



CITIZENS' OVERSIGHT COMMITTEE MEETING

NOTICE AND AGENDA

MARCH 22, 2023

6:30 PM – 8:00 PM

HYBRID

IN PERSON: 351 S. HUDSON AVENUE, ROOM 236, PASADENA, CA 91106

OR

VIRTUALLY: [Join Webex meeting](#)

ID: 26209509424 Password: baMMfEMK547

OR

BY PHONE: (US) +1 415-655-0001 (toll)

Access code: 2620 950 9424

OR

26209509424@pusd.webex.com

- I. Call to Order**
- II. Public Comment**
- III. Approval of the February 2023 Meeting Minutes**
- IV. Board of Education COC Liaison Report**
- V. Review of Measure TT and Measure O related Board Reports**
 - BR 1619-F – Approval to proceed with the award bid of Contractor for the Marshall Fundamental Secondary School Band Room Emergency Roof Repairs Project.
 - BR 1620-F – Approval to proceed with Award of Contractor for the HVAC Replacement Project.
- VI. Facilities Committee Meeting Update**
- VII. Facilities Reports**
 - **Dr. Leslie Barnes, Chief Finance and Operations Officer**
 - School Specific Master Plan Update
 - **Consolidated Budget Status by Funds**
 - MTT Financial (Account-Ability) Projects

- Measure O Projects
 1. Facilities Projects
 2. ITS Projects
- **Construction Status Reports**
 1. MTT Projects
 2. Measure O (Facilities) Projects
 3. Measure O (ITS) Projects

VIII. Next meeting date: April 26, 2023



**PASADENA UNIFIED SCHOOL DISTRICT (PUSD)
CITIZENS' OVERSIGHT COMMITTEE (COC) MEETING
DRAFT Meeting Minutes for February 22, 2023**

Meeting was held online via WebEx only

- I. Meeting was called to order at 6:32 pm
Present:
 - A. COC members: Stephen Aquino, John Robinson, Paul Nerenberg, Angela Uriu
 - B. PUSD staff: Leonard Hernandez, Anahit Azarian, Balvina Sheffield
 - C. PUSD Board liaison: Jennifer Hall Lee (PUSD Board Trustee)
 - D. Public: Kim Kenne (PUSD Board Trustee), Rene Gonzalez, Judy McKinley, Ruthann Aull, Sandy Lee
 - E. There were also some unidentified call-in users.
- II. Public Comment
 - A. Sandy Lee: Works with 301 Organics (responsible for recycling for Rose Bowl, partner agreement with PUSD) and wanted to make herself available for questions to the COC.
 - B. Rene Gonzalez: Facilities Master Plan website is not fully translated into Spanish. This was clarified by COC members to state that the website's dashboards and "external" content were not being translated into any of the other languages.
- III. Approval of the January 2023 Meeting Minutes – The minutes were approved.
- IV. Board of Education COC Liaison Report – No report was given.
- V. Review of Measure TT and Measure O related Board Reports – No Board Reports were presented at this meeting.
- VI. Facilities Committee Meeting Report
 - A. Board Trustee Kenne: We looked at non-Measure O-related items, including solar panels at Altadena Elementary and EV bus management. We received project status reports for projects funded by developer fees and ESSER.
 - B. COC member Robinson: Feb. 9 agenda of Facilities Committee lists all future meeting dates. (Next four meeting dates are: March 14, April 11, May 9, and June 13.)

VII. Facilities Reports

A. School-Specific Facilities Master Plan update

Held workshops with DLR on capacity prioritization. Next up will be a review of the latest demographic study.

B. Marshall Band Room construction timeline

Facilities received questions and concerns about the timeline, so we wanted to present some details (see meeting materials).

Question from COC member Hammack: Will the room be able to be occupied by Aug. 7? Could teachers come in and prepare beforehand?

Staff response: We will definitely work with the school to expedite occupancy.

Question from COC member Aquino: What do you mean by "return it better than it was?"

Staff response: The room will receive new paint, new dropped ceiling, and possibly new flooring.

Question from COC member Robinson: Bids were received on Feb. 16. Did you receive a good number of bids?

Staff response: Yes, and I believe we have awarded a contractor already.

C. Measure TT report

Question from COC member Robinson: The Measure O report took in the lock sets, but \$1M is missing from the Measure TT report (i.e., hasn't been earmarked). Staff response: We will work on that and do another revision of the Measure TT report.

D. Measure O financial report

1. Ed tech list – There were no changes.

2. Capital projects list

Comment from COC member Robinson: Roofing and HVAC projects, shade structures, and lock set budgets (schools and charter schools) were added. Wilson got defunded from \$34M to \$2M (still in planning phase); this money was put back in the uncommitted column. Invoice to date went up ~\$3M from last meeting (mostly for roofing).

Comment from Board Trustee Kenne: There was nothing brought to the Board about the change of funding to Wilson. Shouldn't this be done?

Staff response: It was returned to the uncommitted budget because we know won't spend that much there. We know there will be descoping of the projects.

Follow-up from Board Trustee Kenne: If there is a change of scope, then there should be a Board conversation about it [because this project already has an approved Board Report].

E. Measure TT project status report – No comments/questions.

F. Measure O project status report

1. Ed tech list – No immediate comments/questions.

Follow-up comment from Ruthann Aull; There was a cart of 30 Apple laptops donated to Roosevelt Elementary. Where did that cart move to after Roosevelt closed?

Staff response: We will check with TJ (who is no longer with PUSD) about what happened.

2. Capital projects list

Comment from COC member Robinson: For future reports, please ensure that all percent complete fields are filled.

Question from Board Trustee Kenne: What is Turnkey Design and Construction with Schneider Electric?

Staff response: This our district-wide water conservation initiative.

There were some associated discussions regarding the needs of unhoused/homeless students, as well as the formats of various committee meetings and how to maximize community participation.

VIII. Next meeting: March 22, 2023

Meeting adjourned: 7:25 pm

**BOARD OF EDUCATION
PASADENA UNIFIED SCHOOL DISTRICT
PASADENA, CALIFORNIA**

Topic: APPROVAL TO PROCEED WITH AWARD BID OF CONTRACTOR FOR THE MARSHALL FUNDAMENTAL SECONDARY SCHOOL BAND ROOM EMERGENCY ROOF REPAIRS PROJECT

RECOMMENDATION: The Governing Board of the Pasadena Unified School District approves staff to proceed with the Award of a Contract for the Marshall Fundamental Secondary School Band Room Emergency Roof Repairs Project to Shenk Developers.

Anticipated Effects on Student Outcomes: Implementation of Measure O Bond Capital Projects to ensure a modern, safe, and orderly environment that supports and inspires student learning.

I. BACKGROUND:

In April of 2022, maintenance department personnel discovered an extensive sagging of the band room ceiling at Marshall Fundamental Secondary School. In order to assess the necessary repairs, the ceiling needed to be removed. Unfortunately, this required asbestos removal be done first, which is a lengthy process. The ceiling demolition and disposal were completed on September 12, 2022, and at this time it was discovered that eleven (11) roof rafters had failed (cracked/split). This constituted an immediate structural safety issue which required design and engineering and also DSA approval prior to bidding of the project and the ultimate repairs.

The project was posted to PlanetBids as The Marshall Fundamental Secondary School Band Room Emergency Roof Repairs Project, RFP 04-22/23 on 01/01/2023 and the bid deadline was 02/16/2023.

II. STAFF ANALYSIS:

Upon review of the responsive bidders, it is recommended that the Board award the contract to Shenk Developers.

Attachment: Shenk Developers Bid Package and RFP scoring sheet.

III. FISCAL IMPACT:

Funds required in the amount of \$188,000.00 are available from Measure TT funds. This amount includes an allowance for a district controlled contingency of \$25,000.00.

**Pasadena Unified School District
Board of Education Agenda**
March 23, 2023
Submitted by: _____
Leslie Barnes, Ed.D., Chief Finance and Operations Officer

Funding title/code:

Title: Measure TT Funds

Codes: 21.1-97107.0-00000-85000-6275-0950000 \$163,000 (Construction)
21.1-97107.0-00000-85000-6275-0950000 \$25,000 (Contingency)

Approved:

Brian O. McDonald, Ed.D. Superintendent

Originated by: Leonard Hernandez, Jr., Director of Facilities, Maintenance, Operations and Transportation

DESIGNATION OF SUBCONTRACTORS FORM

Description & Portion of Work	Name of Subcontractor	Location & Place of Business	License Type and Number	E-Mail & Telephone*	DIR Registration Number*
ACOUSTICAL CEILINGS AND BUILDING INSULATION	EXCEL ACOUSTICS INC.	1827 CAPITAL ST. SUITE 102	C-61/D50 C-2	PETE.DOLLER@EXCELACOUSTICS.COM	1000056118
	"	CORONA, CA 92879	#724511	951-371-5500	
ELECTRICAL	VENTURE SYSTEM GROUP, INC.	14812 CAPELLA ST LA MIRADA, CA 90638	C-10 1015732	CHUCK@VENTURESYSTEMSINC.COM 562-447-7888	1000039977
FIRE SUPPRESSION SPRINKLER SYSTEM	BOB'S FIRE PROTECTION SERVICES	10136 LANGMUIR AVE. SUNLAND, CA 91040	C-16 512804	ROBFIREPRO@YAHOO.COM 818-388-7737	1000021697
ROOFING	LETNER ROOFING CO	1450 N GLASSELL ST ORANGE, CA 92667	C-39 689961	JSCOTT@LETNER.COM 714-493-8480	1000002763

Description & Portion of Work	Name of Subcontractor	Location & Place of Business	License Type and Number	E-Mail & Telephone*	DIR Registration Number*

* This information must be provided at the time of submission of bid or must be provided within 24 hours after the time set for the opening of bids. Bidders who choose to provide this information within 24 hours after the time set for the opening of bids are solely responsible to ensure the District receives this information in a timely manner. The District is not responsible for any problems or delays associated with emails, faxes, delivery, etc. Absent a verified fax or email receipt date and time by the District, the District's determination of whether the information was received timely shall govern and be determinative. Bidder shall not revise or amend any other information in this form submitted at the time of bid. The information submitted at the time of bid shall govern over any conflicts, discrepancies, ambiguities or other differences in any subsequent Subcontractor Designation Forms submitted by the bidder.

Proper Name of Bidder: SHENK DEVELOPERS

Date: 2.15.23

Name: HRATCH VORPERIAN

Signature of Bidder Representative: H. Vorperian

Address: 710 N PRISCILLA LN, BURBANK, CA 91505

Phone: 818.281.9541

BID FORM

FOR

Marshall Band Room Ceiling and Roof Repair

990 N. Allen Ave. Pasadena, CA 91104

RFP No.: 04-22/23

FOR

PASADENA UNIFIED SCHOOL DISTRICT

CONTRACTOR
NAME:

SHEK DEVELOPERS

ADDRESS:

710 N PRISCILLA LN

BURBANK, CA 91505

TELEPHONE:

(818) 281.9541

FAX:

(818) 841.9044

EMAIL

SHEKDEVELOPERS@HOTMAIL.COM

TO: Pasadena Unified School District, acting by and through its Governing Board, herein called "District".

1. Pursuant to and in compliance with your Notice Inviting Bids and other documents relating thereto, the undersigned bidder, having familiarized himself with the terms of the Contract, the local conditions affecting the performance of the Contract, the cost of the work at the place where the work is to be done, with the Drawings and Specifications, and other Contract Documents, hereby proposes and agrees to perform within the time stipulated, the Contract, including all of its component parts, and everything required to be performed, including its acceptance by the District, and to provide and furnish any and all labor, materials, tools, expendable equipment, and utility and transportation services necessary to perform the Contract and complete all of the Work in a workmanlike manner required in connection with the construction of:

BID NO.: 04-22/23

Marshall Band Room Ceiling and Roof Repair

in the District described above, all in strict conformance with the drawings and other Contract Documents on file at PlanetBids of said District for amounts set forth herein.

2. BIDDER ACKNOWLEDGES THE FOLLOWING ADDENDUM:

Number	Number	Number	Number	Number	Number	Number	Number
<u>1</u>	_____	_____	_____	_____	_____	_____	_____

Acknowledge the inclusion of all addenda issued prior to bid in the blanks provided above. Your failure to do so may render your bid non-responsive.

3. TOTAL CASH PURCHASE PRICE IN WORDS & NUMBERS:

A. Marshall Band Room Ceiling and Roof Repair (Base)

ONE HUNDRED SIXTY THREE THOUSAND DOLLARS
(\$ 163,000)

B. Allowance

Twenty Five Thousand DOLLARS
(\$ 25,000)

C. Total Project (Base and Allowance)

ONE HUNDRED EIGHTY EIGHT THOUSAND DOLLARS
(\$ 188,000)

4. Allowances: Allowances as set forth below are to be used as compensation for items as set forth by the District. The amounts listed are to be included in the base bid above and shall be listed separately.

Allowance No. 1: Twenty five thousand Dollars (\$25,000)

5. TIME FOR COMPLETION: The District may give a notice to proceed within ninety (90) days of the award of the bid by the District. Once the Contractor has received the notice to proceed, the Contractor shall complete the work in the time specified in the Agreement. By submitting this bid, Contractor has thoroughly studied this Project and agrees that the Contract Time for this Project is adequate for the timely and proper completion of the Project. Further, Contractor has included in the analysis of the time required for this Project, Rain Days, Governmental Delays, and the requisite time to complete Punch List.

In the event that the District desires to postpone giving the notice to proceed beyond this ninety (90) day period, it is expressly understood that with reasonable notice to the Contractor, giving the notice to proceed may be postponed by the District. It is further expressly understood by the Contractor, that the Contractor shall not be entitled to any claim of additional compensation as a result of the postponement of giving the notice to proceed.

If the Contractor believes that a postponement will cause a hardship to it, the Contractor may terminate the contract with written notice to the District within ten (10) days after receipt by the Contractor of the District's notice of postponement. Should the Contractor terminate the Contract as a result of a notice of postponement, the District shall have the authority to award the Contract to the next lowest responsible bidder, if applicable.

It is understood that the District reserves the right to reject any or all bids and/or waive any irregularities or informalities in this bid or in the bid process. The Contractor understands that it may not withdraw this bid for a period of ninety (90) days after the date set for the opening of bids.

6. Attached is bid security in the amount of not less than ten percent (10%) of the bid:

Bid bond (10% of the Bid), certified check, or cashier's check (circle one)

7. The required List of Designated Subcontractors is attached hereto.

8. The required Non-Collusion Declaration is attached hereto.

9. The Substitution Request Form, if applicable, is attached hereto.

10. It is understood and agreed that if written notice of the acceptance of this bid is mailed, telegraphed, or delivered to the undersigned after the opening of the bid, and within the time this bid is required to remain open, or at any time thereafter before this bid is withdrawn, the undersigned will execute and deliver to the District a Contract in the form attached hereto in accordance with the bid as accepted, and that he or she will also furnish and deliver to the District the Performance Bond and Payment Bond, all within five (5) calendar days after award of Contract, and that the work under the Contract shall be commenced by the undersigned bidder, if awarded the Contract, by the start date provided in the District's Notice to Proceed, and shall be completed by the Contractor in the time specified in the Contract Documents.

11. The names of all persons interested in the foregoing proposal as principals are as follows:

HRATCH VORPERIAN

VAHAK MAGHARIAN

(IMPORTANT NOTICE: If bidder or other interested person is a corporation, state the legal name of such corporation, as well as the names of the president, secretary, treasurer, and manager thereof; if a co-partnership, state the true names of the firm, as well as the names of all individual co-partners comprising the firm; if bidder or other interested person is an individual, state the first and last names in full.)

12. PROTEST PROCEDURES. If there is a bid protest, the grounds shall be submitted as set forth in the Instructions to Bidders.

13. The undersigned bidder shall be licensed and shall provide the following California Contractor's license information:

License Number: 488298
License Expiration Date: 03/31/2024
Name on License: SHEK REAL ESTATE DEVELOPMENT, INC
Class of License: DBA SHEK DEVELOPERS
DIR Registration Number: A, B 1000005748

If the bidder is a joint venture, each member of the joint venture must include the above information.

14. Time is of the essence regarding this Contract, therefore, in the event the bidder to whom the Contract is awarded fails or refuses to post the required bonds and return executed copies of the Agreement form within five (5) calendar days from the date of receiving the Notice of Award, the District may declare the bidder's bid deposit or bond forfeited as damages.

15. The bidder declares that he/she has carefully examined the location of the proposed Project, that he/she has examined the Contract Documents, including the Plans, General Conditions, Supplemental Conditions, Addenda, and Specifications, all others documents and requirements that are attached to and/or contained in the Project Manual, all other documents issued to bidders and read the accompanying instructions to bidders, and hereby proposes and agrees, if this proposal is accepted, to furnish all materials and do all work required to complete the said work in accordance with the Contract Documents, in the time and manner therein prescribed for the unit cost and lump sum amounts set forth in this Bid Form.

16. DEBARMENT. In addition to seeking remedies for False Claims under Government Code section 12650 et seq. and Penal Code section 72, the District may debar a Contractor pursuant to Article 15 of the General Conditions if the Board, or the Board may designate a hearing officer who, in his or her discretion, finds the Contractor has done any of the following:

- a. Intentionally or with reckless disregard, violated any term of a contract with the District;

b. Committed an act or omission which reflects on the Contractor's quality, fitness or capacity to perform work for the District;

c. Committed an act or offense which indicates a lack of business integrity or business honesty; or

d. Made or submitted a false claim against the District or any other public entity. (See Government Code section 12650, et seq., and Penal Code section 72)

17. DESIGNATION OF SUBCONTRACTORS. In compliance with the Subletting and Subcontracting Fair Practices Act (California Public Contract Code section 4100 et seq.) and any amendments thereof, each bidder shall list subcontractors on the District's form Subcontractor list. This subcontractor list shall be submitted with the bid and is a required form

I agree to receive service of notices at the e-mail address listed below.

I the below-indicated bidder, declare under penalty of perjury that the information provided and representations made in this bid are true and correct.

SHEK REAL ESTATE DEVELOPMENT, INC. DBA SHEK DEVELOPERS
Proper Name of Company

HRATCH VORPERIAN
Name of Bidder Representative

710 N PRISCILLA LN
Street Address

BURBANK, CA 91505
City, State, and Zip

(818) 281.9541
Phone Number

(818) 841.9044
Fax Number

SHEKDEVELOPERS@HOTMAIL.COM
E-Mail

By: A. Vorperian
Signature of Bidder Representative

Date: 2.15.23

NOTE: If bidder is a corporation, the legal name of the corporation shall be set forth above together with the signature of authorized officers or agents and the document shall bear the corporate seal; if bidder is a

partnership, the true name of the firm shall be set forth above, together with the signature of the partner or partners authorized to sign contracts on behalf of the partnership; and if bidder is an individual, his signature shall be placed above.

All signatures must be made in permanent blue ink.

CONTRACTOR'S CERTIFICATE REGARDING WORKERS' COMPENSATION
FORM

Labor Code section 3700 in relevant part provides:

Every employer except the State shall secure the payment of compensation in one or more of the following ways:

1. By being insured against liability to pay compensation by one or more insurers duly authorized to write compensation insurance in this State.
2. By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to employees.
3. For any county, city, city and county, municipal corporation, public district, public agency, or any political subdivision of the state, including each member of a pooling arrangement under a joint exercise of powers agreement (but not the state itself), by securing from the Director of Industrial Relations a certificate of consent to self-insure against workers' compensation claims, which certificate may be given upon furnishing proof satisfactory to the director of ability to administer workers' compensation claims properly, and to pay workers' compensation claims that may become due to its employees. On or before March 31, 1979, a political subdivision of the state which, on December 31, 1978, was uninsured for its liability to pay compensation, shall file a properly completed and executed application for a certificate of consent to self-insure against workers' compensation claims. The certificate shall be issued and be subject to the provisions of Section 3702.

I am aware of the provisions of Labor Code section 3700 which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provision before commencing the performance of the work of this Contract.



(Signature)



(Print)



(Date)

In accordance with Article 5 (commencing at section 1860), Chapter 1, Part 7, Division 2 of the Labor Code, the above certificate must be signed and submitted with the Contractor's bid.

NON-COLLUSION DECLARATION

The undersigned declares:

I am the PRESIDENT [Title] of SHENK DEVELOPERS [Name of Company], the party making the foregoing bid.

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

Any person executing this declaration on behalf of a bidder 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 bidder.

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 2.15.23 [Date], at BORBANIC [City], CA [State].

Signed: 

Typed Name: IRATKA VORPERIAN

BID GUARANTEE FORM

(Use only when not using a Bid Bond)

Accompanying this proposal is a cashier's check payable to the order of the Pasadena Unified School District or a certified check payable to the order of the Pasadena Unified School District in an amount equal to ten percent (10%) of the base bid and alternates (\$_____).

The proceeds of this check shall become the property of said District, if, this proposal shall be accepted by the District through the District's Governing Board, and the undersigned fails to execute a Contract with and furnish the sureties required by the District within the required time; otherwise, said check is to be returned to the undersigned.

Bidder

Note: Use this form, in lieu of Bid Bond form, when a cashier's check or certified check is accompanying the bid

BID BOND FORM

Name of Principal Shenk Real Estate Development Inc dba: Shenk Developers

Address 710 N Priscilla Ln

City of Burbank, State of California

as Principal, and The Ohio Casualty Insurance Company

corporation organized and existing under the laws of the State of New Hampshire, legally doing business in California as an admitted surety insurer at:

Address 790 The City Drive South Suite 200

City of Orange, State of California as Surety, are indebted to Pasadena Unified School District hereinafter called the District, in the sum of **TEN PERCENT (10%) OF THE TOTAL AMOUNT OF THE BID** of the Principal submitted to the District for which payment Principal and Surety bind ourselves, our heirs, executors, administrators, successors, and assigns, jointly and severally.

