reliance the recipient may place on it. This e-mail is sent for information purposes only and shall not have the effect of creating a contract between the parties.

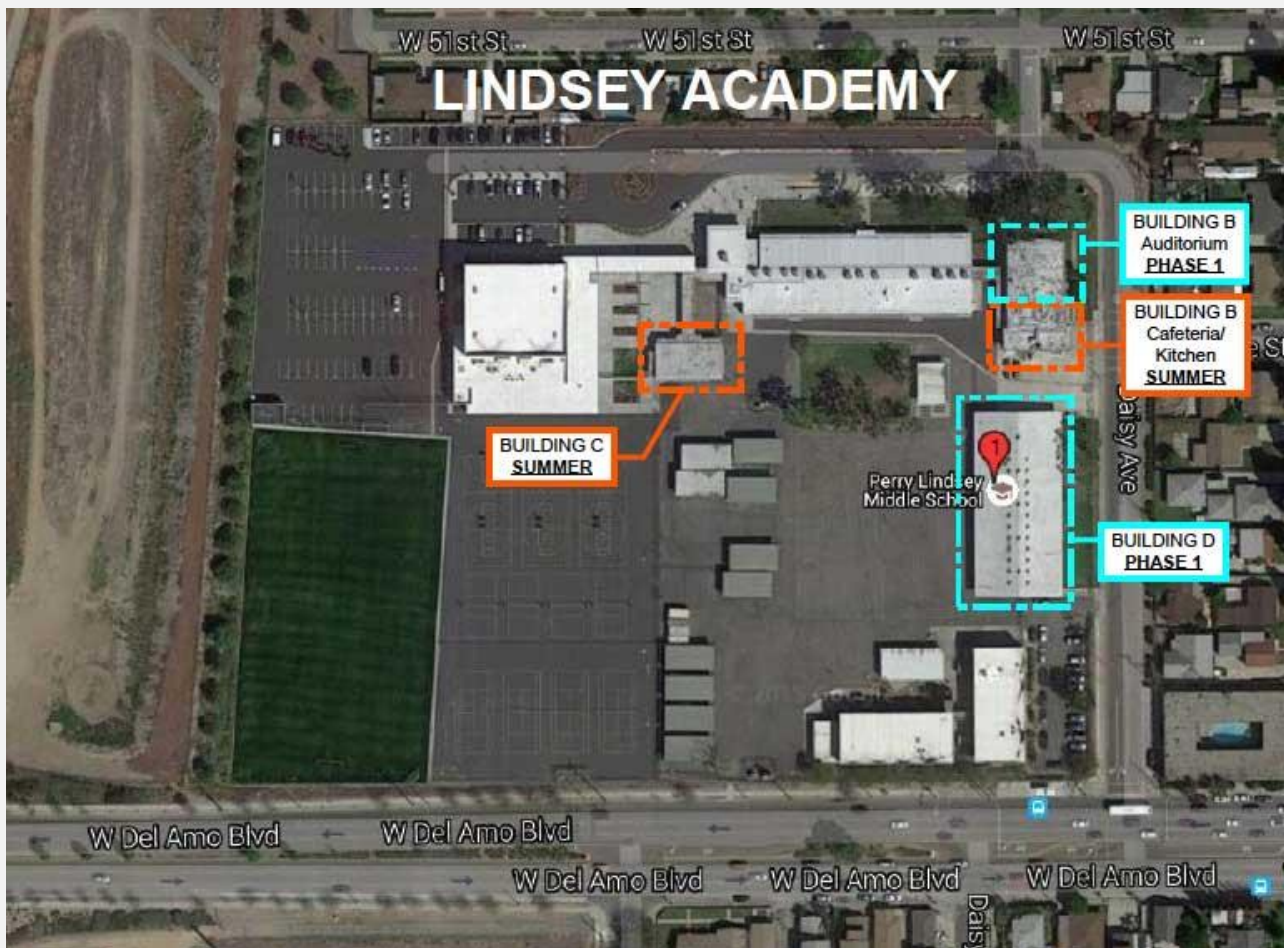
Our inhouse scheduling Mr. Escano 35+ years of experience providing scheduling services for construction projects will be reviewing monthly schedules issues by the contractor through out the project. We are currently use P6 scheduling software. But can adapt to any scheduling software that the District request.