THE CONDITION OF THE OBLIGATION OF THIS BOND IS THAT THE PRINCIPAL has submitted the accompanying bid dated FEB. 16, 2023 for:

Bid Number 04-22/23 Marshall Band Room Ceiling and Roof Repair

NOW THEREFORE, if the Principal shall not withdraw said bid within the period specified therein after the opening of the same, or, if no period be specified, within ninety (90) days after said opening; and if the Principal is awarded the contract, and shall within the period specified therefore, or if no period be specified, within five (5) days after the prescribed forms are presented to him for signature, enter into a written contract with the District, in accordance with the bid as accepted and give bond with good and sufficient surety or sureties, as may be required, for the faithful performance and proper fulfillment of such contract and for the payment for labor and materials used for the performance of the contract or in the event of the withdrawal of said bid within the period specified or the failure to enter into such contract and give such bonds within the time specified, if the Principal shall pay the District the difference between the amount specified in said bid and the amount for which the District may procure the required work and/or supplies, if the latter amount be in excess of the former, together with all costs incurred by the District in again calling for bids, then the above obligation shall be void and of no effect, otherwise to remain in full force.

Surety, for value received, hereby stipulates and agrees that no change, extension of time, alteration or addition to the terms of the contract on the call for bids, or to the work to be performed there under, or the specifications accompanying the same, shall in any wise affect its obligation under this bond, and it does hereby waive notice of any such change, extension of time, alteration or addition to the terms of said contract or the call for bids, or to the work, or to the specifications.

In the event suit is brought upon this bond by the District and judgment is recovered, the Surety shall pay all costs incurred by the District in such suit, including a reasonable attorney's fee to be fixed by the court.

IN WITNESS WHEREOF this instrument has been duly executed by the Principal and Surety above-named on the 8th day of February, 2023

Shenk Developers

(Corporate Seal)

Principal

BY

H. Vorperian

HATCH VORPERIAN

(Typed or Printed Name)

PRESIDENT

(Title)

The Ohio Casualty Insurance Company

(Corporate Seal)

Surety

BY

Rebecca Haas-Bates

Address: 790 The City Drive South Suite 200

Rebecca Haas-Bates

City, State, Zip: Orange, CA 92868

(Typed or Printed Name)

Phone Number: (714) 937-1400

Attorney-in-Fact

E-Mail: Vu.Ho01@LibertyMutual.com

(Title)

(Attach Attorney-In-Fact Certificate)

Bid Number 04-22/23 Marshall Band Room Ceiling and Roof Repair

This form must be embossed with corporate seal when completed and submitted with your bid package

IMPORTANT:

Surety companies executing bonds must possess a certificate of authority from the California Insurance Commissioner authorizing them to write surety insurance defined in California Insurance Code section 105, and if the work or project is financed, in whole or in part, with federal, grant, or loan funds, it must also appear on the Treasury Department's most current list (Circular 570 as amended).

THIS IS A REQUIRED FORM.

Any claims under this bond may be addressed to:

(Name and Address of Surety)

The Ohio Casualty Insurance Company

790 The City Drive South Suite 200

Orange, CA 92868

(Name and Address of agent or representative for
service of process in California if different from above)

FOUNDATION RISK PARTNERS, CORP.

5530 Trabuco Road

Irvine, CA 92620

(Telephone Number of Surety and agent or
representative for service of process in California).

Surety: (714) 937-1400

Agent: (949) 679-7116

CALIFORNIA ALL-PURPOSE ACKNOWLEDGMENT

CIVIL CODE § 1189

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California)

County of Orange)

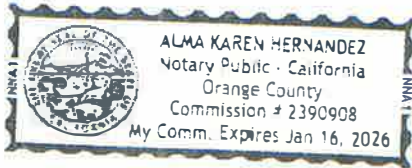
On 02/08/2023 before me, Alma Karen Hernandez, Notary Public
Date Here Insert Name and Title of the Officer

personally appeared Rebecca Haas-Bates
Name(s) of Signer(s)

who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.



Signature [Signature]
Signature of Notary Public

Place Notary Seal Above

OPTIONAL

Though this section is optional, completing this information can deter alteration of the document or fraudulent reattachment of this form to an unintended document.

Description of Attached Document

Title or Type of Document: Bid Bond Document Date: 02/08/2023
Number of Pages: Three(3) Signer(s) Other Than Named Above: _____

Capacity(ies) Claimed by Signer(s)

Signer's Name: Rebecca Haas-Bates
☐ Corporate Officer — Title(s): _____
☐ Partner — ☐ Limited ☐ General
☐ Individual ☒ Attorney in Fact
☐ Trustee ☐ Guardian or Conservator
☐ Other: _____

Signer Is Representing: _____
The Ohio Casualty Insurance Company

Signer's Name: _____
☐ Corporate Officer — Title(s): _____
☐ Partner — ☐ Limited ☐ General
☐ Individual ☐ Attorney in Fact
☐ Trustee ☐ Guardian or Conservator
☐ Other: _____

Signer Is Representing: _____



This Power of Attorney limits the acts of those named herein, and they have no authority to bind the Company except in the manner and to the extent herein stated.

Liberty Mutual Insurance Company
The Ohio Casualty Insurance Company
West American Insurance Company

Certificate No: **8205009 - 969336**

POWER OF ATTORNEY

KNOWN ALL PERSONS BY THESE PRESENTS: That The Ohio Casualty Insurance Company is a corporation duly organized under the laws of the State of New Hampshire, that Liberty Mutual Insurance Company is a corporation duly organized under the laws of the State of Massachusetts, and West American Insurance Company is a corporation duly organized under the laws of the State of Indiana (herein collectively called the "Companies"), pursuant to and by authority herein set forth, does hereby name, constitute and appoint, Rebecca Haas-Bates, Richard Adair, Sergio Bechara, William Syrkin

all of the city of Irvine state of CA each individually if there be more than one named, its true and lawful attorney-in-fact to make, execute, seal, acknowledge and deliver, for and on its behalf as surety and as its act and deed, any and all undertakings, bonds, recognizances and other surety obligations, in pursuance of these presents and shall be as binding upon the Companies as if they have been duly signed by the president and attested by the secretary of the Companies in their own proper persons.

IN WITNESS WHEREOF, this Power of Attorney has been subscribed by an authorized officer or official of the Companies and the corporate seals of the Companies have been affixed thereto this 10th day of March, 2021.



Liberty Mutual Insurance Company
The Ohio Casualty Insurance Company
West American Insurance Company

By: David M. Carey
David M. Carey, Assistant Secretary

State of PENNSYLVANIA
County of MONTGOMERY ss

On this 10th day of March, 2021 before me personally appeared David M. Carey, who acknowledged himself to be the Assistant Secretary of Liberty Mutual Insurance Company, The Ohio Casualty Company, and West American Insurance Company, and that he, as such, being authorized so to do, execute the foregoing instrument for the purposes therein contained by signing on behalf of the corporations by himself as a duly authorized officer.

IN WITNESS WHEREOF, I have hereunto subscribed my name and affixed my notarial seal at King of Prussia, Pennsylvania, on the day and year first above written.



Commonwealth of Pennsylvania - Notary Seal
Teresa Pastella, Notary Public
Montgomery County
My commission expires March 28, 2025
Commission number 1126044
Member, Pennsylvania Association of Notaries

By: Teresa Pastella
Teresa Pastella, Notary Public

This Power of Attorney is made and executed pursuant to and by authority of the following By-laws and Authorizations of The Ohio Casualty Insurance Company, Liberty Mutual Insurance Company, and West American Insurance Company which resolutions are now in full force and effect reading as follows:

ARTICLE IV – OFFICERS: Section 12. Power of Attorney.

Any officer or other official of the Corporation authorized for that purpose in writing by the Chairman or the President, and subject to such limitation as the Chairman or the President may prescribe, shall appoint such attorneys-in-fact, as may be necessary to act in behalf of the Corporation to make, execute, seal, acknowledge and deliver as surety any and all undertakings, bonds, recognizances and other surety obligations. Such attorneys-in-fact, subject to the limitations set forth in their respective powers of attorney, shall have full power to bind the Corporation by their signature and execution of any such instruments and to attach thereto the seal of the Corporation. When so executed, such instruments shall be as binding as if signed by the President and attested to by the Secretary. Any power or authority granted to any representative or attorney-in-fact under the provisions of this article may be revoked at any time by the Board, the Chairman, the President or by the officer or officers granting such power or authority.

ARTICLE XIII – Execution of Contracts: Section 5. Surety Bonds and Undertakings.

Any officer of the Company authorized for that purpose in writing by the chairman or the president, and subject to such limitations as the chairman or the president may prescribe, shall appoint such attorneys-in-fact, as may be necessary to act in behalf of the Company to make, execute, seal, acknowledge and deliver as surety any and all undertakings, bonds, recognizances and other surety obligations. Such attorneys-in-fact subject to the limitations set forth in their respective powers of attorney, shall have full power to bind the Company by their signature and execution of any such instruments and to attach thereto the seal of the Company. When so executed such instruments shall be as binding as if signed by the president and attested by the secretary.

Certificate of Designation – The President of the Company, acting pursuant to the Bylaws of the Company, authorizes David M. Carey, Assistant Secretary to appoint such attorneys-in-fact as may be necessary to act on behalf of the Company to make, execute, seal, acknowledge and deliver as surety any and all undertakings, bonds, recognizances and other surety obligations.

Authorization – By unanimous consent of the Company's Board of Directors, the Company consents that facsimile or mechanically reproduced signature of any assistant secretary of the Company, wherever appearing upon a certified copy of any power of attorney issued by the Company in connection with surety bonds, shall be valid and binding upon the Company with the same force and effect as though manually affixed.

I, Renee C. Llewellyn, the undersigned, Assistant Secretary, The Ohio Casualty Insurance Company, Liberty Mutual Insurance Company, and West American Insurance Company do hereby certify that the original power of attorney of which the foregoing is a full, true and correct copy of the Power of Attorney executed by said Companies, is in full force and effect and has not been revoked.

IN TESTIMONY WHEREOF, I have hereunto set my hand and affixed the seals of said Companies this 8th day of February, 2023.



By: Renee C. Llewellyn
Renee C. Llewellyn, Assistant Secretary

Not valid for mortgage, note, loan, letter of credit, currency rate, interest rate or residual value guarantees.

For bond and/or Power of Attorney (POA) verification inquiries, please call 610-832-8240 or email HOSUR@libertymutual.com.

STATE OF CALIFORNIA
DEPARTMENT OF INSURANCE
SAN FRANCISCO

Amended
Certificate of Authority

THIS IS TO CERTIFY, *That, pursuant to the Insurance Code of the State of California,*

The Ohio Casualty Insurance Company

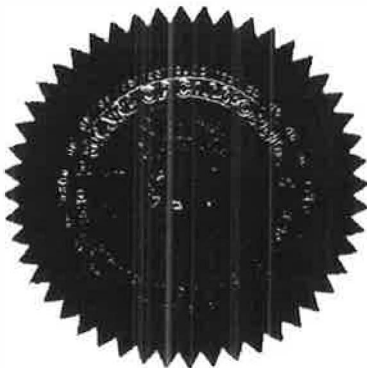
of New Hampshire, organized under the laws of New Hampshire, subject to its Articles of Incorporation or other fundamental organizational documents, is hereby authorized to transact within this State, subject to all provisions of this Certificate, the following classes of insurance:

**Fire, Marine, Surety, Plate Glass, Liability, Workers' Compensation,
Common Carrier Liability, Boiler and Machinery, Burglary, Credit,
Sprinkler, Automobile and Miscellaneous**

as such classes are now or may hereafter be defined in the Insurance Laws of the State of California.

THIS CERTIFICATE is expressly conditioned upon the holder hereof now and hereafter being in full compliance with all, and not in violation of any, of the applicable laws and lawful requirements made under authority of the laws of the State of California as long as such laws or requirements are in effect and applicable, and as such laws and requirements now are, or may hereafter be changed or amended.

IN WITNESS WHEREOF, *effective as of the 19th day of March, 2013, I have hereunto set my hand and caused my official seal to be affixed this 19th day of March, 2013.*



By

Dave Jones
Insurance Commissioner

Valerie J. Sarfaty
for Nettie Hoge
Chief Deputy

NOTICE:

Qualification with the Secretary of State must be accomplished as required by the California Corporations Code promptly after issuance of this Certificate of Authority. Failure to do so will be a violation of Insurance Code section 701 and will be grounds for revoking this Certificate of Authority pursuant to the covenants made in the application therefor and the conditions contained herein.

REQUEST FOR SUBSTITUTION AT TIME OF BID

Pursuant to Public Contract Code section 3400, bidder submits the following request to Substitute with the bid that is submitted. I understand that if the request to substitute is not “an/or equal” or is not accepted by District and I answer “no” I will not provide the specified item, then I will be held non-responsive and my bid will be rejected. With this understanding, I hereby request Substitution of the following articles, devices, equipment, products, materials, fixtures, patented processes, forms, methods, or types of construction:

	Specification Section	Specified Item	Requested Substituted Item	Contractor Agrees to Provide Specified Item if request to Substitute is Denied ¹ (circle one)	District Decision (circle one)
1.				Yes No	Grant Deny
2.				Yes No	Grant Deny
3.				Yes No	Grant Deny
4.				Yes No	Grant Deny
5.				Yes No	Grant Deny
6.				Yes No	Grant Deny
7.				Yes No	Grant Deny
8.				Yes No	Grant Deny
9.				Yes No	Grant Deny
10.				Yes No	Grant Deny
11.				Yes No	Grant Deny
12.				Yes No	Grant Deny

This Request Form must be accompanied by evidence as to whether the proposed Substitution (1) is equal in quality, service, and ability to the Specified Item; (2) will entail no change in detail, construction, and scheduling of related work; (3) will be acceptable in consideration of the required design and artistic effect; (4) will provide no cost disadvantage to the District; (5) will require no excessive or more expensive

¹ Bidder must state whether bidder will provide the Specified Item in the event the Substitution request is evaluate and denied. If bidder states that bidder will not provide the Specified Item the denial of a request to Substitute shall result in the rejection of the bidder as non-responsive. However, if bidder states that bidder will provide the Specified Item in the event that bidder's request for Substitution is denied, bidder shall execute the Agreement and provide the Specified Item(s). If bidder refuses to execute the Agreement due to the District's decision to require the Specified Item(s) at no additional cost, bidder's Bid Bond shall be forfeited.

maintenance, including adequacy and availability of replacement parts; (6) will require no change of the construction schedule or milestones for the Project; and, (7) Contractor agrees to pay for any DSA Fees or other Governmental Plan check costs associated with this Substitution Request. (See General Conditions Section 3.6)

The undersigned states that the following paragraphs are correct:

1. The proposed Substitution does not affect the dimensions shown on the Drawings.
2. The undersigned will pay for changes to the building design, including Architect, engineering, or other consultant design, detailing, DSA plan check or other governmental plan check costs, and construction costs caused by the requested substitution.
3. The proposed substitution will have no adverse effect on other trades, the Contract Time, or specified warranty requirements.
4. Maintenance and service parts will be available locally for the proposed substitution.
5. In order for the Architect to properly review the substitution request, within five (5) days following the opening of bids, the Contractor shall provide samples, test criteria, manufacturer information, and any other documents requested by Architect or Architect's engineers or consultants, including the submissions that would ordinarily be required under Article 3.7 for Shop Drawings along with a document which provides a side by side comparison of key characteristics and performance criteria (often known as a CSI side by side comparison chart).
6. If Substitution Request is accepted by the District, Contractor is still required to provide a Submittal for the substituted item pursuant to Article 3.7 and shall provide required Schedule information (including schedule fragnets, if applicable) for the substituted item as required under Article 8.3.2.1. The approval of the Architect, Engineer, or District of the substitution request does not mean that the Contractor is relieved of Contractor's responsibilities for Submittals, Shop Drawings, and schedules under Article 3.7 and 8.3.2 if the Contractor is awarded the Project.

Name of Bidder: SHENK DEVELOPERS

By: HATCH NORPERIAN

District: _____

By: _____

ACKNOWLEDGMENT OF BIDDING PRACTICES REGARDING INDEMNITY FORM

TO: Pasadena Unified School District

RE: Project Number 04-22/23

Construction Contract for MARSHALL BAND ROOM CEILING & ROOF REPAIR

Please be advised that with respect to the above-referenced Project the undersigned Contractor on behalf of itself and all subcontractors hereby waives the benefits and protection of Labor Code section 3864, which provides:

"If an action as provided in this chapter is prosecuted by the employee, the employer, or both jointly against the third person results in judgment against such third person, the employer shall have no liability to reimburse or hold such third person harmless on such judgment or settlement in the absence of a written agreement to do so executed prior to the injury."

This Agreement has been signed by an authorized representative of the contracting party and shall be binding upon its successors and assignees. The undersigned further agrees to promptly notify the District of any changes of ownership of the contracting party or any subcontractor while this Agreement is in force.

SHEENK DEVELOPERS
Contracting Party

HATCH VORPERIAN / PRESIDENT
Name of Agent/Title

**DISABLED VETERAN BUSINESS ENTERPRISE (DVBE) PARTICIPATION
STATEMENT**

Each bidder must complete this form in order to comply with the Pasadena Unified School District ("District") policy for participation of disabled veteran business enterprises (School District projects funded in whole or in part by the State of California pursuant to the Leroy F. Greene School Facilities Act of 1998. (Education Code §17070.10, *et seq.*)

Project Name: MARSHALL BAND ROOM CEILING & ROOF REPAIRS

Bid No.: 04 - 22/23

DSA No.: PTN: 64881-176 / APP: 03-122793

The undersigned, on behalf of the Contractor named below, certifies that the Contractor has made reasonable efforts to secure participation by DVBE in the Contract to be awarded for the above-referenced Bid No., including participation by DVBE subcontractors and/or material suppliers. **Check only one of the following:**

☒ The Contractor was unable after reasonable efforts to secure DVBE participation in the Contract for the above-referenced Project/Bid No. However, the Contractor will use DVBE services if the opportunity arises at any time during construction of the Project. Upon completion of the Project, the Contractor will report to the District the total dollar amount of DVBE participation in any Contract awarded to Contractor, and in any change orders, for the above-referenced Project.

☐ The Contractor has secured DVBE participation in the Contract for the above referenced Project/Bid No., and anticipates that such DVBE participation will equal approximately _____ dollars (\$ _____), which represents approximately _____ percent (____%) of the total Contract for such Project. Upon completion of the Project, Contractor will report to the District the actual total dollar amount of DVBE participation in the Contract awarded to Contractor, and in any change orders, for such Project

Company: SHENK DEVELOPERS

Name: HATCH VORPERIAN

Title: PRESIDENT

Signature: H. Vorperian

Date: 2.15.23

CONTRACTOR'S CERTIFICATE REGARDING DRUG-FREE WORKPLACE

This Drug-Free Workplace Certification form is required from all successful bidders pursuant to the requirements mandated by Government Code section 8350 et seq., the Drug-Free Workplace Act of 1990. The Drug-Free Workplace Act of 1990 requires that every person or organization awarded a contract or grant for the procurement of any property or service from any State agency must certify that it will provide a drug-free workplace by performing certain specified acts. In addition, the Act provides that each contract or grant awarded by a State agency may be subject to suspension of payments or termination of the contract or grant, and the Contractor or grantee may be subject to debarment from future contracting, if the contracting agency determines that specified acts have occurred.

Pursuant to Government Code section 8355, every person or organization awarded a contract or grant from a State agency shall certify that it will provide a drug-free workplace by doing all of the following:

1. Publishing a statement, notifying employees that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited in the person's or organization's workplace, and specifying actions which will be taken against employees for violations of the prohibition.
2. Establishing a drug-free awareness program to inform employees about all of the following:
 - a. The dangers of drug abuse in the workplace;
 - b. The person's or organization's policy of maintaining a drug-free workplace;
 - c. The availability of drug counseling, rehabilitation and employee-assistance programs; and
 - d. The penalties that may be imposed upon employees for drug abuse violations;
3. Requiring that each employee engaged in the performance of the contract or grant be given a copy of the statement required by subdivision (a) and that, as a condition of employment on the contract or grant, the employee agrees to abide by the terms of the statement.

I, the undersigned, agree to fulfill the terms and requirements of Government Code section 8355 listed above and will (a) publish a statement notifying employees concerning the prohibition of controlled substance at the workplace, (b) establish a drug-free awareness program, and (c) require each employee engaged in the performance of the contract be given a copy of the statement required by section 8355(a) and require such employee agree to abide by the terms of that statement.

I also understand that if the Pasadena Unified School District determines that I have either (a) made a false certification herein, or (b) violated this certification by failing to carry out the requirements of Section 8355, that the contract awarded herein is subject to termination, suspension of payments, or both. I further understand that, should I violate the terms of the Drug-Free Workplace Act of 1990, I may be subject to debarment in accordance with the requirements of Section 8350 et seq.

I acknowledge that I am aware of the provisions of Government Code section 8350 et seq. and hereby certify that I will adhere to the requirements of the Drug-Free Workplace Act of 1990.