Sub Consultants

Newport Mesa Unified School District

- * RCM Group will not utilize sub-consultants to provide services described herein to the district.

LBUSD Lindsey Academy HVAC – Phasing Plan Completed December 2018



References

Newport Mesa Unified School District



FILLMORE
UNIFIED SCHOOL DISTRICT

627 SESPE AVENUE, FILLMORE, CALIFORNIA 93015
T 805.524.6038 • F 805.524.6660 • FILLMOREUSD.ORG

November 2, 2020

To Whom It May Concern:

The purpose of this letter is to share our district's experience with the professional firm of Roberts Construction Management (RCM).

Our district has directly benefited from our partnership with RCM, who is currently providing construction management services as a joint venture with Pacifica Services on the construction of a \$16M Career Technical Education facility at our high school. The project is slated to be completed by July 2021, thanks in large part to the professional services and support of RCM. I can attest to the high level of professionalism, knowledge, and skill exhibited by Jerry Roberts and the team as our construction management firm. RCM places a great deal of emphasis in their work to keep us informed, protect staff and students, and ensure that the project continues to be on schedule and on budget.

RCM fully understands how to support the needs of our facilities, students, community, and district and brings a team approach to their work. The team possesses direct experience in working with the Division of State Architect, which has made a profound positive impact for our project. Additionally, our staff has truly appreciated the ease in working with RCM and their work to provide honest and trustworthy assessments of the project. I am confident that RCM would provide the same high level of service to any district that chooses them to provide construction management services.

RCM has my highest recommendation and will work tirelessly to support your organization. Do not hesitate to contact me if you require any additional information.

Respectfully,

A handwritten signature in blue ink, appearing to read "Adrian E. Palazuelos".

Adrian E. Palazuelos, Ph.D.
Superintendent

AP

References

Newport Mesa Unified School District



Office of the Business Services Administrator
2425 Webster Ave., Long Beach, CA 90810
(562) 597-7570

June 5, 2020

Subject: Reference for RCM Group

To Whom It May Concern:

I am pleased to write this letter of recommendation for Jerry Roberts and the RCM Group CM team. RCM is one of our CM teams managing multiple construction projects since 2017 for our \$3 billion building program and capital improvement projects for the Long Beach Unified School District. The team continually impressed me with their work ethic, leadership, DSA experience and opportunities to improve efficiency and cost-effectiveness as it related to the construction project.

Some of our most challenging projects, the RCM team were able to successfully complete several new construction and modernization projects on time and under budget, due in part to the experience and leadership abilities of the CM team and Mr. Roberts. The team worked countless hours to ensure that our projects and operations continued to move forward at top speed and always kept the best interest of the district, students, and community in mind.

It is without reservation and with great pleasure that I recommend RCM Group to any school district for future Construction Management services. Their commitment to excellence is demonstrated with every task and I have no doubt that this firm can lead and excel in any capacity.

Sincerely,

A handwritten signature in black ink, appearing to read 'Alan Relsing'.

Alan Relsing – Business Services Administrator
Long Beach Unified School District
2425 Webster Ave.
Long Beach, CA 90810
562-597-7570

References

Newport Mesa Unified School District



GLENDALE UNIFIED SCHOOL DISTRICT
"Preparing our students for their future"
Planning, Development & Facilities
349 W. Magnolia Ave., Glendale, CA 91204
Tel: 818/507-0201 - Fax: 818/507-4911

November 7, 2017

RE: Letter of Recommendation

Dear Sir or Madam:

It is my pleasure to write a letter of recommendation for Mr. Jerry Roberts. RCM Group has provided construction management services for us on multiple projects over the last three years. I have had the pleasure of working with Mr. Roberts and his team in the capacity of construction manager while working as the Executive Director of Planning, Development, and Facilities at Glendale Unified School District. RCM was instrumental in assisting in managing our construction bond program of \$270 Million. Team assisted in the planning, bidding, and construction of several Over Crowding Relief Grant projects including closeout. It is refreshing to have a firm that is a team player who possesses quality communication skills and follow-thru in responding to district needs or concerns.