DATE: 2.15.23 SHENK DEVELOPERS
CONTRACTOR

By: HRATCH VORPERIAN
Signature H. Vorperian

CONTRACTOR'S CERTIFICATE REGARDING ALCOHOLIC BEVERAGE AND
TOBACCO-FREE CAMPUS POLICY

The Contractor agrees that it will abide by and implement the District's Alcoholic Beverage and Tobacco-Free Campus Policy, which prohibits the use of alcoholic beverages and tobacco products, of any kind and at any time, in District owned or leased buildings, on District property and in District vehicles. The Contractor shall procure signs stating "ALCOHOLIC BEVERAGE AND TOBACCO USE IS PROHIBITED" and shall ensure that these signs are prominently displayed in all entrances to school property at all times.

DATE: 2.15.23

SHENK DEVELOPERS
CONTRACTOR

By: HRATCH VORPERIAN
Signature



[End of Bid Documents to be Submitted with Bid]

BID RECAP NO. 04-22/23	
------------------------	--

MARSHALL BAND ROOM CEILING AND ROOF REPAIR

OPENING DATE AND TIME 02/16/2023 2:00 PM
--

[illegible]

**BOARD OF EDUCATION
PASADENA UNIFIED SCHOOL DISTRICT
PASADENA, CALIFORNIA**

Topic: APPROVAL TO PROCEED WITH AWARD OF CONTRACTOR FOR THE HVAC REPLACEMENT PROJECT

RECOMMENDATION: The Governing Board of the Pasadena Unified School District approves staff to proceed with Award of Contract for the Removal and Replacement of HVAC units on the Roofs being Replaced in the Summer of 2023, to Diversified Thermal Services.

Anticipated Effect on Student Outcomes: Implementation of Measure O Bond Capital Projects to ensure a modern, safe, and orderly environment that supports and inspires student learning.

I. BACKGROUND:

The District is continuing with its roof replacement project this summer. This is phase II of roof replacement project. Phase I was completed last summer. The phase II project includes many roofs that have HVAC systems that are past their useful life and these units will not be able to withstand their removal and reinstallation after the roof repairs are completed. Therefore, these HVAC units are being replaced with new units.

The project was posted to PlanetBids as, Roof HVAC Replacement Project, RFP 05-22/23 RFP 04-22/23 on 01/09/2023 and the bid deadline was 02/16/2023.

II. STAFF ANALYSIS:

Upon review of the responsive bidders, it is recommended that the Board award the contract to Diversified Thermal Services.

Attachment: Diversified Thermal Services Proposal and RFP scoring sheet

III. FISCAL IMPACT:

Funds not to exceed the amount of \$1,364,561.00 are available from Measure O Capital Projects Fund. This amount includes an allowance for a district-controlled contingency of \$200,000.

**Pasadena Unified School District
Board of Education Agenda
March 23, 2023
Submitted by: _____
Leslie Barnes, Ed.D., Chief Finance and Operations Officer**

Funding title/code:

Title: Measure O Capital Projects Fund.

Codes: 21.3-97094.0-00000-85000-6270-0360000 \$173,694.00 Loma Alta ES (Construction)

Codes: 21.3-97094.0-00000-85000-6270-0360000 \$40,000.00 Loma Alta ES (Contingency)

Codes: 21.3-97094.0-00000-85000-6270-0560000 \$757,114.00 Webster ES (Construction)

Codes: 21.3-97094.0-00000-85000-6270-0560000 \$40,000.00 Webster ES (Contingency)

Codes: 21.3-97094.0-00000-85000-6270-0140000 \$41,495.00 Don Benito ES (Construction)

Codes: 21.3-97094.0-00000-85000-6270-0140000 \$40,000.00 Don Benito ES (Contingency)

Codes: 21.3-97094.0-00000-85000-6270-0600000 \$109,408.00 Norma Coombs ES (Construction)

Codes: 21.3-97094.0-00000-85000-6270-0600000 \$40,000.00 Norma Coombs ES (Contingency)

Codes: 21.3-97094.0-00000-85000-6270-0840000 \$82,850.00 Pasadena HS (Construction)

Codes: 21.3-97094.0-00000-85000-6270-0840000 \$40,000.00 Pasadena HS (Contingency)

Approved:

Brian O. McDonald, Ed.D. Superintendent

Originated by: Leonard Hernandez, Jr., Director of Facilities, Maintenance, Operations and Transportation

DIVERSIFIED THERMAL SERVICES

PASADENA
UNIFIED SCHOOL DISTRICT
351 SOUTH HUDSON AVENUE
PASADENA, CA 9169

ROOF HVAC REPLACEMENT PROJECT
BID NO. 05-22/23
Loma Alta ES, Webster ES, Norma Coombs ES, Don
Benito ES, Pasadena HS

DATE

16 FEBRUARY 2023

PROPOSED BY

Rey Agustin & Robert Lowman
ACCOUNT MANAGERS

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LETTER OF INTEREST

IN THIS SECTION:

- LETTER OF INTEREST
- DTS BID CONTACT LIST

SECTION
A

(1.0) Cover Letter / Letter of Interest

February 16, 2023

Pasadena Unified School District
351 S Hudson Ave
Pasadena, CA 9169
Attn: Don Cristobal, Project Manager

Project Name: Bid No. 05-22/23 Roof HVAC Replacement Project

Dear Mr. Cristobal,

Diversified Thermal Services (DTS) is pleased to provide this formal response to the Pasadena Unified School District's HVAC Replacement request for proposal. Our goal is to provide you with a comprehensive, well-designed HVAC Replacement solution to upgrade the comfort and safety of the students, staff and visitors to the Five Schools indicated in this project. In addition, DTS stands ready to meet the challenges the District is facing to perform this project in conjunction with major roof upgrades.

We ask that you provide additional considerations when reviewing our team's References and Relevant Experience History. We believe Diversified Thermal Services is ahead of the competition as it relates to the development and execution of such a project.

We have also expanded our relationship with some districts by offering a Student Internship HVAC program. The opportunity to educate students on the merits of pursuing a career in the HVAC industry has been a rewarding endeavor. Please refer to section 5.0 for details.

Our team is not only well educated in the criteria in which the Pasadena Unified School District's HVAC Roof Replacement Project is based on, we also greatly appreciate the level of detail and hard work that the District put into the development of this RFP. Much like the District, Diversified Thermal Services has taken a very meticulous approach to building this response and we look forward to receiving your feedback.

Thank you for your consideration,

Diversified Thermal Services, Inc.

(1.1) Contact Information

DTS Contact Information	DTS Authorized Signees
Rey Agustin, Account Manager (714) 392-1442 reya@dthermal.net	Craig Steinmetz, CEO & President (714) 632-7401 craigs@dthermal.net
Robert Lowman, Account Manager (714) 351-9384 robertl@dthermal.net	Matt Morgan, Vice President Sales (714) 632-7401 brians@dthermal.net

FIRM INFORMATION

IN THIS SECTION:

- QUALIFICATION OF FIRM
 - ❖ DESCRIPTION & HISTORY
 - ❖ PHILOSOPHY
 - ❖ CA CONTRACTOR'S LICENSE
 - ❖ DIR
 - ❖ EIN
 - ❖ EVIDENCE OF COVERAGE
 - ❖ BONDING LETTER
 - ❖ EMR MOD RATE
- PROVIDER QUALIFICATIONS
 - ❖ STAFFING
 - ❖ EMPLOYEE TRAINING
- ORGANIZATIONAL CHARTS
 - ❖ EXECUTIVE TEAM
 - ❖ CONSTRUCTION TEAM
- TEAM QUALIFICATIONS
 - ❖ CONSTRUCTION TEAM

SECTION
B

(2.0) Corporate Summary

(2.1) Qualification of Firm

Diversified Thermal Services, Inc. (DTS) is pleased to submit a bid for the 05-22/23 Roof HVAC Replacement Project at Five (5) Schools for the Pasadena Unified School District. Contact information for the bid/project can be located in Section 1.1.

DTS brings over 25 years of experience with both public and private K-12 schools, as well as higher education institutions.

(2.2) Corporate Description & History

Established in 1990 with over 30 years of mechanical construction and retrofit services, Diversified Thermal Services, Inc. has established itself among the premier mechanical and automation contractors in the Pacific Southwest. DTS is a leading provider of HVAC solutions and prides itself on being a “single source” provider for turnkey installations of HVAC/R and Building Automation systems. Diversified Thermal Services was established in 1990 by founder Craig Steinmetz with an emphasis on the commercial and industrial HVAC/R industry. DTS is owned by Service Logic and continues to uphold the standards and ethics established by DTS, as well as being held to our parent company’s high level of service. Our firm is a California based Corporation. Diversified Thermal Services is signatory to the Steam-Refrigeration-Air Conditioning-Pipefitters Local Union 250. We currently employ over 160 talented industry professionals providing quality services to our customers and their facilities.

The foundation of Diversified Thermal Services success has been realized through our distinguished product offerings, professional staff, and a mission to make customers for life. We believe in a top-down approach to operating our business and employ only talented professionals that maintain innovative mindsets, creativity, and have industry expertise that can be utilized to provide our customers with an exceptional customer experience, today and into the future.

(2.3) Diversified Thermal Services’ Philosophy

Our objective for executing the proposed program is to provide Roof HVAC Replacement Project with the highest caliber service and expertise that delivers high quality standards set forth by the RFP. In response to this proposal, our team kept the following priorities in mind:

- ❖ District’s Scope of Work & Safety Requirements
- ❖ Mechanical Equipment Functionality and Efficiency
- ❖ Provisions of Available Resources for a Successful Service Execution
- ❖ Client Expectations Relating to Service Execution
- ❖ Project Approach & Execution Plan
- ❖ Sub-Contractor Competency
- ❖ Additional Value-Add Opportunities
- ❖ Overall Project Cost

Our mission is to create customers for life through exceptional customer service and satisfaction by implementing safe, innovative, and efficient HVAC solutions and services. We actively promote professionalism and unparalleled quality, by empowering our people to deliver a premier product that adds value and longevity to our Customer's infrastructure and assets.

(2.4) Licenses

California Contractor's License
License # 609967 Classifications: B, C6, C20, C38 Expires: 02/28/2025

Department of Industrial Relations
DIR # 60000671 Expires: 06/30/2025

Federal Tax ID
Federal Tax ID (EIN) #: 33-0399022

(2.5) MOD Rate for the last (5) Years

Workers Compensation History



**MARSH & MCLENNAN
AGENCY**

Marsh & McLennan Insurance Agency LLC
1 Potrero Way, Suite 200
Aliso Viejo, CA 92656
(714) 949-0000
MarshMMA.com
CA Insurance Lic. #0610133

October 3, 2022

Diversified Thermal Services
1220 North Barsten Way
Anaheim, CA 92806

Subject: Workers' Compensation Experience Modification Rates

To Whom It May Concern:

The Workers' Compensation history for Diversified Thermal Services, Inc. is as follows:

Policy Term	Policy Number	Carrier	Experience Mod
10/1/2022-10/1/2023	WC551381705	American Zurich Ins. Co.	.78
10/1/2021-10/1/2022	WC551381704	American Zurich Ins. Co.	.63
10/1/2020-10/1/2021	WC551381703	American Zurich Ins. Co.	.72
10/1/2019-10/1/2020	WC551381702	American Zurich Ins. Co.	.75
10/1/2018 – 10/1/2019	WC551381701	Zurich American Ins. Co.	.79

Coverage Limits:

E.L. Each Accident **\$1,000,000**
E.L. Disease – Ea Employee **\$1,000,000**
E.L. Disease – Policy Limit **\$1,000,000**

Should you have any questions or need additional information, please feel free to contact our office.

Sincerely,

Brenda Marin
Client Manager
Marsh & McLennan Insurance Agency, LLC

WORLD CLASS. LOCAL TOUCH

(2.6) Insurance – Evidence of Coverage

Insurance Coverage																					
		CERTIFICATE OF LIABILITY INSURANCE				<div style="display: flex; justify-content: space-between;"> <div>4/1/2023</div> <div>DATE (MM/DD/YYYY) 12/29/2022</div> </div>															
<p><small>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</small></p> <p><small>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</small></p>																					
PRODUCER Lockton Companies 444 W. 47th Street, Suite 900 Kansas City MO 64113-1906 (816) 960-9000 lccsuz@lockton.com					CONTACT PHONE (Int'l. Area Code) _____ FAX (Int'l. Area Code) _____ E-MAIL ADDRESS _____ ADDRESS _____																
INSURED 1517459 DIVERSIFIED THERMAL SERVICES, INC. 1220 NORTH BARSTEN WAY ANAHEIM CA 92806					<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">INSURER AFFORDING COVERAGE</th> <th style="text-align: left;">NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Greenwich Insurance Company</td> <td>22322</td> </tr> <tr> <td>INSURER B: The Cincinnati Insurance Company</td> <td>10677</td> </tr> <tr> <td>INSURER C: XL Insurance America, Inc.</td> <td>24554</td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> </tbody> </table>					INSURER AFFORDING COVERAGE	NAIC #	INSURER A: Greenwich Insurance Company	22322	INSURER B: The Cincinnati Insurance Company	10677	INSURER C: XL Insurance America, Inc.	24554	INSURER D:		INSURER E:	
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INSURER D:																					
INSURER E:																					
COVERAGES CERTIFICATE NUMBER: 19218512 REVISION NUMBER: XXXXXXXX																					
<p><small>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</small></p>																					
INSUR	LTD	TYPE OF INSURANCE	ACORD	TERR	POLICY NUMBER	POLICY EFF. (MM/DD/YYYY)	POLICY EXP. (MM/DD/YYYY)	LIMITS													
A	X	COMMERCIAL GENERAL LIABILITY	N	N	RGD300147503	12/3/2022	4/1/2023	EACH OCCURRENCE \$ 2,000,000 CLAIMS-MADE \$ 500,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000													
		CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/>																			
		GEN'L AGGREGATE LIMIT APPLIES PER																			
		POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC <input type="checkbox"/>																			
		OTHER																			
A		AUTOMOBILE LIABILITY	N	N	RAD943796403	12/3/2022	4/1/2023	COMBINED SINGLE LIMIT \$ 5,000,000 BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX													
		ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/> AUTOS ONLY <input type="checkbox"/>																			
B	X	UMBRELLA LIAB	N	N	EXS0172000	12/3/2022	4/1/2023	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000													
		EXCESS LIAB <input type="checkbox"/> RETENTION \$ 0																			
C		WORKERS COMPENSATION AND EMPLOYERS' LIABILITY	N	N/A	KWD3001476-03	12/3/2022	4/1/2023	EL - STATUTE <input checked="" type="checkbox"/> EL - EMERGENCY <input type="checkbox"/> EL - EACH ACCIDENT \$ 1,000,000 EL - DISEASE - EACH EMPLOYEE \$ 1,000,000 EL - DISEASE - POLICY LIMIT \$ 1,000,000													
		ANY PROPRIETARY TURF/ARTIFICIAL TURF EXCLUDED BY CLAIMS? <input checked="" type="checkbox"/> (Indemnity provided) If yes, describe under DESCRIPTION OF OPERATIONS below			STOP GAP: ND, OH, WA, WY																
DESCRIPTION OF OPERATIONS, LOCATIONS, VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)																					
CERTIFICATE HOLDER 19218512 EVIDENCE OF INSURANCE					CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE: <i>[Signature]</i>																
ACORD 25 (2016/03) The ACORD name and logo are registered marks of ACORD © 1988-2015 ACORD CORPORATION. All rights reserved.																					

(2.7) Bonding Capabilities

Surety Bonding Letter



UNCOMMONLY INDEPENDENT

December 27, 2022

RE: Diversified Thermal Services, LLC

To Whom It May Concern:

We understand you are considering a relationship with Diversified Thermal Services, LLC and have requested information concerning the company's surety bond program.

Harco National Insurance Company is the surety for Diversified Thermal Services, LLC. Harco is listed in the U.S. Department of Treasury's Listing of Certified Companies (Circular 570) with Treasury limits of \$67,328,000, and they are rated "A-" by A.M. Best Company, with a Financial Size Category of XI.

Harco National Insurance Company stands ready to support bid bonds, as well as performance and payment bonds for Diversified Thermal Services, LLC, as part of the Service Logic family of companies, in excess of \$15,000,000.00 for single projects, with an aggregate program of \$30,000,000.00. We would look favorably on supporting a bond at the request of our client; however, our support is conditioned upon completion of the underwriting process, including satisfactory review of contract documents, confirmation of financing and our ongoing review of the operational and financial capacity of Diversified Thermal Services, LLC.

Please understand, this letter is not to be construed as an agreement to provide bonds for any particular project, but it is offered as an indication of our past experience and confidence in Diversified Thermal Services, LLC. Any arrangement to provide final bonds is a matter between Diversified Thermal Services, LLC and their sureties and we assume no liability to third parties if we do not execute said bonds.

We highly recommend Diversified Thermal Services, LLC to you. They are well managed, financed, and truly capable of meeting your requirements. If you have any questions in regards to this letter, do not hesitate to call.

Sincerely,
HARCO NATIONAL INSURANCE COMPANY

Rebecca S. Leal
Rebecca S. Leal
Authorized Signatory
State of Missouri
County of Jackson

The foregoing instrument was acknowledged before me this 27th day of December 2022, by Rebecca S. Leal, Authorized Signatory for Harco National Insurance Company.

My Commission Expires: 02/15/2024

TAHITI M. FRY
NOTARY PUBLIC-NOTARY SEAL
STATE OF MISSOURI
JACKSON COUNTY
MY COMMISSION EXPIRES 2/15/2024
COMMISSION # 12303541

LOCKTON COMPANIES
444 West 47th Street, Suite 900, Kansas City, MO 64112-1906

816.960.9000
lockton.com

(3.0) Provider Qualifications & Staffing

(3.1) Staffing

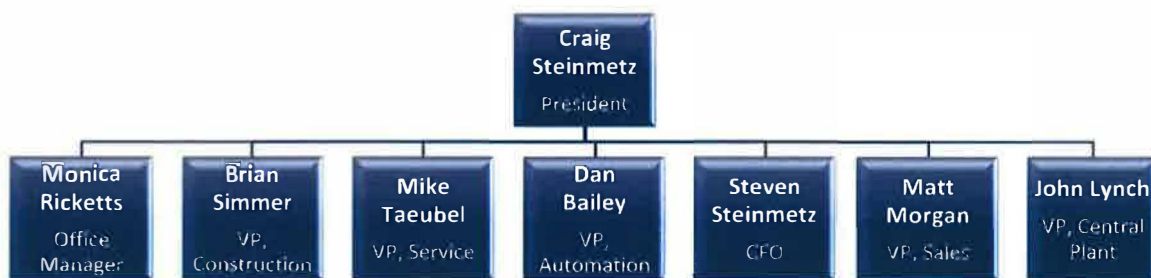
Total Amount of Active Employees: 172

Staffing Structure: Field Employees > Field Lead/Supervisor > Office Support Staff > Project Managers > Department Managers > Owner

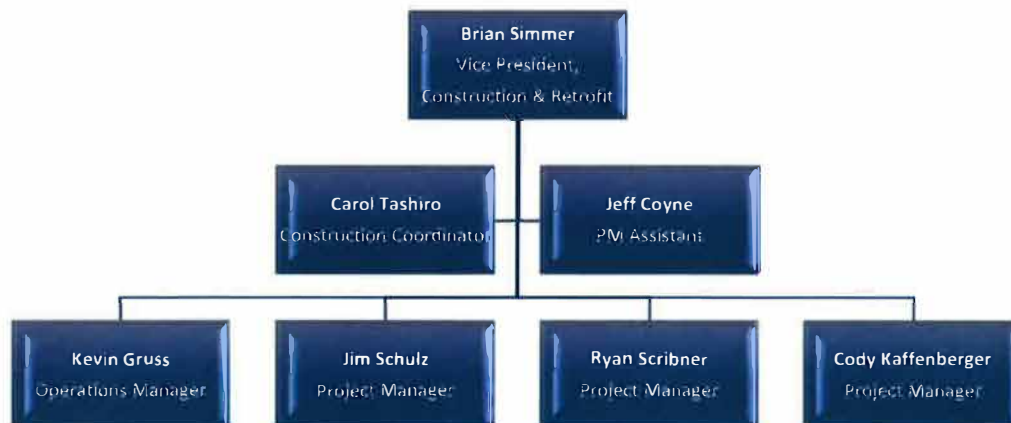
Company 2021 Revenue: \$51M

With sites in Southern California, Nevada, & Texas, Diversified Thermal Services confidently employs a depth of technicians and supporting staff to ensure that Client needs are met in a time sensitive and high-quality fashion.

(3.2) Executive Management Team Org Chart



(3.3) Construction Team Org Chart



(3.4) Construction Team Qualifications

Brian Simmer, Vice President Construction & Retrofit: Mr. Simmer has over 20 years of experience in the HVAC/R industry. As a graduate of the 5-year Local Union 250 Apprenticeship Program and Cypress College HVAC/R program, he has extensive knowledge as a journeyman prior to being promoted to Construction manager. Mr. Simmer manages the system installations, process overview, verification of subcontractor performance, and equipment accuracy/delivery. His hands-on experience and system knowledge, coupled with his project design background, ensures that he gets projects completed on time and under budget.

Kevin Gruss, Operations Manager: Mr. Gruss is our operations manager that has been in the HVAC industry since 2008 and has experience in the field, sales, and management aspects. Kevin has extensive knowledge of K-12 projects, including DSA regulations, OSHA requirements, Safety Practices effecting Students & Staff, Ventilation Optimization, and DIR compliance. He is very detail oriented and goes above and beyond to ensure the customer is satisfied with the completed jobs. He has managed multiple Mechanical, Retro-Fit projects, and New Construction projects up to \$8.5M. He ensures the highest standard of quality work with our field crews and management process, to make sure our customers' expectations have exceeded expectations. Kevin inserts his full attention toward the customer experience and takes personal pride in every project and communication.

Jim Schulz, Project Manager: Mr. Schulz is our project manager that runs all larger tonnage retrofit and construction projects, including sheet metal projects and day-to-day field positions. Jim has over 20 years in the HVAC industry and takes great pride in meeting customer's expectations & time frames.

Ryan Scribner, Project Manager: Mr. Scribner is our Project Specialist who manages a variety of construction jobs including office build-outs, commercial refrigeration installations and commercial HVAC retrofits. Ryan has over 8 years in the HVAC Industry with an education in Construction Management, Construction Technology and Business Administration.

Cody Kaffenberger, Project Manager: Mr. Kaffenberger is our project manager that has been with Diversified since 2007. After showing consistent and tenacious dedication to producing results in the field, he began serving as Project Foreman in 2016. Stepping into a project manager role in 2021, he continues to demonstrate the attention to detail and pride in his work that has always kept customers satisfied. Cody enjoys building relationships with his customers and making sure they have all their wants and needs promptly addressed across the duration of his projects.

Carol Tashiro, Coordinator: Ms. Tashiro is our project administrator who has worked in a variety of industries such as golf, electronics, and HVAC as support to management teams since 1998. She is very organized, detail oriented, reliable, punctual, thrives on efficiency, and comfortable working in a highly busy environment. Carol is able to multitask, prioritize, and meet deadlines as needed and enjoys the customer service aspects of her position.

Jeff Coyne, Project Manager Assistant: Mr. Coyne is our project manager support who worked primarily in commercial property insurance, prior to HVAC. He is very meticulous, tenacious, and thrives working under pressure. Jeff shows a dedication to continually streamlining work processes and can meet deadlines as needed to ensure customer satisfaction.

PRIOR RELEVANT EXPERIENCE

IN THIS SECTION:

- PRIOR RELEVANT PROJECT EXPERIENCE
- COMMUNITY OUTREACH – STUDENT INTERNSHIP PROGRAM

SECTION
C

(4.0) Relevant Project Experience

HVAC Projects

Diversified Thermal Services is an industry leading full-service HVAC mechanical and building automation contractor, specializing in providing turnkey facility solutions and ongoing 24/7 technical support. Our leadership team possesses over 100 years of industry knowledge with an extensive core competency covering all facets of the Mechanical Construction and Service trade. Diversified Thermal Services has the unique capability to offer a wholistic approach to assess current system conditions, diagnose the appropriate corrective measures, and provide the capital planning resources to assist the Pasadena USD team in developing a secure roadmap for the future. It is our top priority to deliver impeccable customer service and satisfaction, all the while providing reliable communication to the Pasadena USD team.

Buena Park Unified School District

District-Wide HVAC Replacement	
Company Name	Buena-Park Unified School District
Jobsite Address	6885 Orangethorpe Ave, Buena Park CA
Telephone Number	714.474.6639
Reference Name(s)	Tim Spencer
Contract Amount	\$324,925.00
Year Completed	2020
Services Provided	Remove existing HVAC Units and replace with upgraded equipment at the following elementary schools; Beatty, Corey, Emery, Whitaker, and Pasadena Unified Junior High School, and the District Office.

Bellflower Unified School District

HVAC Upgrades for (7) Schools	
Company Name	Bellflower Unified School District
Jobsite Address	16703 Clark Ave, Bellflower CA
Telephone Number	323.334.5465
Reference Name(s)	Mel Crow
Contract Amount	\$2,192,015.00
Year Completed	2022
Services Provided	HVAC Unit Replacements: Albert Baxter (15) 4-ton units, Bellflower Middle & HS (83) package units & (12) wall units, Ernie Pyle (17) package units, Washington (9) package units, Woodruff (12) package units & (9) wall units

Alhambra Unified School District

SoCal REN HVAC and EMS Retrofit	
Company Name	Alhambra Unified School District
Jobsite Address	1515 W. Mission Rd, Alhambra CA
Telephone Number	626.943.6550
Reference Name(s)	George Murray, Assistant Superintendent of Facilities & Planning
Contract Amount	\$6,127,272.00
Year Completed	2022
Services Provided	Retrofit of all HVAC equipment and controls for (6) school sites

Irvine Unified School District

Irvine Unified School District	
Company Name	Irvine Unified School District
Business Address	100 Nightmist, Irvine, CA 92618
Telephone Number	310.289.7530
Reference Name(s)	Gil Sanchez, Facilities Manager
Year Completed	In Progress (Since 2006)
Services Provided	HVAC Replacement Projects, Engineered Retrofits, Customized Preventive Maintenance, Emergency Service, Repairs

Lake Elsinore Unified School District

Lake Elsinore Unified School District	
Company Name	Lake Elsinore Unified School District
Business Address	545 Chaney St, Lake Elsinore, CA 92530
Telephone Number	951.253.7030
Reference Name(s)	Olivia Adame, Maintenance Services
Year Completed	In Progress (Since 2016)
Services Provided	HVAC Replacement Projects, Engineered Retrofits, Customized Preventive Maintenance, Emergency Service, Repairs

NOVA Academy

NOVA Academy	
Company Name	RiverRock – NOVA Academy
Business Address	500 W Santa Ana Blvd, Santa Ana, CA 92701
Telephone Number	714.689.1454
Reference Name(s)	Brianna McHenry, Portfolio Manager
Year Completed	2022 – maintenance ongoing
Services Provided	HVAC Replacement Projects, Engineered Retrofits, Customized Preventive Maintenance, Emergency Service, Repairs

(5.0) Student HVAC Internship Program

While in the planning phase of a large HVAC retrofit project with Alhambra Unified School District, we became aware that the District had students that were interested in pursuing Career Technical Education (CTE) pathways. As a result of speaking with the CTE department we learned that an internship program would expose students to our industry and could pave the way for high paying, in demand jobs.

In the summer of 2022 DTS took a major leap forward by implementing a pilot HVAC internship serving CTE students within the Alhambra Unified School District. In presenting this opportunity to Alhambra USD students the CTE staff identified a greater than expected amount of interest in this internship. Diversified interviewed and selected candidates that showed proficiency and desire to learn about the engineering, construction, and management of the mechanical equipment within their district. Here they were given the opportunity to shadow the execution of a school-wide HVAC retrofit and controls project at an elementary school in their own community.

This internship program exhibited impacts in the following areas:

- Real-world job application and interview experience
- On-the-job training
- One-on-One learning opportunities
 - Mathematics
 - Geometry
 - Science/Physics
 - OSHA Safety Practices
- Hands-on construction experience
- Economic opportunity for students
- Outstanding experience on resume
- Connection to a technical career pathway
- Development of essential employment responsibilities
- Roadmap for future CTE Partnerships

As a result of this successful partnership, DTS has set aside an investment strategy to train and employ CTE students on future public construction projects.

Please scan the QR code to view the students' reflection on their CTE Experience:



QUALITY CONTROLS & SAFETY PROTOCOLS

IN THIS SECTION:

- INSPECTION AND QUALITY CONTROL PROTOCOLS
 - ❖ COMMUNICATION PROCEDURES
 - ❖ CHANGE MANAGEMENT
 - ❖ SCHEDULE MANAGEMENT
 - ❖ DOCUMENT CONTROL & QUALITY ASSURANCE
- SAFETY

SECTION
D

(6.0) Inspection and Quality Control Protocols

(6.1) Project Management Approach

The department head, Brian Simmer, will have the overall authority and responsibility for managing and executing the desired goal of the project in accordance with the specified scope of work and program plans. They will ensure that all work is performed safely and in unity with the needs of the equipment and individual space requirements.

The project team will consist of personnel from the Construction Division. The Project Manager will work with all resources to plan, schedule, and perform the tasks outlined in this program to execute the HVAC & Controls Replacements.

(6.2) Project Communications Management Plan

This Communications Management Plan sets the communications framework to complete the required preventative maintenance and system evaluation. It will serve as a guide for communications throughout the life of the program and will be updated as communication requirements change. It also includes a communications matrix which maps the communication requirements of this project, and communication conduct for meetings and other forms of communication and documentation.

The Project Manager will take the lead role in ensuring effective communications on this project. The Communications Matrix (referenced below) will be used as the guide for what information to communicate, who is to do the communicating, when to communicate it, and to whom to communicate.

(6.2.1) Communications Matrix

Communication	Frequency	Deliverable	Owner
Project Kickoff	Upon Execution	DTS Team Meeting	Project Manager
Progress Meeting	Weekly	In Person	Project Manager
Project Review	Monthly	Email	Project Manager
Project Closeout	Upon Completion	In Person	Project Manager

(6.2.2) Project Team Directory

Name	Title	Email	Phone:
Brian Simmer	Vice President, Construction	brians@dtthermal.net	714.319.5071
Kevin Gruss	Operations Manager	keving@dtthermal.net	714.822.4953
Jim Schulz	Project Manager	jims@dtthermal.net	714.319.3691
Ryan Scribner	Project Manager	ryans@dtthermal.net	760.953.8004
Cody Kaffenberger	Project Manager	codyk@dtthermal.net	714.403.7355
Carol Tashiro	Coordinator	carolt@dtthermal.net	714.632.7401
Jeff Coyne	PM Assistant	jeffc@dtthermal.net	714.632.7401

(6.3) Change Management

It is always the primary goal and objective of the entire DTS team to identify all potential challenges or alternatives upfront prior to the commencement of any contracted service. However, in the event a need to change the scope of work should be identified, the following steps comprise Diversified Thermal Services' change control process for all projects of this magnitude.

- ❖ Identify the need for a change
- ❖ Contact the District to communicate the need
- ❖ Log change in the change request register
- ❖ Conduct an evaluation of the change
- ❖ Submit the change request to Customer
- ❖ Change Control Decision by Customer
- ❖ Implement change once approved

If a change is approved by the Department, the Project Manager will update and re-baseline the project documentation as necessary as well as ensure any changes are communicated to the team and stakeholders.

(6.4) Schedule Management Plan

A Master Schedule will be finalized and provided to District within the first 30 days of award of contract. All phases of the project will be performed per the Engineer's recommendations, Contractor's Estimates, and local governmental requirements.

(6.5) Documentation and Quality Assurance Plan

All members of the DTS team are personally responsible to uphold our best practices quality management. It is imperative that the team ensures that all work is completed with highest level of quality from individual work packages to the final project deliverable. The following are the quality roles and responsibilities for all participants in the HVAC Replacements:

The District is responsible for approving all quality standards for the service. The Customer will review all project tasks and deliverables to ensure compliance with established and approved quality standards. Additionally, the Customer will sign off on the final acceptance of work completed.

The Project Manager is responsible for quality management throughout the duration of the project. The QA/QC team will assist the Project Manager by providing an initial assessment of the equipment and by making necessary recommendations on the technical workmanship of the Diversified Thermal Services Representative.

The Project Manager is responsible for implementing the Quality Management Plan as established by the RFP to ensure all tasks, processes, and documentation are compliant with the plan. The Service Manager is also responsible for communicating and tracking all quality standards to the Department and stakeholders.

The qualified team of dedicated technicians will be responsible for assisting the Project Manager in meeting all Diversified Thermal Services quality standards.

(6.6) Risk Management Plan

The approach for managing risks for the project includes a methodical process by which the DTS team identifies and ranks the various risks. Every effort will be made to proactively identify risks ahead of time to implement a mitigation strategy from the agreement's onset. The most likely and highest impact risks were added to the service schedule to ensure that the assigned risk managers take the necessary steps to implement the mitigation response at the appropriate time during the schedule.

Upon the completion of each phase, during the closing process, the Project Manager will analyze each risk as well as the risk management process. Based on this analysis, the Project Manager will identify any improvements that can be made to the risk management process for future RFP requests. These improvements will be captured as part of the lessons learned knowledge base.

(6.7) Staffing Management Plan

The Project will consist of a matrix structure with work being performed internally and with carefully vetted subcontractors of the highest quality. Staffing requirements for the Project include the following:

Department Head (2 position) – responsible for all management for the project. The Department Head is responsible for overseeing the planning, creating, and/or managing all work activities, variances, tracking, reporting, communication, performance evaluations, staffing, and internal coordination with functional managers.

Project Managers (8 position) – responsible for oversight of all scheduling & on-site tasks, as well as ensuring all work is compliant with quality standards. Responsible for working with the Department Head to create work packages, manage risk, manage schedule, identify requirements, and create reports. Will coordinate with Field Technicians to receive all site reports with identified follow up. Managers will review and compile the necessary repairs/corrective actions and propose to the Client.

Field Technicians (67 positions) – responsible for the on-site implementation of all HVAC Preventative Maintenance and System Evaluation Project procedures. Additional responsibilities include working with the Service Manager to ensure all facets of the project are executed successfully.

(7.0) Safety Implementation

The personal safety and health of each employee of this company is of primary importance. Prevention of occupationally induced injuries and illnesses is of such consequence that it will be given precedence over operating productivity whenever necessary. To the greatest degree possible, management will provide all necessary training for physical activities and the appropriate Personal Protective Equipment (PPE) required for personal safety and health, in keeping with the highest standards. This will be accomplished through employee orientation and ongoing training, hazard evaluations, written codes of safe practice, monthly inspections, monthly office meetings, annual drills, and scheduled audits. Employee input is essential to this program and will be the catalyst for future improvements and employee interest.

Key Areas of Focus	Safety Culture & Ideals	Safety Protocol Implementation
Leadership	Provide transparency of expectations & seek safety 1st	Create active IIPP & Confirm that program flows down
Safety Management Programs	Continuous Improvements from evidence-based studies	Pre-job safety walks and audits to prevent unsafe potentials
Employee Engagement	Active tailgate meetings & OSHA recertifications	Responsibility to abide by safety measures & report hazards
Safety Measures	Participate in Risk Mitigation	Safety education tailored to site specific hazards & evolving risks

(7.1) Workplace & Jobsite Safety

Diversified Thermal Services, Inc. has continuously refined our safety program since 1996, based on field experience and constant updates driven the applicable regulations. Our company has been fortunate to have experienced injury rates well below the industry average, this was not accidental but the direct result of a well written and properly implemented program. Unfortunately, our industry has the potential to expose our workforce and our clients to a very diverse mix of potential hazards. DTS commitment to identifying all potential sources of injury or illness is the cornerstone of our success. We then apply the simple but tried and true threat, risk, and vulnerability assessment to focus our safety practices where the danger lies. Our safety programs comply with both the federal and the state regulations for both the public and private sectors.

As with all new sites or major projects, our safety programs are designed as much to spot potential security and safety threats as they are to develop a common operating picture with mutual terminology. This framework is not only the basis for preventing incidents but recognizing, alerting, isolating, and properly notifying all affected and concerned parties.

This is accomplished in part through the overall structure of our program. Starting with our basic IIPP, as both the foundation for all our tasks and drills and as an umbrella over our more specific programs. Our foundation is in our General Safety Rules, Policy Statements and Codes of Safe Practice. Our Personal Protective Equipment, Hearing Loss Prevention, Hazard Communication, Electrical Safety Orders, and Fall Protection Programs all are under the IIPP umbrella intentionally designed to work together but focus select operators, when performing certain tasks towards these greater hazards. Through our training and education, we teach the principles of safety and protection, enabling the workforce to recognize and properly isolate themselves from every hazard, thus safely performing their duties.

Our IIPP program covers site surveys and job safety analysis designed to keep everyone safe but not stop necessary work or essential functions, as these stoppages can have injurious consequences of their own.

All technicians and subcontractors arriving at the job site have been trained in DTS's Personal Protective Equipment (PPE) Policy and commit to upholding the safety of the environment around them by wearing all minimum PPE (hard hat, cut resistant gloves, safety glasses, work boots), as well as task-specific PPE requirements.

DTS Project Manager(s) will perform a Job Hazard Analysis (JHA) prior to kick-off of onsite labor. JHA will accompany any site specific SDS to account for materials used during specified scope of work.

Weekly jobsite tailgate meeting, duty-specific training, and monthly safety reviews are conducted by Diversified Thermal Services Safety Team to ensure the care of the technicians and Customer. Per OSHA guidelines, safety audits are conducted to validate safety program execution.

(7.2) COVID-19 & Infectious Disease Control

Diversified Thermal Services, Inc. has provided services to medical care providers and the medical services industry in general for decades. As a result, illness prevention has been a part of our safety plan and developed alongside our injury prevention protocol. First driven by bloodborne pathogen protections in the 1990's, then refining for vector borne disease due to West Nile Virus in 2004, and finally for Aerosolized Transmissible Disease (ATD) due to SARS in 2008, our disease prevention program has been very robust for over a decade. SARS-Covid-19 has been a tragedy which has touched too many lives; however, we firmly believe that our disease prevention plan, specifically our Covid Pandemic Response Plan, is a simple adaptation of our existing Play Book focused on ATD and complying with all the updates

to Title 8 Section 5199 since 2008. Our specifically modified Codes of Safe Practice are tailored to maximize prevention not only for our own personnel, but for our client's sites and workforce as well. This shared responsibility and respect approach brings simple to follow information and instructions, while maintaining dignity and personal productivity. We were able to roll out our Covid-19 Plan on March 20, 2020 and keep updating per CDC and State of California Guidelines. Our program's author has over 35 years in protecting first responders, especially medical teams from illness or injury in disaster response. These valuable lessons learned have been written into our plans. We do not know how much longer this pandemic will last, but we do know that our plan has the flexibility to scale up or ramp down, based on health department guidelines. We look forward to working together in protecting all we impact from this terrible disease.

REQUIRED BID FORMS

IN THIS SECTION:

- DESIGNATION OF SUBCONTRACTORS
- BID FORM
- CONTRACTOR'S CERTIFICATE REGARDING WORKERS COMPENSATION
- NON-COLLUSION DECLARATION
- BID BOND
- SUBSTITUTION REQUEST FORM
- ACKNOWLEDGEMENT OF BIDDING PRACTICES REGARDING INDEMNITY
- DBVE PARTICIPATION STATEMENT
- CONTRACTOR'S CERTIFICATE REGARDING DRUG-FREE WORKPLACE
- CONTRACTOR'S CERTIFICATE REGARDING ALCOHOLIC BEVERAGE AND TOBACCO-FREE CAMPUS POLICY

SECTION
E

(8.0) Required Bid Submission Documents

See below attached required bid documents



DESIGNATION OF SUBCONTRACTORS

In compliance with the Subletting and Subcontracting Fair Practices Act (California Public Contract Code section 4100 et seq.) and any amendments thereof, each Bidder shall set forth below: (a) the name, license number, and location of the place of business of each subcontractor who will perform work or labor or render service to the Contractor, who will perform work or labor or work or improvement to be performed under this Contract, or a subcontractor licensed by the State of California who, under subcontract to the Contractor, specially fabricates and installs a portion of the work or improvements according to detailed Drawings contained in the Plans and Specifications in an amount in excess of one-half of one percent of the Contractor's total bid; and (b) the portion and description of the work which will be done by each subcontractor under this Act. The Contractor shall list only one subcontractor for each such portion as is defined by the Contractor in this bid. All subcontractors shall be properly licensed by the California State Licensing Board.

If a Contractor fails to specify a subcontractor, or if a Contractor specifies more than one subcontractor for the same portion of work to be performed under the Contract in excess of one-half of one percent of the Contractor's total bid, the Contractor shall be deemed to have agreed that the Contractor is fully qualified to perform that portion, and that the Contractor alone shall perform that portion.

No Contractor whose bid is accepted shall (a) substitute any subcontractor, (b) permit any subcontractor to be voluntarily assigned or transferred or allow the relevant portion of the work to be performed by anyone other than the original subcontractor listed in the original bid, or (c) sublet or subcontract any portion of the work in excess of one-half of one percent of the Contractor's total bid where the original bid did not designate a subcontractor, except as authorized in the Subletting and Subcontracting Fair Practices Act.

Subletting or subcontracting of any portion of the work in excess of one-half of one percent of the Contractor's total bid where no subcontractor was designated in the original bid shall only be permitted in cases of public emergency or necessity, and then only after a finding, reduced to writing as a public record, of the authority awarding this Contract setting forth the facts constituting the emergency or necessity.

All subcontractors (of any tier) performing any portion of the Work must comply with the Labor Code sections 1725.5 and 1771.1 and must be properly and currently registered with the California Department of Industrial Relations and qualified to perform public works pursuant to Labor Code section 1725.5 throughout the duration of the Project.

NOTE: If alternate bids are called for and bidder intends to use different or additional subcontractors on the alternates, a separate list of subcontractors must be provided for each such Alternate.



DESIGNATION OF SUBCONTRACTORS FORM

Description & Portion of Work	Name of Subcontractor	Location & Place of Business	License Type and Number	E-Mail & Telephone*	DIR Registration Number*
Crane Lift	Crane Rental Service	1901 W. Collins Ave Orange, CA 92867	"A" #314618	(714) 412-4931 pet@cranerentalservice.com	1000009341
Air Balance	Air Management Industries, Inc.	8351 Elm Ave, Suite 102 Rancho Cucamonga, CA 91730	"C20, C61/D62, C61/D84" # 783245	(909) 945-0041	1000000491
Engineering	Advanced Engineering Solutions	3532 Katella Ave, Ste. 203 Los Alamitos, CA 90720	N/A - MEP	(714) 625-8325 mwhilton@aas_consultants.com	N/A - MEP



Description & Portion of Work	Name of Subcontractor	Location & Place of Business	License Type and Number	E-Mail & Telephone*	DIR Registration Number*

* This information must be provided at the time of submission of bid or must be provided within 24 hours after the time set for the opening of bids. Bidders who choose to provide this information within 24 hours after the time set for the opening of bids are solely responsible to ensure the District receives this information in a timely manner. The District is not responsible for any problems or delays associated with emails, faxes, delivery, etc. Absent a verified fax or email receipt date and time by the District, the District's determination of whether the information was received timely shall govern and be determinative. Bidder shall not revise or amend any other information in this form submitted at the time of bid. The information submitted at the time of bid shall govern over any conflicts, discrepancies, ambiguities or other differences in any subsequent Subcontractor Designation Forms submitted by the bidder.