RCM Group understand the balance between the District's needs and construction difficulties and they continue to exhibit a commonsense and rationality to ensure the projects are completed successfully. I have found Mr. Roberts to be friendly, knowledgeable and proactive in working as a team to help a project succeed. His assistance in change order negotiation helped the district save thousands of dollars. I highly recommend RCM group to any school districts for Construction Management Services and to help in any capacity as possible.

Respectfully,

A handwritten signature in black ink, appearing to read "Tony Barrios".

Tony Barrios
Executive Director
Planning, Development, and Facilities
Glendale Unified School District

References

Newport Mesa Unified School District



October 20, 2017

To whom it may concern,

It is my pleasure to write this letter of recommendation and support for Jerry Roberts (RCM Group). It has been my great pleasure to know Jerry over the past two years working closely with Occidental College. He is an extremely personable and knowledgeable person. In my experience Jerry is dependable, discrete, likeable, loyal, honest, enthusiastic and realistic in his expectations and is truly an owner's advocate.

I have worked with many project managers over the past several years and Jerry stands head and shoulders over them, not only in demonstrated initiative, intelligence and creativity, but also in his ability to function as a productive member of a team. His intellect is matched by his ability to communicate clearly, and to project an open friendly persona to others regardless of their level of expertise.

Jerry's excellent communication skills, positive outlook and pleasing personality enhance his natural leadership skills, Jerry's willingness to accept challenges and listen to input enable him to contribute thoughtful, well-reasoned approaches to helping others solve difficult problems.

I have observed Jerry's involvement in a variety of projects here at the college and has demonstrate his continuing deep commitment to the delivering of successful projects on time and within budget. For example, he managed a complicated \$18M HVAC/Norris CM Multiple Prime Project with time constraints, often working long hours, coordinating multiple trades, working with facilities and college staff and allowing the semester to begin with no glitches.

I recommend RCM Group as a construction management firm for any planning, design and construction management for any education facilities and have no doubt this firm will prove to be a valuable asset to you and your organization.

Please do not hesitate to call with any questions.

Greg Oshea

Senior Project Manager
Occidental College

Facilities Management

1600 Campus Road M-6, Los Angeles, CA 90041-3314 1 323-259-2651 1 oxy.edu/facilities-management

References

Newport Mesa Unified School District



Office of Mary C. Barlow ...advocates for children

November 16, 2020

RCM Group, LLC
5725 Whittier Blvd
Los Angeles, Ca 90022
Attn: Jerry Roberts

Subject: **REQUEST FOR QUALIFICATIONS FOR CONSTRUCTION
MANAGEMENT SERVICES**

The Kern County Superintendent of Schools would like to express its appreciation for your participation in the qualifications based selection process to provide construction management services for future projects. All proposals have been received and compared based upon the following information:

- Professional experience of firms in relations to the work to be performed
- Proposed team members, experience, and availability
- Previous references relative to projects of similar size and function

We are pleased to inform you that your firm has been chosen as one of the agencies who may be used for an upcoming Kern County Superintendent of Schools project. We will contact you for proposals as future projects develop. This prequalification does not necessarily guarantee a contract for construction management services.

Thank you for your participation.

Sincerely,

Dr. Mary C. Barlow
Kern County Superintendent of Schools

A handwritten signature in blue ink, appearing to read "SG", is placed over the typed name of the signatory.

Sherrie Gruber, Director of Facilities
Facilities and Property Management Services

SG/bc

1300 17th Street - CITY CENTRE | Bakersfield, CA 93301-4533
[661] 636-4000 | FAX [661] 636-4130 | TDD [661] 636-4800 | www.kern.org

References

Newport Mesa Unified School District

SOUTH WHITTIER SCHOOL DISTRICT

November 17, 2020

INFO/ACTION

APPROVE THE AWARD OF CONTRACTS FOR PROJECT MANAGEMENT SERVICES UNDER GOVERNMENT CODE SECTION 4525

Background:

Government Code §§4525 et seq. permits a school district to select certain professional services, including project management services, on the basis of demonstrated competence and the professional qualifications necessary for the satisfactory performance of the services required.