Proper Name of Bidder: Diversified Thermal Services

Date: 02/16/2023

Name: Robert Lowman & Rey Agustin

Signature of Bidder

Representative:

Address: 1220 N. Barsten Way, Anaheim CA 92806

Phone: (714) 632-7401



BID FORM

FOR

ROOF HVAC REPLACEMENT PROJECT

LOMA ALTA ES 3544 North Canon Blvd. Altadena, CA 91001

WEBSTER ES 2101 E Washington Blvd Pasadena, CA 91104

NORMA COOMBS ES 2600 Paloma St Pasadena, CA 91107

DON BENITO ES 743 E. Calaveras St Altadena, CA 91001

PASADENA HS 2925 E Sierra Madre Blvd Pasadena, CA 91107

Bid No. 05-22/23

FOR

PASADENA UNIFIED SCHOOL DISTRICT

**CONTRACTOR
NAME:**

Diversified Thermal Services

ADDRESS:

1220 N. Barsten Way

Anaheim, CA 92660

TELEPHONE:

(714) 632-7401

EMAIL

robertl@dthermal.net, reya@dthermal.net



TO: Pasadena Unified School District, acting by and through its Governing Board, herein called "District".

1. Pursuant to and in compliance with your Notice Inviting Bids and other documents relating thereto, the undersigned bidder, having familiarized himself with the terms of the Contract, the local conditions affecting the performance of the Contract, the cost of the work at the place where the work is to be done, with the Drawings and Specifications, and other Contract Documents, hereby proposes and agrees to perform within the time stipulated, the Contract, including all of its component parts, and everything required to be performed, including its acceptance by the District, and to provide and furnish any and all labor, materials, tools, expendable equipment, and utility and transportation services necessary to perform the Contract and complete all of the Work in a workmanlike manner required in connection with the construction of:

BID NO. 05-22/23

ROOF HVAC REPLACEMENT PROJECT

in the District described above, all in strict conformance with the drawings and other Contract Documents on file at PlanetBids of said District for amounts set forth herein.

2. BIDDER ACKNOWLEDGES THE FOLLOWING ADDENDUM:

Number	Number	Number	Number	Number	Number	Number	Number
1	2						

Acknowledge the inclusion of all addenda issued prior to bid in the blanks provided above. Your failure to do so may render your bid non-responsive.

3. Bid Response by School and Total including Allowance in Words and Numerical Amount

a. Loma Alta ES

ONE HUNDRED SEVENTY THREE THOUSAND SIX HUNDRED NINETY FOUR DOLLARS

(\$ 173,694.00)

b. Webster ES

SEVEN HUNDRED FIFTY SEVEN THOUSAND ONE HUNDRED FOURTEEN DOLLARS

(\$ \$757,114.00)



c. Norma Coombs ES

ONE HUNDRED NINE THOUSAND FOUR HUNDRED EIGHT DOLLARS

(\$ \$109,408.00)

d. Don Benito ES

FORTY ONE THOUSAND FOUR HUNDRED NINETY FIVE DOLLARS

(\$ \$41,495.00)

e. Pasadena HS

EIGHTY TWO THOUSAND EIGHT HUNDRED FIFTY DOLLARS

(\$ \$82,850.00)

f. Allowance

Two Hundred Thousand DOLLARS

(\$ 200,000)

TOTAL CASH PURCHASE PRICE IN WORDS & NUMBERS:

(Total of items a, b, c, d, e, f above)

ONE MILLION THREE HUNDRED SIXTY FOUR THOUSAND FIVE HUNDRED SIXTY ONE DOLLARS

(\$ \$1,364,561.00)

4. Allowances: Allowances as set forth below are to be used as compensation for items as set forth by the District. The amounts listed are to be included in the base bid and shall be listed separately.

Allowance No. 1: Two Hundred Thousand Dollars (\$200,000)

5. TIME FOR COMPLETION: The District may give a notice to proceed within ninety (90) days of the award of the bid by the District. Once the Contractor has received the notice to proceed, the Contractor shall complete the work in the time specified in the Agreement. By submitting this bid, Contractor has thoroughly studied this Project and agrees that the Contract Time for this Project is adequate for the timely and proper completion of the Project. Further, Contractor has included in the analysis of the time required for this Project, Rain Days, Governmental Delays, and the requisite time to complete Punch List.



In the event that the District desires to postpone giving the notice to proceed beyond this ninety (90) day period, it is expressly understood that with reasonable notice to the Contractor, giving the notice to proceed may be postponed by the District. It is further expressly understood by the Contractor, that the Contractor shall not be entitled to any claim of additional compensation as a result of the postponement of giving the notice to proceed.

If the Contractor believes that a postponement will cause a hardship to it, the Contractor may terminate the contract with written notice to the District within ten (10) days after receipt by the Contractor of the District's notice of postponement. Should the Contractor terminate the Contract as a result of a notice of postponement, the District shall have the authority to award the Contract to the next lowest responsible bidder, if applicable.

It is understood that the District reserves the right to reject any or all bids and/or waive any irregularities or informalities in this bid or in the bid process. The Contractor understands that it may not withdraw this bid for a period of ninety (90) days after the date set for the opening of bids.

6. Attached is bid security in the amount of not less than ten percent (10%) of the bid:

Bid bond (10% of the Bid), certified check, or cashier's check (circle one)

7. The required List of Designated Subcontractors is attached hereto.

8. The required Non-Collusion Declaration is attached hereto.

9. The Substitution Request Form, if applicable, is attached hereto.

10. It is understood and agreed that if written notice of the acceptance of this bid is mailed, telegraphed, or delivered to the undersigned after the opening of the bid, and within the time this bid is required to remain open, or at any time thereafter before this bid is withdrawn, the undersigned will execute and deliver to the District a Contract in the form attached hereto in accordance with the bid as accepted, and that he or she will also furnish and deliver to the District the Performance Bond and Payment Bond, all within five (5) calendar days after award of Contract, and that the work under the Contract shall be commenced by the undersigned bidder, if awarded the Contract, by the start date provided in the District's Notice to Proceed, and shall be completed by the Contractor in the time specified in the Contract Documents.

11. The names of all persons interested in the foregoing proposal as principals are as follows:

Craig Steinmetz, President & CEO

Steven Steinmetz, CFO

(IMPORTANT NOTICE: If bidder or other interested person is a corporation, state the legal name of such corporation, as well as the names of the president, secretary, treasurer, and manager thereof; if a co-



partnership, state the true names of the firm, as well as the names of all individual co-partners comprising the firm; if bidder or other interested person is an individual, state the first and last names in full.)

12. **PROTEST PROCEDURES.** If there is a bid protest, the grounds shall be submitted as set forth in the Instructions to Bidders.

13. The undersigned bidder shall be licensed and shall provide the following California Contractor's license information:

License Number: 609967
License Expiration Date: 02/28/2025
Name on License: Diversified Thermal Services
Class of License: B, C10, C20, C38
DIR Registration Number: 1000001071

If the bidder is a joint venture, each member of the joint venture must include the above information.

14. Time is of the essence regarding this Contract, therefore, in the event the bidder to whom the Contract is awarded fails or refuses to post the required bonds and return executed copies of the Agreement form within five (5) calendar days from the date of receiving the Notice of Award, the District may declare the bidder's bid deposit or bond forfeited as damages.

15. The bidder declares that he/she has carefully examined the location of the proposed Project, that he/she has examined the Contract Documents, including the Plans, General Conditions, Supplemental Conditions, Addenda, and Specifications, all others documents and requirements that are attached to and/or contained in the Project Manual, all other documents issued to bidders and read the accompanying instructions to bidders, and hereby proposes and agrees, if this proposal is accepted, to furnish all materials and do all work required to complete the said work in accordance with the Contract Documents, in the time and manner therein prescribed for the unit cost and lump sum amounts set forth in this Bid Form.

16. **DEBARMENT.** In addition to seeking remedies for False Claims under Government Code section 12650 et seq. and Penal Code section 72, the District may debar a Contractor pursuant to Article 15 of the General Conditions if the Board, or the Board may designate a hearing officer who, in his or her discretion, finds the Contractor has done any of the following:

- a. Intentionally or with reckless disregard, violated any term of a contract with the District;
- b. Committed an act or omission which reflects on the Contractor's quality, fitness or capacity to perform work for the District;
- c. Committed an act or offense which indicates a lack of business integrity or business honesty; or



d. Made or submitted a false claim against the District or any other public entity. (See Government Code section 12650, et seq., and Penal Code section 72)

17. DESIGNATION OF SUBCONTRACTORS. In compliance with the Subletting and Subcontracting Fair Practices Act (California Public Contract Code section 4100 et seq.) and any amendments thereof, each bidder shall list subcontractors on the District's form Subcontractor list. This subcontractor list shall be submitted with the bid and is a required form

I agree to receive service of notices at the e-mail address listed below.

I the below-indicated bidder, declare under penalty of perjury that the information provided and representations made in this bid are true and correct.

Diversified Thermal Services

Proper Name of Company

Robert Lowman & Rey Agustin

Name of Bidder Representative

1220 N. Barsten Way

Street Address

Anaheim, CA 92660

City, State, and Zip

(714) 632-7401

Phone Number

robertl@dthermal.net, reya@dthermal.net

E-Mail

By:


Signature of Bidder Representative

Date: 02/16/2023

NOTE: If bidder is a corporation, the legal name of the corporation shall be set forth above together with the signature of authorized officers or agents and the document shall bear the corporate seal; if bidder is a partnership, the true name of the firm shall be set forth above, together with the signature of the partner or partners authorized to sign contracts on behalf of the partnership; and if bidder is an individual, his signature shall be placed above.

All signatures must be made in permanent blue ink.



CONTRACTOR'S CERTIFICATE REGARDING WORKERS' COMPENSATION
FORM

Labor Code section 3700 in relevant part provides:

Every employer except the State shall secure the payment of compensation in one or more of the following ways:

1. By being insured against liability to pay compensation by one or more insurers duly authorized to write compensation insurance in this State.
2. By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to employees.
3. For any county, city, city and county, municipal corporation, public district, public agency, or any political subdivision of the state, including each member of a pooling arrangement under a joint exercise of powers agreement (but not the state itself), by securing from the Director of Industrial Relations a certificate of consent to self-insure against workers' compensation claims, which certificate may be given upon furnishing proof satisfactory to the director of ability to administer workers' compensation claims properly, and to pay workers' compensation claims that may become due to its employees. On or before March 31, 1979, a political subdivision of the state which, on December 31, 1978, was uninsured for its liability to pay compensation, shall file a properly completed and executed application for a certificate of consent to self-insure against workers' compensation claims. The certificate shall be issued and be subject to the provisions of Section 3702.

I am aware of the provisions of Labor Code section 3700 which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provision before commencing the performance of the work of this Contract.

(Signature)

Rey Agustin

(Print)

02/16/2023

(Date)

In accordance with Article 5 (commencing at section 1860), Chapter 1, Part 7, Division 2 of the Labor Code, the above certificate must be signed and submitted with the Contractor's bid.



NON-COLLUSION DECLARATION

The undersigned declares:

I am the President & CEO [Title] of Diversified Thermal Services [Name of Company], the party making the foregoing bid.

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

Any person executing this declaration on behalf of a bidder 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 bidder.

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 02/15/2023 [Date], at Anaheim [City], CA [State].

Signed:

Typed Name: Craig J. Steinmetz



BID BOND FORM

KNOW ALL MEN BY THESE PRESENT that we, the undersigned, (hereafter called "Principal"), and Harco National Insurance Company (hereafter called "Surety"), are hereby held and firmly bound unto the Pasadena Unified School District (hereafter called "District") in the sum of Ten Percent of the Amount Bid (\$10% of Amt. Bid) for the payment of which, well and truly to be made, we hereby jointly and severally bind ourselves, successors, and assigns.

SIGNED this 14th day of February, 2023.

The condition of the above obligation is such that whereas the Principal has submitted to the District a certain Bid, attached hereto and hereby made a part hereof, to enter into a Contract in writing for the construction of Roof HVAC Replacement Project, Bid No. 05-22/23 - Loma Alta ES, Webster ES, Norma Combs ES, Don Benito ES, Pasadena HS

NOW, THEREFORE,

- a. If said Bid is rejected, or
- b. If said Bid is accepted and the Principal executes and delivers a Contract or the attached Agreement form within five (5) calendar days after acceptance (properly completed in accordance with said Bid), and furnishes bonds for his faithful performance of said Contract and for payment of all persons performing labor or furnishing materials in connection therewith,

Then this obligation shall be void; otherwise, the same shall remain in force and effect.

Surety, for value received, hereby stipulates and agrees that no change, extension of time, alteration, or addition to the terms of the Contract, or the call for bids, or the work to be performed thereunder, or the specifications accompanying the same, shall in anyway affect its obligation under this bond, and it does hereby waive notice of any such change, extension of time, alteration, or addition to the terms of said Contract, or the call for bids, or the work, or to the specifications.

In the event suit is brought upon this bond by the District and judgment is recovered, the Surety shall pay all costs incurred by the District in such suit, including without limitation, attorneys' fees to be fixed by the court.



IN WITNESS WHEREOF, Principal and Surety have hereunto set their hands and seals, and such of them as are corporations have caused their corporate seals to be hereto affixed and these presents to be signed by their proper officers, on the day and year first set forth above.

(Corporate Seal)

By 
Diversified Thermal Services, LLC
1220 N. Barsten Way, Anaheim, CA 92806

Principal's Signature

Typed or Printed Name

Principal's Title

(Corporate Seal)

By 
Surety's Signature
Rebecca S. Leal

Typed or Printed Name

Attorney-in-Fact

Title

Harco National Insurance Company

Surety's Name

4200 Six Forks Road, Suite 1400, Raleigh, NC 27609

Surety's Address

(919) 833-1600

Surety's Phone Number

(Attached Attorney in Fact Certificate)



IMPORTANT:

Surety companies executing bonds must possess a certificate of authority from the California Insurance Commissioner authorizing them to write surety insurance defined in California Insurance Code section 105, and if the work or project is financed, in whole or in part, with federal, grant, or loan funds, it must also appear on the Treasury Department's most current list (Circular 570 as amended).

THIS IS A REQUIRED FORM.

Any claims under this bond may be addressed to:

(Name and Address of Surety)

George Rettig

IAT Surety

One Newark Center, 20th Floor, Newark, NJ 07102

(Name and Address of agent or representative for
service of process in California if different from above)

Charles R. Teter

Lockton Insurance Brokers

777 S. Figueroa, 52nd Floor, Los Angeles, CA 90017

(Telephone Number of Surety and agent or
representative for service of process in California).

Surety Phone: (973) 776-8773

Agent Phone: (213) 689-0500

CALIFORNIA ALL-PURPOSE ACKNOWLEDGMENT

CIVIL CODE § 1189

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of CALIFORNIA
 County of ORANGE
 On FEBRUARY 15TH 2023 before me, CAROLYN TASHIRO
 Date Here Insert Name and Title of the Officer
 Personally appeared CRAIG J STEINMETZ
 Name(s) of Signer(s)

who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.



Signature [Handwritten Signature]
 Signature of Notary Public

Place Notary Seal Above

OPTIONAL

Though this section is optional, completing this information can deter alteration of the document or fraudulent reattachment of this form to an unintended document.

Description of Attached Document

Title or Type of Document Bid Bond Document Date FEBRUARY 15, 2023
 Number of Pages 1 Signer(s) Other Than Named Above

Capacity(ies) Claimed by Signer(s)

Signer's Name <input checked="" type="checkbox"/> Corporate Officer—Title(s) <input type="checkbox"/> Partner <input type="checkbox"/> Limited <input type="checkbox"/> General <input type="checkbox"/> Individual <input type="checkbox"/> Attorney in Fact <input type="checkbox"/> Trustee <input type="checkbox"/> Guardian or Conservator <input type="checkbox"/> Other	Signer's Name <input type="checkbox"/> Corporate Officer—Title(s) <input type="checkbox"/> Partner <input type="checkbox"/> Limited <input type="checkbox"/> General <input type="checkbox"/> Individual <input type="checkbox"/> Attorney in Fact <input type="checkbox"/> Trustee <input type="checkbox"/> Guardian or Conservator <input type="checkbox"/> Other
Signer Is Representing	Signer Is Representing

CALIFORNIA ALL-PURPOSE ACKNOWLEDGMENT

CIVIL CODE § 1189

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of Missouri

County of Jackson

On February 14, 2023 before me, Tahitia M. Fry, Notary Public
Date Here Insert Name and Title of the Officer

Personally appeared Rebecca S. Leal
Name(s) of Signer(s)

who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

TAHITIA M. FRY
 NOTARY PUBLIC-NOTARY SEAL
 STATE OF MISSOURI
 JACKSON COUNTY
 MY COMMISSION EXPIRES 2/15/2024
 COMMISSION # 12303541

I certify under PENALTY OF PERJURY under the laws of the State of Missouri that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature [Signature]
Signature of Notary Public

Place Notary Seal Above

OPTIONAL

Though this section is optional, completing this information can deter alteration of the document or fraudulent reattachment of this form to an unintended document.

Description of Attached Document

Title or Type of Document _____ Document Date _____

Number of Pages _____ Signer(s) Other Than Name(s) Above _____

Capacity(ies) Claimed by Signer(s)

Signer's Name _____
☐ Corporate Officer—Title(s) _____
☐ Partner ☐ Limited ☐ General
☐ Individual ☐ Attorney in Fact
☐ Trustee ☐ Guardian or Conservator
☐ Other _____

Signer Is Representing _____

Signer's Name _____
☐ Corporate Officer—Title(s) _____
☐ Partner ☐ Limited ☐ General
☐ Individual ☐ Attorney in Fact
☐ Trustee ☐ Guardian or Conservator
☐ Other _____

Signer Is Representing _____

Bond # N/A

POWER OF ATTORNEY
HARCO NATIONAL INSURANCE COMPANY
INTERNATIONAL FIDELITY INSURANCE COMPANY
Member companies of IAT Insurance Group, Headquartered: 4200 Six Forks Rd, Suite 1400, Raleigh, NC 27609

KNOW ALL MEN BY THESE PRESENTS: That **HARCO NATIONAL INSURANCE COMPANY**, a corporation organized and existing under the laws of the State of Illinois, and **INTERNATIONAL FIDELITY INSURANCE COMPANY**, a corporation organized and existing under the laws of the State of New Jersey, and having their principal offices located respectively in the cities of Rolling Meadows, Illinois and Newark, New Jersey, do hereby constitute and appoint

EVAN D. SIZEMORE, CHARISSA D. LECUYER, REBECCA S. LEAL, TAHITIA M. FRY, C. STEPHENS GRIGGS, LAUREN SCOTT, HILLARY D. SHEPARD, KELLIE A. MEYER, ERIN C. LAVIN, CHARLES R. TETER III, VERONICA LAWVER, MARY T. FLANIGAN, PATRICK T. PRIBYL, CHRISTY M. BRAILE, JEFFREY C. CAREY, DEBRA J. SCARBOROUGH
Kansas City, MO

their true and lawful attorney(s)-in-fact to execute, seal and deliver for and on its behalf as surety, any and all bonds and undertakings, contracts of indemnity and other writings obligatory in the nature thereof, which are or may be allowed, required or permitted by law, statute, rule, regulation, contract or otherwise, and the execution of such instrument(s) in pursuance of these presents, shall be as binding upon the said **HARCO NATIONAL INSURANCE COMPANY** and **INTERNATIONAL FIDELITY INSURANCE COMPANY**, as fully and amply, to all intents and purposes, as if the same had been duly executed and acknowledged by their regularly elected officers at their principal offices.

This Power of Attorney is executed, and may be revoked, pursuant to and by authority of the By-Laws of **HARCO NATIONAL INSURANCE COMPANY** and **INTERNATIONAL FIDELITY INSURANCE COMPANY** and is granted under and by authority of the following resolution adopted by the Board of Directors of **INTERNATIONAL FIDELITY INSURANCE COMPANY** at a meeting duly held on the 13th day of December, 2018 and by the Board of Directors of **HARCO NATIONAL INSURANCE COMPANY** at a meeting held on the 13th day of December, 2018.

"RESOLVED, that (1) the Chief Executive Officer, President, Executive Vice President, Senior Vice President, Vice President, or Secretary of the Corporation shall have the power to appoint, and to revoke the appointments of, Attorneys-in-Fact or agents with power and authority as defined or limited in their respective powers of attorney, and to execute on behalf of the Corporation and affix the Corporation's seal thereto, bonds, undertakings, recognizances, contracts of indemnity and other written obligations in the nature thereof or related thereto; and (2) any such Officers of the Corporation may appoint and revoke the appointments of joint-control custodians, agents for acceptance of process, and Attorneys-in-fact with authority to execute waivers and consents on behalf of the Corporation; and (3) the signature of any such Officer of the Corporation and the Corporation's seal may be affixed by facsimile to any power of attorney or certification given for the execution of any bond, undertaking, recognizance, contract of indemnity or other written obligation in the nature thereof or related thereto, such signature and seals when so used whether heretofore or hereafter, being hereby adopted by the Corporation as the original signature of such officer and the original seal of the Corporation, to be valid and binding upon the Corporation with the same force and effect as though manually affixed."