Analysis:

District staff issued a request for proposals ("RFP") to an adequate number of qualified sources, generating the maximum number of proposals from qualified sources and encouraging reasonable competition consistent with the nature and requirement of the procurement. The District received 15 proposals and evaluated those proposals against a number of criteria specified in the RFP. Staff has identified a number of qualified professionals that scored highly after being evaluated on those criteria, including Expertise, Qualifications, Management Plans, Past Performance, Responsiveness, and Quality of the Proposal. Staff believes these chosen professionals have demonstrated their competence and qualifications to provide these necessary project management services to the District on a number of future projects and believes it is in the District's best interest to award contracts to these professionals.

Recommendation:

It is recommended that the Board authorize the award of project management contracts to **DIXON SmartSchoolHouse LLC**, **Fonder-Salari INC**, **Knowland Construction Services Inc.**, and **RCM Group, LLC**, and authorize the Superintendent or designee to negotiate and execute such contracts, with assistance of legal counsel where necessary, and take any other actions necessary to effectuate the intent of those agreements.

Funding:

Bond funds, but may vary by project.

Prepared by:

Mark Keriakous, Chief Business Officer

Superintendent's Comment:

The Superintendent supports the above recommendation.

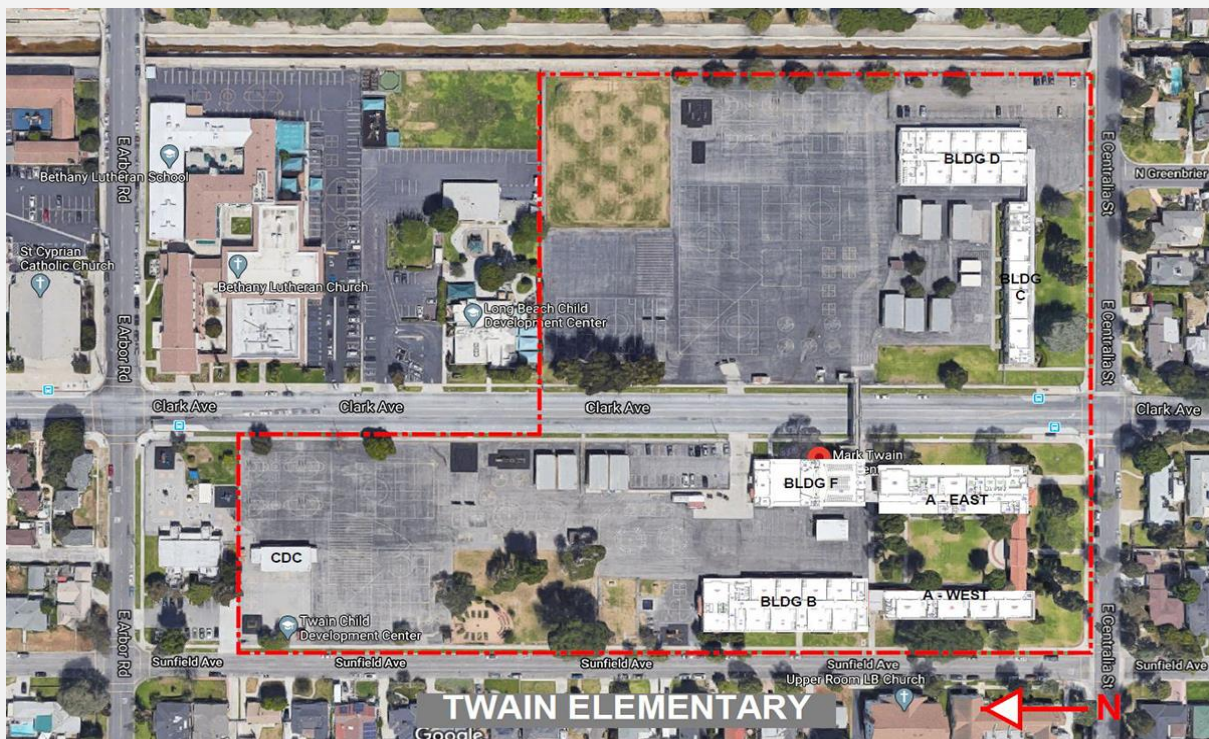
Gary Gonzales, District Superintendent

Legal Issues

Newport Mesa Unified School District

- RCM Group states that there has never been 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.
- RCM Group states that there never been any settlements or judgments involving such actions within the last five (5) years.
- RCM Group states that there has never been 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.

LBUSD Twain ES HVAC Modernization Project Phasing Plan - Summer 2021 Construction



Other Forms

Newport Mesa Unified School District

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: RCM GROUP, LLC

I. 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	5725 Whittier Blvd Los Angeles, CA 90022	5
2. Past Performance	Write in:	Max. Pts.
a. Identify the Firm's number of years' experience in providing services for K-12	5	5
b. Project listing - Identify the number of K-12 projects the Firm has worked on within last 3 years	14 Construction Projects – HVAC Modernization and New Construction Projects 23 Projects – Planning & Design Management	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	12	5
3. Claims, Lawsuits, Arbitrations	Write in: None	Max. Pts.
a. Identify the number allegations against the firm or any employee for any violations of law	0 – Clean Record	5
b. Identify the number of settlements or judgments involving such actions within the last five (5) years	0 – Clean Record	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.

Jerry Roberts



2-22-21

Printed Name

Signature

Date

Other Forms

Newport Mesa Unified School District

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

President

Title

5725 Whittier Blvd. Los Angeles CA 90022

Address

213-298-1621

Telephone

2-22-21

Date

Jerry Roberts

Typed or Printed Name

RCM GROUP

Company

5725 Whittier Blvd. Los Angeles CA 90022

Address

323-728-2765

Fax

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

Other Forms

Newport Mesa Unified School District

ATTACHMENT C

STATEMENT OF EXPERIENCE AND FINANCIAL CONDITION

Company Name: RCM GROUP, LLC

(Check One): Corporation Partnership X Sole Proprietorship

Address: 5725 Whittier Blvd, Los Angeles Ca 90022

Telephone/FAX#: 323-767-5302 / 323-728-2765 (Fax)

Date and State of Formation/Incorporation: 5-2-2017 / California

Is the company authorized to do business in California? Yes

Basis of Authorization: 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>\$431,965</u>	<u>\$875,287</u>	<u>\$1,002,281</u>
Total:	<u>\$431,965</u>	<u>\$875,287</u>	<u>\$1,002,281</u>

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

\$18 Million

Other Forms

Newport Mesa Unified School District

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 **X**No If yes, explain on a separate, signed sheet.
2. Does the company have an ongoing relationship or affiliation with an equipment manufacturer? ___Yes **X**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 **X**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 **X**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 **X**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 **X**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 **X**No If yes, explain on a separate, signed sheet. State the project name, location, owner/contact person, telephone number, amount of dispute, and brief description of the situation.

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

SIGNATURE:

NAME:

TITLE:



Jerry Roberts

President

Other Forms

Newport Mesa Unified School District

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 note, see attachments.

Section 3
Experience

Other Forms

Newport Mesa Unified School District

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

Jerry Roberts

Title

President

Date

February 22, 2021

Other Forms

Newport Mesa Unified School District

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: Jerry Roberts

Duly Authorized Signature: 

Title: President

Date of this Proposal/Offer: February 22, 2021

Offeror Name: RCM GROUP, LLC

Offeror Address: 5725 Whittier Blvd, Los Angeles, Ca 90022

Offeror Telephone: 213.298.1621

Offeror Email: jroberts@rcmgroup-team.com

Other Forms

Newport Mesa Unified School District

ATTACHMENT H

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

Construction Management Services RFQ: # 11921

NONCOLLUSION DECLARATION Public Contract Code § 7106

TO BE EXECUTED BY SUBMITTER AND SUBMITTED WITH RFQ

The undersigned declares:

I am the President of RCM GROUP, LLC

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: RCM GROUP, LLC

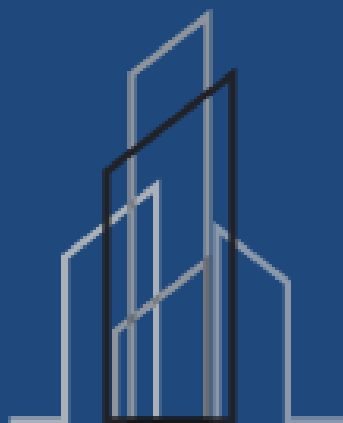
City, State: Los Angeles, Ca

Signature:



Print Name: Jerry Roberts

Title: President



RCM
GROUP

Contact Us:

5725 Whittier Blvd, Los Angeles, CA 90022
(323) 767-5302 Fax (323) 728-2765