IN WITNESS WHEREOF, **HARCO NATIONAL INSURANCE COMPANY** and **INTERNATIONAL FIDELITY INSURANCE COMPANY** have each executed and attested these presents
on this 31st day of December, 2021



STATE OF NEW JERSEY
County of Essex

Kenneth Chapman
Executive Vice President, Harco National Insurance Company
and International Fidelity Insurance Company

STATE OF ILLINOIS
County of Cook



On this 31st day of December, 2021, before me came the individual who executed the preceding instrument, to me personally known, and, being by me duly sworn, said he is the therein described and authorized officer of **HARCO NATIONAL INSURANCE COMPANY** and **INTERNATIONAL FIDELITY INSURANCE COMPANY**; that the seals affixed to said instrument are the Corporate Seals of said Companies; that the said Corporate Seals and his signature were duly affixed by order of the Boards of Directors of said Companies.



IN TESTIMONY WHEREOF, I have hereunto set my hand affixed my Official Seal, at the City of Newark, New Jersey the day and year first above written.

Shirelle A. Outley a Notary Public of New Jersey
My Commission Expires April 4, 2023

CERTIFICATION

I, the undersigned officer of **HARCO NATIONAL INSURANCE COMPANY** and **INTERNATIONAL FIDELITY INSURANCE COMPANY**, do hereby certify that I have compared the foregoing copy of the Power of Attorney and affidavit, and the copy of the Sections of the By-Laws of said Companies as set forth in said Power of Attorney, with the originals on file in the home office of said companies, and that the same are correct transcripts thereof, and of the whole of the said originals, and that the said Power of Attorney has not been revoked and is now in full force and effect.

IN TESTIMONY WHEREOF, I have hereunto set my hand on this day February 14, 2023



Irene Marlins, Assistant Secretary

Nº 6046

STATE OF CALIFORNIA
DEPARTMENT OF INSURANCE
SAN FRANCISCO

Amended

Certificate of Authority

THIS IS TO CERTIFY, That, pursuant to the Insurance Code of the State of California,

Harco National Insurance Company

of Rolling Meadows, Illinois, organized under the
laws of Illinois, subject to its Articles of Incorporation or
other fundamental organizational documents, is hereby authorized to transact within this State,
subject to all provisions of this Certificate, the following classes of insurance: Fire, Marine,
Surety, Plate Glass, Liability, Workers' Compensation, Common Carrier
Liability, Boiler and Machinery, Burglary, Credit, Sprinkler, Team and
Vehicle, Automobile, Aircraft, and Miscellaneous
as such classes are now or may hereafter be defined in the Insurance Laws of the State of California.

THIS CERTIFICATE is expressly conditioned upon the holder hereof now and hereafter being in
full compliance with all, and not in violation of any, of the applicable laws and lawful requirements
made under authority of the laws of the State of California as long as such laws or requirements are
in effect and applicable, and as such laws and requirements now are, or may hereafter be changed
or amended.

IN WITNESS WHEREOF, effective as of the 31st day
of December, 19 94, I have hereunto set
my hand and caused my official seal to be affixed this 3rd day
of January, 19 95.



By

John Garand
Insurance Commissioner
Victoria S. Sidbury
Deputy

NOTICE

Qualification with the Secretary of State must be accomplished as required by the California Corporations Code promptly after issuance of this Certificate of Authority. Failure to do so will be a violation of Ins. Code Sec. 701 and will be grounds for revoking this Certificate of Authority pursuant to the covenants made in the application therefor and the conditions contained herein.



REQUEST FOR SUBSTITUTION AT TIME OF BID

Pursuant to Public Contract Code section 3400, bidder submits the following request to Substitute with the bid that is submitted. I understand that if the request to substitute is not "an/or equal" or is not accepted by District and I answer "no" I will not provide the specified item, then I will be held non-responsive and my bid will be rejected. With this understanding, I hereby request Substitution of the following articles, devices, equipment, products, materials, fixtures, patented processes, forms, methods, or types of construction:

	Specification Section	Specified Item	Requested Substituted Item	Contractor Agrees to Provide Specified Item if request to Substitute is Denied ¹ (circle one)	District Decision (circle one)
1.	N/A	N/A	N/A	Yes No	Grant Deny
2.				Yes No	Grant Deny
3.				Yes No	Grant Deny
4.				Yes No	Grant Deny
5.				Yes No	Grant Deny
6.				Yes No	Grant Deny
7.				Yes No	Grant Deny
8.				Yes No	Grant Deny
9.				Yes No	Grant Deny
10.				Yes No	Grant Deny
11.				Yes No	Grant Deny
12.				Yes No	Grant Deny

This Request Form must be accompanied by evidence as to whether the proposed Substitution (1) is equal in quality, service, and ability to the Specified Item; (2) will entail no change in detail, construction, and scheduling of related work; (3) will be acceptable in consideration of the required design and artistic

¹ Bidder must state whether bidder will provide the Specified Item in the event the Substitution request is evaluate and denied. If bidder states that bidder will not provide the Specified Item the denial of a request to Substitute shall result in the rejection of the bidder as non-responsive. However, if bidder states that bidder will provide the Specified Item in the event that bidder's request for Substitution is denied, bidder shall execute the Agreement and provide the Specified Item(s). If bidder refuses to execute the Agreement due to the District's decision to require the Specified Item(s) at no additional cost, bidder's Bid Bond shall be forfeited.



effect; (4) will provide no cost disadvantage to the District; (5) will require no excessive or more expensive maintenance, including adequacy and availability of replacement parts; (6) will require no change of the construction schedule or milestones for the Project; and, (7) Contractor agrees to pay for any DSA Fees or other Governmental Plan check costs associated with this Substitution Request. (See General Conditions Section 3.6)

The undersigned states that the following paragraphs are correct:

1. The proposed Substitution does not affect the dimensions shown on the Drawings.
2. The undersigned will pay for changes to the building design, including Architect, engineering, or other consultant design, detailing, DSA plan check or other governmental plan check costs, and construction costs caused by the requested substitution.
3. The proposed substitution will have no adverse effect on other trades, the Contract Time, or specified warranty requirements.
4. Maintenance and service parts will be available locally for the proposed substitution.
5. In order for the Architect to properly review the substitution request, within five (5) days following the opening of bids, the Contractor shall provide samples, test criteria, manufacturer information, and any other documents requested by Architect or Architect's engineers or consultants, including the submissions that would ordinarily be required under Article 3.7 for Shop Drawings along with a document which provides a side by side comparison of key characteristics and performance criteria (often known as a CSI side by side comparison chart).
6. If Substitution Request is accepted by the District, Contractor is still required to provide a Submittal for the substituted item pursuant to Article 3.7 and shall provide required Schedule information (including schedule fragments, if applicable) for the substituted item as required under Article 8.3.2.1. The approval of the Architect, Engineer, or District of the substitution request does not mean that the Contractor is relieved of Contractor's responsibilities for Submittals, Shop Drawings, and schedules under Article 3.7 and 8.3.2 if the Contractor is awarded the Project.

Name of Bidder: Diversified Thermal Services

By: 

District: _____

By: _____



ACKNOWLEDGMENT OF BIDDING PRACTICES REGARDING INDEMNITY FORM

TO: Pasadena Unified School District

RE: Project Number 05-22/23

Construction Contract for Roof HVAC Replacement Project

Please be advised that with respect to the above-referenced Project the undersigned Contractor on behalf of itself and all subcontractors hereby waives the benefits and protection of Labor Code section 3864, which provides:

“If an action as provided in this chapter is prosecuted by the employee, the employer, or both jointly against the third person results in judgment against such third person, the employer shall have no liability to reimburse or hold such third person harmless on such judgment or settlement in the absence of a written agreement to do so executed prior to the injury.”

This Agreement has been signed by an authorized representative of the contracting party and shall be binding upon its successors and assignees. The undersigned further agrees to promptly notify the District of any changes of ownership of the contracting party or any subcontractor while this Agreement is in force.

Diversified Thermal Services

Contracting Party

Rey Agustin, Account Manager

Name of Agent/Title

A handwritten signature in blue ink, appearing to read 'Rey Agustin', written over a horizontal line.



**DISABLED VETERAN BUSINESS ENTERPRISE (DVBE) PARTICIPATION
STATEMENT**

Each bidder must complete this form in order to comply with the Pasadena Unified School District ("District") policy for participation of disabled veteran business enterprises (School District projects funded in whole or in part by the State of California pursuant to the Leroy F. Greene School Facilities Act of 1998. (Education Code §17070.10, *et seq.*)

Project Name: Roof HVAC Replacement Project

Bid No.: 05/22-23

DSA No.: _____

The undersigned, on behalf of the Contractor named below, certifies that the Contractor has made reasonable efforts to secure participation by DVBE in the Contract to be awarded for the above-referenced Bid No., including participation by DVBE subcontractors and/or material suppliers. **Check only one of the following:**

- ☒ The Contractor was unable after reasonable efforts to secure DVBE participation in the Contract for the above-referenced Project/Bid No. However, the Contractor will use DVBE services if the opportunity arises at any time during construction of the Project. Upon completion of the Project, the Contractor will report to the District the total dollar amount of DVBE participation in any Contract awarded to Contractor, and in any change orders, for the above-referenced Project.
- ☐ The Contractor has secured DVBE participation in the Contract for the above referenced Project/Bid No., and anticipates that such DVBE participation will equal approximately _____ dollars (\$ _____), which represents approximately _____ percent (____%) of the total Contract for such Project. Upon completion of the Project, Contractor will report to the District the actual total dollar amount of DVBE participation in the Contract awarded to Contractor, and in any change orders, for such Project

Company: Diversified Thermal Services

Name: Rey Agustin

Title: Account Manager

Signature: 

Date: 02/16/2023



CONTRACTOR'S CERTIFICATE REGARDING DRUG-FREE WORKPLACE

This Drug-Free Workplace Certification form is required from all successful bidders pursuant to the requirements mandated by Government Code section 8350 et seq., the Drug-Free Workplace Act of 1990. The Drug-Free Workplace Act of 1990 requires that every person or organization awarded a contract or grant for the procurement of any property or service from any State agency must certify that it will provide a drug-free workplace by performing certain specified acts. In addition, the Act provides that each contract or grant awarded by a State agency may be subject to suspension of payments or termination of the contract or grant, and the Contractor or grantee may be subject to debarment from future contracting, if the contracting agency determines that specified acts have occurred.

Pursuant to Government Code section 8355, every person or organization awarded a contract or grant from a State agency shall certify that it will provide a drug-free workplace by doing all of the following:

1. Publishing a statement, notifying employees that the unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited in the person's or organization's workplace, and specifying actions which will be taken against employees for violations of the prohibition.
2. Establishing a drug-free awareness program to inform employees about all of the following:
 - a. The dangers of drug abuse in the workplace;
 - b. The person's or organization's policy of maintaining a drug-free workplace;
 - c. The availability of drug counseling, rehabilitation and employee-assistance programs; and
 - d. The penalties that may be imposed upon employees for drug abuse violations;
3. Requiring that each employee engaged in the performance of the contract or grant be given a copy of the statement required by subdivision (a) and that, as a condition of employment on the contract or grant, the employee agrees to abide by the terms of the statement.

I, the undersigned, agree to fulfill the terms and requirements of Government Code section 8355 listed above and will (a) publish a statement notifying employees concerning the prohibition of controlled substance at the workplace, (b) establish a drug-free awareness program, and (c) require each employee engaged in the performance of the contract be given a copy of the statement required by section 8355(a) and require such employee agree to abide by the terms of that statement.

I also understand that if the Pasadena Unified School District determines that I have either (a) made a false certification herein, or (b) violated this certification by failing to carry out the requirements of Section 8355, that the contract awarded herein is subject to termination, suspension of payments, or both. I further understand that, should I violate the terms of the Drug-Free Workplace Act of 1990, I may be subject to debarment in accordance with the requirements of Section 8350 et seq.

I acknowledge that I am aware of the provisions of Government Code section 8350 et seq. and hereby certify that I will adhere to the requirements of the Drug-Free Workplace Act of 1990.

DATE: 02/15/2023

Diversified Thermal Services

CONTRACTOR

By: 

Signature



**CONTRACTOR'S CERTIFICATE REGARDING ALCOHOLIC BEVERAGE AND
TOBACCO-FREE CAMPUS POLICY**

The Contractor agrees that it will abide by and implement the District's Alcoholic Beverage and Tobacco-Free Campus Policy, which prohibits the use of alcoholic beverages and tobacco products, of any kind and at any time, in District owned or leased buildings, on District property and in District vehicles. The Contractor shall procure signs stating "ALCOHOLIC BEVERAGE AND TOBACCO USE IS PROHIBITED" and shall ensure that these signs are prominently displayed in all entrances to school property at all times.

DATE: 02/15/2023

Diversified Thermal Services

CONTRACTOR

By: 

Signature



*** [End of Bid Documents to be Submitted with Bid]**

BID RECAP NO. 05-22/23

ROOF HVAC REPLACEMENT

OPENING DATE AND TIME 02/16/2023 2:00 PM

	CONTRACTOR NAME	JOBWALK	TIME STAMP	PREQUALIFIED CONTRACTOR	ACKNOWLEDGEMENT ACKNOWLEDGEMENT #1	ACKNOWLEDGEMENT ACKNOWLEDGEMENT #2	DESIGNATION OF SUBCONTRACTOR	BID FORM	CONTRACTOR 5-CENT AFFIDAVIT REGARDING WORKER'S COMP	NON-COLLUSION DECLARATION	BID BOND	SUBSTITUTION REQUEST FORM	SIGNATURE OF SIGNED PRACTICE REGARDING HONESTY	IVER PARTICIPATION STATEMENT	CONTRACTOR CERTIFICATE OF FREE WORKPLACE	ALCOHOL AND DRUGS AND TOBACCO FREE CAMPUS POLICY	LOMA ALTA ES	WESTERN ES	NORMA COMBES ES	JOHN BENTO ES	PASADENA HS	ALLOWANCE	TOTAL BID
1	AP Construction Group	✓	12:24PM	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$ 153,000.00	\$ 960,000.00	\$ 148,000.00	\$ 49,000.00	\$ 170,000.00	\$ 200,000.00	\$1,680,000.00
2	Diversified Thermal	✓	12:21PM	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$ 173,694.00	\$ 757,114.00	\$ 109,408.00	\$ 41,495.00	\$ 82,850.00	\$ 200,000.00	\$1,364,561.00
3	The Nazerian Group	✓	1:49PM	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	\$ 200,000.00	\$1,167,123.00	\$ 150,000.00	\$ 52,000.00	\$ 185,000.00	\$ 200,000.00	\$1,944,123.00



Budget Status by Fund

Budget status summary by Fund in selected Projects (thru 03/14/2023)

Budget vs. Commitments and Expenditures by Fund

Reconciliation Always in Progress

School Name - Project Name/Cost Group/Object Code/Contract Name	21.1 - GOB (Measure TT Series A)			Fund 21.1 Analysis		
	Budget	Commitments	Expenditures	Remaining Commitment	Retention	Uncommitted Available Balance
Altadena Elementary School - COMPLETE: Addition of 3 Shade Structures (95022.0)						
	90,187	90,187	90,187	-		-
Altadena Elementary School - COMPLETE: Measure T E-Rate (95180.0)						
	88,088	88,088	88,088	-		-
Altadena Elementary School - Modernization Project (95068.0) (2)						
	10,730,047	10,704,385	10,703,885	500		25,662
ALTADENA ELEM. TOTAL	10,908,321	10,882,659	10,882,159	500	-	25,662
Aveson Charter School (Noyes) - COMPLETE: Portable N Demolition Project (95029.0)						
	30,654	30,654	30,654	-		-
AVESON (NOYES) TOTAL	30,654	30,654	30,654	-	-	-
Blair High School - 04A Modernization of Main Building (95056.0) (2)						
	30,052,133	30,051,416	30,051,416	-		717
Blair High School - 04b Track and Field (95005.0) (2)						
	82,877	82,877	82,877	-		-
Blair High School - COMPLETE: Blair Middle School Campus (95001.0) (1) (2)						
	14,538,936	14,538,936	14,538,936	-		-
Blair High School - COMPLETE: Measure T E-Rate (95180.0)						
	428,677	428,677	428,677	-		-
Blair High School - COMPLETE: PROJECT CNLD - New 9th Grade Classroom (2)						
	1,146,779	1,146,779	1,146,779	-		-
BLAIR HS - Blair HS Site Access Improvement (ADA) (95056.1) (2)						
	51,285	51,285	51,285	-		-
BLAIR TOTAL	46,300,688	46,299,971	46,299,971	-	-	717
Burbank Elementary School - COMPLETE: Electrical Panel Upgrade (95064.0) (2)						
	87,603	87,603	87,603	-		-
Burbank Elementary School - COMPLETE: Renovation of Hodges (old 95140.0 merged)						
	253,584	253,584	253,584	-		-
Burbank Elementary School - Lunch Shelter/Renovation (95131.0) (1) (2) (3)						
	924,769	924,769	924,769	-		0
BURBANK TOTAL	1,265,956	1,265,956	1,265,956	-	-	0
Career Technical - Career Technical Education Projects (95145.0)						
	2,683,000	2,683,000	2,683,000	-		-
Career Technical - COMPLETE: CTE KLRN TV (95145.0)						
	100,507	100,507	100,507	-		-
CAREER TECHNICAL TOTAL	2,783,507	2,783,507	2,783,507	-	-	-
Central Kitchen - COMPLETE: Culinary Academy/Kitchen Construction (9)						
	1,238,928	1,238,928	1,238,928	-		-
CENTRAL KITCHEN TOTAL	1,238,928	1,238,928	1,238,928	-	-	-
Cleveland Elementary School - COMPLETE: Measure T E-Rate (95180.0)						
	113,292	113,292	113,292	-		-
Cleveland Elementary School - COMPLETE: New Classroom Wing (95031.0) (2)						
	4,594,037	4,594,037	4,594,037	-		-
Cleveland Elementary School - Modernize Kitchen (95121.0) (2)						
	108,495	108,495	108,495	-		-
Cleveland Elementary School - Student Safety Wall & Flooring Padding (2)						
	8,506	8,506	8,506	-		-
CLEVELAND ELEM. TOTAL	4,824,330	4,824,330	4,824,330	-	-	-
District Service Center - Facilities Administration (95000.0) (1) (2) (3)						
	16,465,560	16,263,218	16,250,742	12,476		202,342
DSC FACILITIES ADMIN	16,465,560	16,263,218	16,250,742	12,476	-	202,342
District Service Center - Facilities Administration (97092.0) 21.3						
	45,938	27,634	27,544	90		18,304
DSC FACILITIES ADMIN	45,938	27,634	27,544	90	-	18,304
District Wide - DW - Security Door Lockset Replacement (97119.0)						
	1,000,000	-	-	-		1,000,000



Budget Status by Fund

Budget status summary by Fund in selected Projects (thru 03/14/2023)

Budget vs. Commitments and Expenditures by Fund

Reconciliation Always in Progress

21.1 - GOB (Measure TT Series A)			Fund 21.1 Analysis		
District-Wide - COMPLETE: Bogen Clock Speaker System (95032.0)					
	1,436,405	1,436,405	1,436,405	-	-
District-Wide - COMPLETE: Energy Conservation Measures (95019.0) (2)					
	5,029,386	5,029,386	5,029,386	-	-
District-Wide - COMPLETE: Exterior Improvements (95036.0)					
	42,112	42,112	42,112	-	-
District-Wide - COMPLETE: Technology Modifications (95144.0)					
	3,071,556	3,071,556	3,071,556	-	-
District-Wide - District-Wide I.T. Wireless Access Upgrade (2)					
	3,000,000	3,000,000	3,000,000	-	109,813
District-Wide - DW - PRI 0 - Roofing (95135.0)					
	391,831	391,831	391,831	-	-
District-Wide - DW - PRI 0 - Windows (95136.0)					
	101,736	101,736	101,736	-	-
DISTRICT WIDE PROJECTS	14,073,026	13,073,026	13,073,026	-	109,813 1,000,000
Don Benito Elementary School - 11 HVAC and Kitchen (95146.0) (2)					
	263,398	263,398	263,398	-	-
Don Benito Elementary School - COMPLETE: Measure T E-Rate (95180.0)					
	147,679	147,679	147,679	-	-
Don Benito Elementary School - COMPLETE: Playground Structures (95043.0)					
	173,442	173,442	173,442	-	-
Don Benito Elementary School - Interim Housing (95181.0) (2)					
	397,779	397,779	397,779	-	-
Don Benito Elementary School - New Admin Bldg (95097.0) (2)					
	790,568	790,568	790,568	-	-
DON BENITO ELEM. TOTAL	1,772,865	1,772,865	1,772,865	-	-
Edison Elementary School - Edison ADA Upgrades (95143.0)					
	43,940	43,940	43,940	-	-
EDISON ELEMENTARY TOTAL	43,940	43,940	43,940	-	-
Eliot Middle School - 08 HVAC Upgrades (95146.0) (2)					
	828,427	828,427	828,427	-	-
Eliot Middle School - Auditorium/Cafe Modernization (95015.0) (2)					
	7,749,399	7,749,399	7,749,399	-	-
Eliot Middle School - COMPLETE: Career Technical Education (95145.0) (2)					
	29,261	29,261	29,261	-	-
Eliot Middle School - COMPLETE: Field Bleacher Replacement & ADA Upgrade (2)					
	92,835	92,835	92,835	-	-
Eliot Middle School - COMPLETE: Kitchen Modernization (95147.0) (2)					
	6,000	6,000	6,000	-	-
Eliot Middle School - COMPLETE: Lunch Shelter (95034.0) (2)					
	616,602	616,602	616,602	-	-
Eliot Middle School - COMPLETE: Measure T E-Rate (95180.0)					
	255,192	255,192	255,192	-	-
ELIOT MS CHILLED WATER PIPING CORR (95146.1) - ELIOT MS CHILLED WATER PIP					
	89,230	89,230	89,230	-	-
ELIOT MIDDLE SCHOOLS	9,666,945	9,666,945	9,666,945	-	-
Field Elementary School - COMPLETE: Measure T E-Rate (95180.0)					
	113,292	113,292	113,292	-	-
Field Elementary School - COMPLETE: Water Meter Separation (95106.0)					
	39,013	39,013	39,013	-	-
Field Elementary School - FIELD - Playground (95069.1) (2)					
	336,473	336,473	336,473	-	-
Field Elementary School - Modernization (95069.0) (2)					
	3,529,598	3,529,597	3,529,597	-	0
FIELD ELEMENTARY SCHOOL	4,018,376	4,018,375	4,018,375	-	0
Franklin Elementary School - COMPLETE: Measure T E-Rate (95180.0)					
	172,886	172,886	172,886	-	-



Budget Status by Fund

Budget status summary by Fund in selected Projects (thru 03/14/2023)

Budget vs. Commitments and Expenditures by Fund

Reconciliation Always in Progress

21.1 - GOB (Measure TT Series A)				Fund 21.1 Analysis		
Franklin Elementary School - COMPLETE: New Library/Shade Structure (95035.0)						
	593,078	593,078	593,078	-		-
Franklin Elementary School - Modernize Cafe/MPR/Windows (95066.0)						
	2,156,637	2,156,637	2,156,637	-		-
FRANKLIN ELEM. TOTAL	2,922,600	2,922,600	2,922,600	-	-	-
Hamilton Elementary School - COMPLETE: Measure T E-Rate (95180.0)						
	138,499	138,499	138,499	-		-
Hamilton Elementary School - COMPLETE: Water Meter Separation (95149.0)						
	56,828	56,828	56,828	-		-
Hamilton Elementary School - Modernization MPR/Café (95071.0) (2)						
	4,472,235	4,472,235	4,472,235	-		-
HAMILTON ELEM. TOTAL	4,667,562	4,667,562	4,667,562	-	-	-
Jackson Elementary School - 13 Modernization / Parking Lot (95052.0)						
	4,661,384	4,661,384	4,661,384	-		-
Jackson Elementary School - COMPLETE: Measure T E-Rate (95180.0)						
	130,487	130,487	130,487	-		-
Jackson Elementary School - COMPLETE: Phase I Completed Projects (95020.0 / 95						
	192,368	192,368	192,368	-		-
JACKSON ELEM. TOTAL	4,984,238	4,984,238	4,984,238	-	-	-
Jefferson Elementary School - COMPLETE: Measure T E-Rate (95180.0)						
	156,861	156,861	156,861	-		-
Jefferson Elementary School - Modernization (95079.0)						
	911,596	911,596	911,596	-		-
Jefferson Elementary School - New Child Care Center (95073.0)						
	332,171	332,171	332,171	-		-
JEFFERSON ELEM. TOTAL	1,400,627	1,400,627	1,400,627	-	-	-
John Muir High School - 03a Modernization, Abatement & Kitchen (95051.0) (2)						
	30,631,230	30,631,230	30,631,230	-		(0)
John Muir High School - 03b Black Box Theater Project (95183.0) (2)						
	3,724,986	3,724,986	3,724,986	-		-
John Muir High School - 03c Bldg D Accessibility (95812.0) (2)						
	349,165	349,165	349,165	-		-
John Muir High School - COMPLETE: Artificial Surface Field & Track (95004.						
	1,518,980	1,518,980	1,518,980	-		-
John Muir High School - COMPLETE: Building G & L Window Replacement (95125						
	404,282	404,282	404,282	-		-
John Muir High School - COMPLETE: Career Technical Education (95145.0)						
	90,596	90,596	90,596	-		-
John Muir High School - COMPLETE: Kitchen Modernization (95154.0)						
	6,000	6,000	6,000	-		-
John Muir High School - COMPLETE: Measure T E-Rate (95180.0)						
	555,842	555,842	555,842	-		-
John Muir High School - COMPLETE: Security System (95132.0)						
	159,785	159,785	159,785	-		-
John Muir High School - Culinary Arts Project (95184.0)						
	20,766	20,766	20,766	-		-
John Muir High School - Track and Field 95005.0 (2)						
	739,195	739,195	739,195	-		-
JOHN MUIR HIGH TOTAL	38,200,826	38,200,827	38,200,827	-	-	(0)
Linda Vista Elementary School - COMPLETE: Interior Structural Cleanup (95014.0)						
	39,580	39,580	39,580	-		-
Linda Vista Elementary School - Modernization (95188.0)						
	137,250	137,250	137,250	-		-
LINDA VISTA ELEM. TOTAL	176,830	176,830	176,830	-	-	-
Loma Alta Elementary School - COMPLETE: Measure T E-Rate (95180.0) (2)						
	63,647	63,647	63,647	-		-
Loma Alta Elementary School - COMPLETE: Modernization Project (95033.0)						



Budget Status by Fund

Budget status summary by Fund in selected Projects (thru 03/14/2023)

Budget vs. Commitments and Expenditures by Fund

Reconciliation Always in Progress

	21.1 - GOB (Measure TT Series A)			Fund 21.1 Analysis		
	171,002	171,002	171,002	-		-
Loma Alta Elementary School - COMPLETE: Pre K conversion & Fire sprinkler enclos						
	181,497	181,497	181,497	-		-
Loma Alta Elementary School - COMPLETE: Retaining Wall & Street Improvements (95						
	1,013,583	1,013,583	1,013,583	-		-
Loma Alta Elementary School - COMPLETE: Water Meter Separation (95101.0)						
	27,355	27,355	27,355	-		-
LOMA ALTA ELEM. TOTAL	1,457,084	1,457,084	1,457,084	-	-	-
Longfellow Elementary School - 10 HVAC Upgrades (95146.0)						
	2,320,756	2,320,756	2,320,756	-		-
Longfellow Elementary School - COMPLETE: Child Care Center (95061.0)						
	300,503	300,503	300,503	-		-
Longfellow Elementary School - COMPLETE: Measure T E-Rate (95180.0) (2)						
	130,358	130,358	130,358	-		-
Longfellow Elementary School - New Kitchen Bldg/Lunch Shelter/Auditorium (95050.0)						
	1,340,458	1,340,458	1,340,458	-		-
LONGFELLOW ELEM. TOTAL	4,092,074	4,092,074	4,092,074	-	-	-
Madison Elementary School - Bldg A & Auditorium Renovation (95010.0)						
	596,259	596,259	596,259	-		-
Madison Elementary School - COMPLETE: Measure T E-Rate (95180.0)						
	96,100	96,100	96,100	-		-
Madison Elementary School - COMPLETE: Window Replacement (95084.0)						
	858,784	858,784	858,784	-		-
Madison Elementary School - Kitchen Modernization (95048.0)						
	309,396	309,396	309,396	-		-
Madison Elementary School - Modernization (95063.0) (2)						
	4,109,419	4,109,419	4,109,419	-		-
MADISON ELEM. TOTAL	5,969,957	5,969,957	5,969,957	-	-	-
Marshall Fundamental Secondary School - 09 HVAC Upgrades (95146.0)						
	982,595	982,595	982,595	-		-
Marshall Fundamental Secondary School - COMPLETE: Career Technical Education (95						
	850	850	850	-		-
Marshall Fundamental Secondary School - COMPLETE: Electrical Upgrades (95091.0)						
	352,698	352,698	352,698	-		-
Marshall Fundamental Secondary School - COMPLETE: Library Modernization & Site Im						
	1,760,215	1,760,215	1,760,215	-		-
Marshall Fundamental Secondary School - COMPLETE: Measure T E-Rate (95180.0)						
	428,192	428,192	428,192	-		-
Marshall Fundamental Secondary School - COMPLETE: Water Meter Separation (95103						
	21,090	21,090	21,090	-		-
Marshall Fundamental Secondary School - COMPLETE: Window Replacement (95094.0)						
	1,767,862	1,767,862	1,767,862	-		-
Marshall Fundamental Secondary School - Marshall HS - Band Rm Repair (97107.0)						
	275,000	42,415	34,342	8,073		232,585
Marshall Fundamental Secondary School - Old Gym Renovation Project (95185.0)						
	1,333,706	1,333,706	1,333,706	-		-
Marshall Fundamental Secondary School - Sports Complex (95049.0) (2)						
	12,702,031	12,702,031	12,702,031	-		-
MARSHALL FUNDAMENTAL TOTAL	19,624,240	19,391,654	19,383,581	8,073	-	232,585
McKinley Elementary School - COMPLETE: Career Technical Education (95145.0)						
	51,619	51,619	51,619	-		-
McKinley Elementary School - COMPLETE: Measure T E-Rate (95180.0)						
	188,409	188,409	188,409	-		-
McKinley Elementary School - COMPLETE: Water Meter Separation (95159.0)						
	112,485	112,485	112,485	-		-
McKinley Elementary School - Phase I New Construction (95046.0)						
	20,006,670	20,006,670	20,006,670	-		-



Budget Status by Fund

Budget status summary by Fund in selected Projects (thru 03/14/2023)

Budget vs. Commitments and Expenditures by Fund

Reconciliation Always in Progress

21.1 - GOB (Measure TT Series A)				Fund 21.1 Analysis		
McKinley Elementary School - Phase II Modernization (95123.0) (2)						
	869,493	868,396	868,396	-		1,098
MCKINLEY K-8 TOTAL	21,228,676	21,227,578	21,227,578	-	-	1,098
Norma Coombs Elementary - 05a New CR Wing & Admin Bldg (95133.0) (2)						
	10,434,301	10,434,301	10,434,301	-		-
Norma Coombs Elementary - 05b Central Plant Replacement (95146.0)						
	1,358,170	1,358,170	1,358,170	-		-
Norma Coombs Elementary - COMPLETE: Measure T E-Rate (95180.0)						
	146,511	146,511	146,511	-		-
Norma Coombs Elementary - COMPLETE: Shade Structures/Field Renovation (95021)						
	75,715	75,715	75,715	-		-
Norma Coombs Elementary - COMPLETE: Water Meter Separation (95116.0) (2)						
	21,400	21,400	21,400	-		-
NORMA COOMBS ELEM. TOTAL	12,036,097	12,036,097	12,036,097	-	-	-
Pasadena High School - Campus Identity/Modernization Project (97108.0)						
	220,000	157,939	108,703	49,236		62,061
Pasadena High School - 02a Modernize Gymnasium Complex (95075.0) (2)						
	20,848,782	20,848,782	20,848,782	-		1
Pasadena High School - 02c ADA Upgrade (DSA) (95074.0) (2)						
	555,305	555,305	555,305	-		0
Pasadena High School - Central Chilled Water Plant Project (95146.0) (2)						
	3,878,790	3,878,789	3,878,789	-		1
Pasadena High School - COMPLETE: Artificial Track & Field (95005.0)						
	2,099,063	2,099,063	2,099,063	-		-
Pasadena High School - COMPLETE: Career Technical Education (95145.0)						
	116,593	116,593	116,593	-		-
Pasadena High School - COMPLETE: Drainage at Fields (95006.0)						
	700,902	700,902	700,902	-		-
Pasadena High School - COMPLETE: Fire Alarm Corrections (95161.0) (2)						
	36,005	36,005	36,005	-		-
Pasadena High School - COMPLETE: Measure T E-Rate (95180.0)						
	644,227	644,227	644,227	-		-
Pasadena High School - Kitchen Project (95139.0) (2)						
	287,321	287,321	287,321	-		-
Pasadena High School - Security System Upgrades (95117.0) (2)						
	248,424	248,424	248,424	-		-
Pasadena High School - Track and Field (95005.1) (2)						
	756,826	756,826	756,826	-		-
Pasadena High School (Phase 2) - 02d Campus Upgrds/Restrooms Upgrades (95119.0)						
	3,247,278	2,996,737	2,996,737	-		250,541
Pasadena High School (Phase 3) - 02b Campus Appearance/Identity (95080.0) (1) (2) (4)						
	184,994	159,996	159,996	-		24,998
PASADENA HIGH TOTAL	33,824,511	33,486,910	33,437,675	49,236	-	337,601
Roosevelt Elementary School - 12 Multi-purpose Facility (95025.0) (2)						
	1,831,607	1,831,607	1,831,607	-		-
Roosevelt Elementary School - COMPLETE: Auto Door Openers (95062.0)						
	98,844	98,844	98,844	-		-
Roosevelt Elementary School - COMPLETE: Measure T E-Rate (95180.0)						
	96,100	96,100	96,100	-		-
ROOSEVELT ELEM. TOTAL	2,026,550	2,026,550	2,026,550	-	-	-
Rose City High School - 07 Modification (95170.0) (2)						
	454,659	454,659	454,659	-		-
Rose City High School - COMPLETE: Career Technical Education (95145.0)						
	232,608	232,608	232,608	-		-
Rose City High School - COMPLETE: Measure T E-Rate (95180.0)						
	134,493	134,493	134,493	-		-
ROSE CITY HIGH TOTAL	821,759	821,759	821,759	-	-	-



Budget Status by Fund

Budget status summary by Fund in selected Projects (thru 03/14/2023)

Budget vs. Commitments and Expenditures by Fund

Reconciliation Always in Progress

21.1 - GOB (Measure TT Series A)				Fund 21.1 Analysis		
San Rafael Elementary School - COMPLETE: Measure T E-Rate (95180.0)						
	94,930	94,930	94,930	-		-
San Rafael Elementary School - COMPLETE: Phase I (95011.0/17.0)						
	169,380	169,380	169,380	-		-
San Rafael Elementary School - Modernization (95030.0) (2)						
	1,949,926	1,949,926	1,949,926	-		-
SAN RAFAEL ELEM. TOTAL	2,214,236	2,214,236	2,214,236	-	-	-
Sierra Madre Elementary School - 06 Phase II Upgrades (95126.0)						
	756,811	756,811	756,811	-		-
Sierra Madre Elementary School - COMPLETE: Phase I - New Permanent Classroom Bldg (95038.0) (2)						
	4,074,221	4,074,221	4,074,221	-		-
SIERRA MADRE ELEM. TOTAL	4,831,032	4,831,032	4,831,032	-	-	-
Sierra Madre Middle School - COMPLETE: Career Technical Education (95145.0)						
	38,113	38,113	38,113	-		-
Sierra Madre Middle School - COMPLETE: Measure T E-Rate (95180.0)						
	299,998	299,998	299,998	-		-
Sierra Madre Middle School - New MS Campus (95038.0) (2)						
	38,355,219	38,355,219	38,355,219	-		-
SIERRA MADRE MS TOTAL	38,693,330	38,693,330	38,693,330	-	-	-
Washington Accelerated Elementary School - 01 New Classroom/MPR Bldg (95045.0) (2)						
	20,301,145	20,301,145	20,301,145	-		-
Washington Accelerated Elementary School - Campus Improvements - Measure Y (95045.0) (2)						
	5,631	5,631	5,631	-		-
Washington Accelerated Elementary School - COMPLETE: Measure T E-Rate (95180.0)						
	251,858	251,858	251,858	-		-
Washington Accelerated Elementary School - New Child Care Center (95067.0) (2)						
	118,747	118,747	118,747	-		-
WASHINGTON ES TOTAL	20,677,381	20,677,381	20,677,381	-	-	-
Washington Middle School - COMPLETE: Career Technical Education (95145.0)						
	34,572	34,572	34,572	-		-
Washington Middle School - COMPLETE: Measure T E-Rate 95180.0 (2)						
	261,489	261,489	261,489	-		-
Washington Middle School - New Constr. & Mod. (95081.0) (2)						
	16,247,645	16,247,644	16,244,203	3,440		1
WASHINGTON MS TOTAL	16,543,706	16,543,705	16,540,265	3,440	-	1
Webster Elementary School - Aud/AdminBldg/Kitchen/Playground (95047.0) (2)						
	2,181,333	2,181,333	2,181,333	-		-
Webster Elementary School - COMPLETE: Kitchen Modernization (95083.0)						
	19,858	19,858	19,858	-		0
Webster Elementary School - COMPLETE: Measure T E-Rate 95180.0						
	139,666	139,666	139,666	-		-
Webster Elementary School - COMPLETE: Preschool Shade Structure (95105.0)						
	132,613	132,613	132,613	-		-
WEBSTER ELEM. TOTAL	2,473,471	2,473,471	2,473,471	-	-	0
Willard Elementary School - COMPLETE: Exterior Upgrade & Window Replacement (95002.0)						
	711,113	711,113	711,113	-		-
Willard Elementary School - COMPLETE: Field Installation/Irrigation & Demo (95002.0)						
	156,606	156,606	156,606	-		-
Willard Elementary School - COMPLETE: Multi-Use Room (95002.0)						
	428,811	428,811	428,811	-		-
Willard Elementary School - COMPLETE: Power & Fire Alarm Upgrade (95065.0)						
	393,698	393,698	393,698	-		-
Willard Elementary School - COMPLETE: Water Meter Separation (95108.0)						
	47,115	47,115	47,115	-		-
Willard Elementary School - HVAC Upgrades (95187.0)						
	297,217	297,217	297,217	-		-
Willard Elementary School - Kinder and Pre-K Complex (95115.0) (2)						



Budget Status by Fund

Budget status summary by Fund in selected Projects (thru 03/14/2023)

Budget vs. Commitments and Expenditures by Fund

Reconciliation Always in Progress

	21.1 - GOB (Measure TT Series A)			Fund 21.1 Analysis		
	4,138,009	4,138,009	4,138,009	-	-	-
WILLARD ELEM. TOTAL	6,172,568	6,172,568	6,172,568	-	-	-
Wilson Middle School - COMPLETE: Classroom Demolition (95028.0)						
	72,421	72,421	72,421	-	-	-
Wilson Middle School - COMPLETE: Painting & Window Replacement (95009.0)						
	618,777	618,777	618,777	-	-	-
Wilson Middle School - COMPLETE: Water Meter Separation (95109.0)						
	79,225	79,225	79,225	-	-	-
Wilson Middle School - Gym/Locker RM Courtyard Mod (95113.0)						
	5,036,321	5,036,321	5,036,321	-	-	-
Wilson Middle School - Interim Housing (95181.0)						
	7,400	7,400	7,400	-	-	-
WILSON MS TOTAL	5,814,145	5,814,145	5,814,145	-	-	-
Totals	364,292,536	362,474,226	362,400,411	73,815	109,813	1,818,310

COC Report (by Project)

PUSD Projects



Total Bond Funding - 21.3 Measure O - Facilities	\$456,352,760.35
Current Budget Total	\$48,696,151.69
Current Contracts Committed	\$37,400,466.19
Payables Invoiced	\$20,807,149.52
Unallocated Funds	\$407,656,608.66

SCHOOL NAME - PROJECT NAME	PROJECT BUDGET	ORIGINAL CONTRACT	APPROVED CHANGES	CURRENT CONTRACT AMT	INVOICED TO DATE	BUDGET DELTA	COMMITMENT REMAINING
School Type: 01- Elementary Schools	\$14,016,696.54	\$6,926,335.70	\$0.00	\$6,926,335.70	\$3,555,186.30	\$7,090,360.84	\$3,371,149.40
School Name: Altadena Arts Magnet	\$935,413.89	\$537,784.73	\$0.00	\$537,784.73	\$414,258.43	\$397,629.16	\$123,526.30
Project: Altadena Phase 1 Reroofing Program	\$485,413.89	\$485,413.89	\$0.00	\$485,413.89	\$392,521.43	\$0.00	\$92,892.46
Project: Allendale Relocation of (3) Portables from All	\$450,000.00	\$52,370.84	\$0.00	\$52,370.84	\$21,737.00	\$397,629.16	\$30,633.84
School Name: Don Benito Fundamental	\$922,388.64	\$822,388.64	\$0.00	\$822,388.64	\$229,545.57	\$100,000.00	\$592,843.07
Project: Don Benito Phase 2 Reroofing Program	\$822,388.64	\$822,388.64	\$0.00	\$822,388.64	\$229,545.57	\$0.00	\$592,843.07
Project: Don Benito HVAC Replacements	\$100,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100,000.00	\$0.00
School Name: Field Elementary	\$872,249.62	\$216,172.12	\$0.00	\$216,172.12	\$19,019.17	\$656,077.50	\$197,152.95
Project: Field Phase 1 Shade Structure Program	\$247,249.62	\$198,012.12	\$0.00	\$198,012.12	\$2,449.17	\$49,237.50	\$195,562.95
Project: Field ES Fencing and Curb Appeal	\$625,000.00	\$18,160.00	\$0.00	\$18,160.00	\$16,570.00	\$606,840.00	\$1,590.00
School Name: Hamilton Elementary	\$247,249.62	\$130,989.06	\$0.00	\$130,989.06	\$2,499.17	\$116,260.56	\$128,489.89
Project: Hamilton Phase 1 Shade Structure Program	\$247,249.62	\$130,989.06	\$0.00	\$130,989.06	\$2,499.17	\$116,260.56	\$128,489.89
School Name: Jefferson Children's Center	\$193,180.57	\$193,180.57	\$0.00	\$193,180.57	\$157,345.85	\$0.00	\$35,834.72
Project: Jefferson CC Phase 1 Reroofing Program	\$193,180.57	\$193,180.57	\$0.00	\$193,180.57	\$157,345.85	\$0.00	\$35,834.72
School Name: Madison Elementary	\$1,325,146.39	\$1,131,715.73	\$0.00	\$1,131,715.73	\$812,595.77	\$193,430.66	\$319,119.96
Project: Madison Phase 1 Reroofing Program	\$939,010.77	\$939,010.77	\$0.00	\$939,010.77	\$810,096.60	\$0.00	\$128,914.17
Project: Madison Phase 1 Shade Structure Program	\$386,135.62	\$192,704.96	\$0.00	\$192,704.96	\$2,499.17	\$193,430.66	\$190,205.79
School Name: Norma Coombs Elementary	\$2,545,208.87	\$1,868,840.43	\$0.00	\$1,868,840.43	\$722,479.95	\$676,368.44	\$1,146,360.48
Project: Norma Coombs Phase 1 Shade Structure Pro	\$572,242.62	\$245,874.18	\$0.00	\$245,874.18	\$2,499.17	\$326,368.44	\$243,375.01

COC Report (by Project)

PUSD Projects



SCHOOL NAME - PROJECT NAME	PROJECT BUDGET	ORIGINAL CONTRACT	APPROVED CHANGES	CURRENT CONTRACT AMT	INVOICED TO DATE	BUDGET DELTA	COMMITMENT REMAINING
Project: Norma Coombs Phase 2 Reroofing Program	\$1,622,966.25	\$1,622,966.25	\$0.00	\$1,622,966.25	\$719,980.78	\$0.00	\$902,985.47
Project: Norma Coombs HVAC Upgrade	\$350,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$350,000.00	\$0.00
School Name: San Rafael Elementary	\$740,094.00	\$740,094.00	\$0.00	\$740,094.00	\$455,813.78	\$0.00	\$284,280.22
Project: San Rafael Phase 2 Reroofing Program	\$740,094.00	\$740,094.00	\$0.00	\$740,094.00	\$455,813.78	\$0.00	\$284,280.22
School Name: Sierra Madre Elementary	\$3,326,332.22	\$322,860.22	\$0.00	\$322,860.22	\$251,757.59	\$3,003,472.00	\$71,102.63
Project: Sierra Madre ES Phase 1 Reroofing Program	\$322,860.22	\$322,860.22	\$0.00	\$322,860.22	\$251,757.59	\$0.00	\$71,102.63
Project: Sierra Madre ES Central Plant Upgrades	\$3,003,472.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,003,472.00	\$0.00
School Name: Washington Elementary STEM	\$733,350.62	\$286,228.10	\$0.00	\$286,228.10	\$2,499.15	\$447,122.52	\$283,728.95
Project: Washington ES Phase 1 Shade Structure Proj	\$733,350.62	\$286,228.10	\$0.00	\$286,228.10	\$2,499.15	\$447,122.52	\$283,728.95
School Name: Webster Elementary	\$2,176,082.10	\$676,082.10	\$0.00	\$676,082.10	\$487,371.87	\$1,500,000.00	\$188,710.23
Project: Webster Phase 1 Reroofing Program	\$481,496.92	\$481,496.92	\$0.00	\$481,496.92	\$418,471.67	\$0.00	\$63,025.25
Project: Webster Phase 2 Reroofing Program	\$194,585.18	\$194,585.18	\$0.00	\$194,585.18	\$68,900.20	\$0.00	\$125,684.98
Project: Webster HVAC Upgrade	\$1,500,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,500,000.00	\$0.00
School Type: 02 - Middle Schools	\$5,226,526.88	\$3,172,252.22	\$0.00	\$3,172,252.22	\$2,082,173.88	\$2,054,274.66	\$1,090,078.34
School Name: Eliot Arts Magnet Academy	\$871,066.78	\$871,066.78	\$0.00	\$871,066.78	\$761,458.93	\$0.00	\$109,607.85
Project: Eliot Phase 1 Reroofing Program	\$871,066.78	\$871,066.78	\$0.00	\$871,066.78	\$761,458.93	\$0.00	\$109,607.85
School Name: McKinley Middle	\$2,355,460.10	\$2,301,185.44	\$0.00	\$2,301,185.44	\$1,320,714.95	\$54,274.66	\$980,470.49
Project: McKinley School Phase 1 Shade Structure Pr	\$247,249.62	\$192,974.96	\$0.00	\$192,974.96	\$2,499.17	\$54,274.66	\$190,475.79
Project: McKinley Phase 2 Reroofing Program	\$2,108,210.48	\$2,108,210.48	\$0.00	\$2,108,210.48	\$1,318,215.78	\$0.00	\$789,994.70
School Name: Wilson Middle	\$2,000,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,000,000.00	\$0.00
Project: Wilson MS Campus Reconfiguration - Rose C	\$1,000,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000,000.00	\$0.00
Project: Wilson MS Campus Reconfiguration - PALS	\$1,000,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000,000.00	\$0.00

COC Report (by Project)

PUSD Projects



SCHOOL NAME - PROJECT NAME	PROJECT BUDGET	ORIGINAL CONTRACT	APPROVED CHANGES	CURRENT CONTRACT AMT	INVOICED TO DATE	BUDGET DELTA	COMMITMENT REMAINING
School Type: 03 - High Schools	\$16,117,986.96	\$15,661,936.96	\$0.00	\$15,661,936.96	\$8,943,768.76	\$456,050.00	\$6,718,168.20
School Name: John Muir High	\$3,321,894.36	\$3,321,894.36	\$0.00	\$3,321,894.36	\$3,285,506.87	\$0.00	\$36,387.49
Project: Muir Phase 1 Reroofing Program	\$3,321,894.36	\$3,321,894.36	\$0.00	\$3,321,894.36	\$3,285,506.87	\$0.00	\$36,387.49
School Name: Marshall Fundamental	\$3,696,079.59	\$3,310,429.59	\$0.00	\$3,310,429.59	\$2,023,844.13	\$385,650.00	\$1,286,585.46
Project: Marshall Phase 1 Reroofing Program	\$1,475,488.09	\$1,475,488.09	\$0.00	\$1,475,488.09	\$1,431,517.44	\$0.00	\$43,970.65
Project: Marshall Phase 2 Reroofing Program	\$1,804,591.50	\$1,804,591.50	\$0.00	\$1,804,591.50	\$578,047.90	\$0.00	\$1,226,543.60
Project: Marshall Softball Repair and Renovation	\$416,000.00	\$30,350.00	\$0.00	\$30,350.00	\$14,278.79	\$385,650.00	\$16,071.21
School Name: Pasadena High School + Focus Point	\$9,100,013.01	\$9,029,613.01	\$0.00	\$9,029,613.01	\$3,634,417.76	\$70,400.00	\$5,395,195.25
Project: PHS Phase 1 Reroofing Program	\$3,675,013.01	\$3,675,013.01	\$0.00	\$3,675,013.01	\$3,631,499.01	\$0.00	\$43,514.00
Project: Focus Point Fencing	\$75,000.00	\$4,600.00	\$0.00	\$4,600.00	\$2,918.75	\$70,400.00	\$1,681.25
Project: PHS Identity Project (Construction)	\$5,000,000.00	\$5,000,000.00	\$0.00	\$5,000,000.00	\$0.00	\$0.00	\$5,000,000.00
Project: PHS HVAC Upgrade PHS	\$350,000.00	\$350,000.00	\$0.00	\$350,000.00	\$0.00	\$0.00	\$350,000.00
School Type: 04 - Charter Schools	\$1,448,621.68	\$1,148,621.68	\$0.00	\$1,148,621.68	\$336,213.70	\$300,000.00	\$812,407.98
School Name: Cleveland - ECDP - SPED - OCS-South	\$361,064.58	\$361,064.58	\$0.00	\$361,064.58	\$115,623.80	\$0.00	\$245,440.78
Project: Cleveland ES Phase 2 Reroofing Program	\$361,064.58	\$361,064.58	\$0.00	\$361,064.58	\$115,623.80	\$0.00	\$245,440.78
School Name: Loma Alta - Oak Knoll - Pasadena Rosebud Academy	\$1,087,557.10	\$787,557.10	\$0.00	\$787,557.10	\$220,589.90	\$300,000.00	\$566,967.20
Project: Loma Alta Phase 2 Reroofing Program	\$787,557.10	\$787,557.10	\$0.00	\$787,557.10	\$220,589.90	\$0.00	\$566,967.20
Project: Loma Alta HVAC Replacements	\$300,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$300,000.00	\$0.00
School Type: 06 - Educational Technology	\$432,569.31	\$432,569.31	\$0.00	\$432,569.31	\$369,068.70	\$0.00	\$63,500.61
School Name: Districtwide Projects	\$432,569.31	\$432,569.31	\$0.00	\$432,569.31	\$369,068.70	\$0.00	\$63,500.61
Project: Districtwide IP Phone Upgrade	\$432,569.31	\$432,569.31	\$0.00	\$432,569.31	\$369,068.70	\$0.00	\$63,500.61

COC Report (by Project)

PUSD Projects



SCHOOL NAME - PROJECT NAME	PROJECT BUDGET	ORIGINAL CONTRACT	APPROVED CHANGES	CURRENT CONTRACT AMT	INVOICED TO DATE	BUDGET DELTA	COMMITMENT REMAINING
School Type: 07 - Facilities	\$11,453,750.32	\$10,058,750.32	\$0.00	\$10,058,750.32	\$5,520,738.18	\$1,395,000.00	\$4,538,012.14
School Name: District Service Center	\$11,453,750.32	\$10,058,750.32	\$0.00	\$10,058,750.32	\$5,520,738.18	\$1,395,000.00	\$4,538,012.14
Project: DSC Phase 1 Reroofing Program	\$1,862,179.97	\$1,862,179.97	\$0.00	\$1,862,179.97	\$1,753,375.70	\$0.00	\$108,804.27
Project: Facilities	\$8,036,570.35	\$8,036,570.35	\$0.00	\$8,036,570.35	\$3,753,936.59	\$0.00	\$4,282,633.76
Project: Districtwide Turnkey Design and Construction	\$95,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$95,000.00	\$0.00
Project: Districtwide Staff Housing at Roosevelt Camp	\$160,000.00	\$160,000.00	\$0.00	\$160,000.00	\$13,425.89	\$0.00	\$146,574.11
Project: Districtwide Security Door Lockset Replacement	\$1,100,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,100,000.00	\$0.00
Project: Charter Schools Security Door Lockset Replacement	\$200,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$200,000.00	\$0.00
21.3 Measure O - Facilities Totals:	\$48,696,151.69	\$37,400,466.19	\$0.00	\$37,400,466.19	\$20,807,149.52	\$11,295,685.50	\$16,593,316.67

COC Report (by Project)

PUSD Projects



Total Bond Funding - 21.2 Measure O - ITS	\$59,909,702.81
Current Budget Total	\$22,827,901.97
Current Contracts Committed	\$22,827,901.97
Payables Invoiced	\$8,807,883.34
Unallocated Funds	\$37,081,800.84

SCHOOL NAME - PROJECT NAME	PROJECT BUDGET	ORIGINAL CONTRACT	APPROVED CHANGES	CURRENT CONTRACT AMT	INVOICED TO DATE	BUDGET DELTA	COMMITMENT REMAINING
School Type: 06 - Educational Technology	\$22,827,901.97	\$22,791,195.06	\$36,706.91	\$22,827,901.97	\$8,807,883.34	\$0.00	\$14,020,018.63
School Name: Districtwide Projects	\$22,827,901.97	\$22,791,195.06	\$36,706.91	\$22,827,901.97	\$8,807,883.34	\$0.00	\$14,020,018.63
Project: Districtwide Staff Device Refresh	\$7,922,259.69	\$7,885,552.78	\$36,706.91	\$7,922,259.69	\$0.00	\$0.00	\$7,922,259.69
Project: Districtwide Server Wide Infrastructure Upgra	\$1,624,580.59	\$1,624,580.59	\$0.00	\$1,624,580.59	\$1,609,667.90	\$0.00	\$14,912.69
Project: Districtwide Student Device Refresh	\$12,568,385.40	\$12,568,385.40	\$0.00	\$12,568,385.40	\$6,530,372.68	\$0.00	\$6,038,012.72
Project: Districtwide Computer Lab Upgrade - PHS	\$44,833.53	\$44,833.53	\$0.00	\$44,833.53	\$0.00	\$0.00	\$44,833.53
Project: Districtwide Chromebook Lease Buyback	\$667,842.76	\$667,842.76	\$0.00	\$667,842.76	\$667,842.76	\$0.00	\$0.00
21.2 Measure O - ITS Totals:	\$22,827,901.97	\$22,791,195.06	\$36,706.91	\$22,827,901.97	\$8,807,883.34	\$0.00	\$14,020,018.63

Project Status Report (by School)

PUSD Projects



Fund Source: 21.1 Measure TT

Total Projects	2
Design	2

SCHOOL NAME - PROJECT NAME	PHASE	NTP DATE	SUBSTANTIAL COMPLETION	PERCENT COMPLETE	DSA REQ'D	UPDATE STATUS
School Type: 03 - High Schools						
School Name: Marshall Fundamental						
Project: Marshall Band Room Ceiling Repair	Design			95%	Yes	Bids received. Lowest responsible bidder is Shenk Developers. Board report submitted to approve contractor.
School Name: Pasadena High School + Focus Point						
Project: PHS Identity Project (Design)	Design			90%		DSA responded with few minor structural corrections. Correction have been addressed and resubmitted for DSA review and approval.

Project Status Report (by School)

PUSD Projects



Fund Source: 21.3 Measure O - Facilities

Total Projects	43
Construction	19
Design	14
Investigation	3
Procurement	7

SCHOOL NAME - PROJECT NAME	PHASE	NTP DATE	SUBSTANTIAL COMPLETION	PERCENT COMPLETE	DSA REQ'D	UPDATE STATUS
School Type: 01- Elementary Schools						
School Name: Altadena Arts Magnet						
Project: Allendale Relocation of (3) Portables from Allendale	Design			0%	Yes	Job walk conducted on March 7, 2023 at 10:00 a.m. Bids are due on March 23, 2023 by 2:00 p.m.
Project: Altadena Phase 1 Reroofing Program	Construction	6/6/2022		95%	Yes	Punch work completion by District Spring Break
School Name: Don Benito Fundamental						
Project: Don Benito Phase 2 Reroofing Program	Construction			0%		Start: Summer 23
Project: Don Benito HVAC Replacements	Procurement					Job walk scheduled 3/15-3/17
School Name: Field Elementary						
Project: Field Phase 1 Shade Structure Program	Design			0%	Yes	Preapplication meeting with DSA anticipated end of March. Arcadis confirmed with DSA only OTC review is required for PC shade structures.
Project: Field ES Fencing and Curb Appeal	Design			0%		Final Design in review for RFP in process. District discussion ongoing.
School Name: Hamilton Elementary						
Project: Hamilton Phase 1 Shade Structure Program	Design			0%	Yes	Preapplication meeting with DSA anticipated end of March. Arcadis confirmed with DSA only OTC review is required for PC shade structures.
School Name: Jefferson Children's Center						
Project: Jefferson CC Phase 1 Reroofing Program	Construction	6/6/2022		95%	No	Punch work completion by District Spring Break

Project Status Report (by School)

PUSD Projects



SCHOOL NAME - PROJECT NAME	PHASE	NTP DATE	SUBSTANTIAL COMPLETION	PERCENT COMPLETE	DSA REQ'D	UPDATE STATUS
School Name: Madison Elementary						
Project: Madison Phase 1 Shade Structure Program	Design			0%	Yes	Preapplication meeting with DSA anticipated end of March. Arcadis confirmed with DSA only OTC review is required for PC shade structures.
Project: Madison Phase 1 Reroofing Program	Construction	6/6/2022		98%	No	Punch work completion by District Spring Break
School Name: Norma Coombs Elementary						
Project: Norma Coombs HVAC Upgrade	Procurement			0%		Job walk scheduled 3/15-3/17
Project: Norma Coombs Phase 1 Shade Structure Program	Design			0%	No	Preapplication meeting with DSA anticipated end of March. Arcadis confirmed with DSA only OTC review is required for PC shade structures.
Project: Norma Coombs Phase 2 Reroofing Program	Construction			0%		Start: Summer 23
School Name: San Rafael Elementary						
Project: San Rafael Phase 2 Reroofing Program	Construction			0%		Start: Summer 23
School Name: Sierra Madre Elementary						
Project: Sierra Madre ES Central Plant Upgrades	Design			0%	No	Pending Purchase Order
Project: Sierra Madre ES Phase 1 Reroofing Program	Construction	6/6/2022		90%	No	Punch work completion by District Spring Break
School Name: Washington Elementary STEM						
Project: Washington ES Phase 1 Shade Structure Program	Design			0%	Yes	Preapplication meeting with DSA anticipated end of March. Arcadis confirmed with DSA only OTC review is required for PC shade structures.
School Name: Webster Elementary						
Project: Webster HVAC Upgrade	Procurement			0%		Job walk scheduled 3/15-3/17
Project: Webster Phase 2 Reroofing Program	Construction			0%		Start: Summer 23
Project: Webster Phase 1 Reroofing Program	Construction	6/6/2022		90%	No	Punch work completion by District Spring Break

Project Status Report (by School)

PUSD Projects



SCHOOL NAME - PROJECT NAME	PHASE	NTP DATE	SUBSTANTIAL COMPLETION	PERCENT COMPLETE	DSA REQ'D	UPDATE STATUS
School Type: 02 - Middle Schools						
School Name: Eliot Arts Magnet Academy						
Project: Eliot Phase 1 Reroofing Program	Construction	6/6/2022		95%	No	Punch work completion by District Spring Break
School Name: McKinley Middle						
Project: McKinley Phase 2 Reroofing Program	Construction			0%		Start: Summer 23
Project: McKinley School Phase 1 Shade Structure Program	Design			0%	Yes	Topographic surveys completed. Preapplication meeting with DSA anticipated end of March.
School Name: Wilson Middle						
Project: Wilson MS Campus Reconfiguration - Rose City HS	Design			0%		Detailed programming scope in work. Proposal due from PJHM.
Project: Wilson MS Campus Reconfiguration - PALS	Design			0%		Detailed programming scope in work. Proposal due from PJHM.
School Type: 03 - High Schools						
School Name: John Muir High						
Project: Muir Phase 1 Reroofing Program	Construction	6/6/2022		90%	No	Punch work completion by District Spring Break
School Name: Marshall Fundamental						
Project: Marshall Phase 1 Reroofing Program	Construction	6/6/2022		90%	No	Punch work completion by District Spring Break
Project: Marshall Softball Repair and Renovation	Design			0%		Survey report for new path sent to Architect. DSA-1 to be filed by AOR, reimbursable fee check amount TBD.
Project: Marshall Phase 2 Reroofing Program	Construction			0%		Start: Summer 23
School Name: Pasadena High School + Focus Point						
Project: PHS HVAC Upgrade PHS	Procurement			0%		Job walk scheduled 3/15-3/17
Project: PHS Identity Project (Construction)	Procurement			0%		Awaiting approved design docs for RFP
Project: PHS Phase 1 Reroofing Program	Construction	6/6/2022		95%	No	Punch work completion by District Spring Break

Project Status Report (by School)

PUSD Projects



SCHOOL NAME - PROJECT NAME	PHASE	NTP DATE	SUBSTANTIAL COMPLETION	PERCENT COMPLETE	DSA REQ'D	UPDATE STATUS
Project: Focus Point Fencing	Design			0%		On hold
School Type: 04 - Charter Schools						
School Name: Cleveland - ECDP - SPED - OCS-South						
Project: Cleveland ES Phase 2 Reroofing Program	Construction			0%		Start: Summer 23
School Name: Loma Alta - Oak Knoll - Pasadena Rosebud Academy						
Project: Loma Alta Phase 2 Reroofing Program	Construction			0%		Start: Summer 23
Project: Loma Alta HVAC Replacements	Procurement					Job walk scheduled 3/15-3/17
School Type: 06 - Educational Technology						
School Name: Districtwide Projects						
Project: Districtwide IP Phone Upgrade	Construction			10%	No	No action required. Multi-year active project (future invoices)
School Type: 07 - Facilities						
School Name: District Service Center						
Project: Districtwide Staff Housing at Roosevelt Campus	Investigation					Site walks - hazmat, historical assessment, tree specialist completed. Reports to receive in 2-4 weeks.
Project: Districtwide Security Door Lockset Replacement for PUSD Classrooms	Investigation					Details paperwork being developed with M&O Staff. RFP projected for 9/1
Project: Districtwide Turnkey Design and Construction Energy Services with Schneider Electric	Design					Facilities Committee Presentation 4/11. Sitewalks completed. 3/8 Irrigation scope pricing and 3/22 landscape scope pricing
Project: Facilities	Procurement				No	On going professional service contracts
Project: Charter Schools Security Door Lockset Replacement	Investigation			0%		Details paperwork being developed with M&O Staff. RFP projected for 9/1
Project: DSC Phase 1 Reroofing Program	Construction	6/6/2022		80%	No	Punch work completion by District Spring Break

Project Status Report (by School)

PUSD Projects



Fund Source: 21.2 Measure O - ITS

Total Projects	3
Close-Out	1
Construction	2

SCHOOL NAME - PROJECT NAME	PHASE	NTP DATE	SUBSTANTIAL COMPLETION	PERCENT COMPLETE	DSA REQ'D	UPDATE STATUS
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School Type: 06 - Educational Technology

School Name: Districtwide Projects

Project: Districtwide Staff Device Refresh	Construction			5%		No action required. Multi-year active project (future invoices)
Project: Districtwide Server Wide Infrastructure Upgrade	Close-Out			95%		No action required. Dell 23*0897 remaining balance in the account.
Project: Districtwide Student Device Refresh	Construction			95%		No action required. Multi-year active project (future invoices)