

PROPOSAL TO PROVIDE CONSTRUCTION MANAGEMENT SERVICES

NEWPORT-MESA UNIFIED SCHOOL DISTRICT

RFQ NO. 119-21

DUE: FEBRUARY 22, 2021 | 4:00 PM



Newport-Mesa
Unified School District



Erickson-Hall Construction
An Employee Owned Company

500 Corporate Drive
Escondido, CA 92029
RFQ Contact: Penny Lawlor
760.796.7700 p | 760.796.7750 f



build on our reputation

February 21, 2021

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

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

Dear Mr. Geiszler:

Erickson-Hall is pleased to submit our qualifications to provide construction management services to Newport-Mesa Unified School District. With more than \$1 billion of California K-12 school projects completed to date, we are recognized as a Southern California industry leader and offer the District wide-ranging expertise in all areas critical to the successful delivery of construction management services.

Erickson-Hall delivers superior quality projects to extremely satisfied school districts because we bring the right team with the right attitude to each project. Mat Gates, Vice President, and Justin Sinnott, Project Executive, will lead an energized, collaborative team effort focused on identifying and implementing the most cost-conscious approach, methods and materials for the delivery of District projects. They will be supported by a team of seasoned construction professionals offering an unwavering commitment to partnering with District representatives, design teams and trade contractors to achieve District goals and objectives for every project awarded to our firm. We will serve as a resource to the District and your design teams by providing timely input on cost and schedule impacts, constructability issues and value engineering opportunities. Throughout the construction phase we will carefully monitor the level of quality delivered by contractor forces while ensuring the District remains a good neighbor to the surrounding community. We are confident that Newport-Mesa Unified School District will enjoy Erickson-Hall's commitment to partnering with District representatives to achieve project goals and objectives.

Founded in 1998 by my partner Michael Hall and myself, Erickson-Hall is an employee-owned, Southern California-based construction manager and general contractor with a regional office located in Orange County. We value the relationship begun with Newport-Mesa Unified School District when we served as your general contractor on the Costa Mesa High School Field Project completed in 2016. We look forward to having the opportunity to expand that relationship by serving as the District's construction manager on future new construction and/or modernization projects.

Erickson-Hall's RFQ contact is:

Penny Lawlor, Marketing Director
500 Corporate Drive
Escondido, CA 92029
760.796.7700 p | 760.796.7750 f
plawlor@ericksonhall.com

Thank you for considering Erickson-Hall. Our team is assembled and ready to go to work!

Sincerely,



David Erickson
Chief Executive Officer

RFQ EVALUATION




Newport-Mesa
Unified School District

PROPOSAL TO PROVIDE CONSTRUCTION MANAGEMENT SERVICES

NEWPORT-MESA UNIFIED SCHOOL DISTRICT



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

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

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

Firm: **ERICKSON-HALL CONSTRUCTION CO.**

1. Location/Accessibility	Write in:	Max.
a. Firm's location - Write in city and county of headquarters or local office, whichever is closest to the District	12600 Westminster Ave., Suite D Santa Ana, CA 92706	5
2. Past Performance	Write in:	Max. Pts.
a. Identify the Firm's number of years' experience in providing services for K-12	22 Years	5
b. Project listing - Identify the number of K-12 projects the Firm has worked on within last 3 years	50+ Projects (Various Sizes)	5
c. Industry experience - Circle the type of projects the Project Team has worked on within the last 3 years (circle all that apply)	<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 1px solid black; border-radius: 50%; padding: 5px; text-align: center;">K-12</div> <div style="border: 1px solid black; border-radius: 50%; padding: 5px; text-align: center;">Community College</div> <div style="border: 1px solid black; border-radius: 50%; padding: 5px; text-align: center;">Charter/ Private School</div> <div style="border: 1px solid black; border-radius: 50%; padding: 5px; text-align: center;">Non- school District</div> <div style="border: 1px solid black; border-radius: 50%; padding: 5px; text-align: center;">Other Project Types</div> </div>	5
d. Identify the Firm's number of employees	169 Employees	5
3. Claims, Lawsuits, Arbitrations	Write in:	Max. Pts.
a. Identify the number allegations against the firm or any employee for any violations of law	None	5
b. Identify the number of settlements or judgments involving such actions within the last five (5) years	None	5
4. Record of Past Performance	Write in:	Max. Pts.
a. Identify the number of client references from a K-12 school district included in the Response (0-3)	3 References	5

I hereby certify that the above information is true and correct to the best of my knowledge.

By signing below, I further acknowledge that should any of the information I provide be found to be false, the Firm's Response shall be considered nonresponsive and ineligible for consideration.

David Erickson, Chief Executive Officer

Printed Name



Signature

February 21, 2020

Date

BUSINESS PROFILE




Newport-Mesa
Unified School District

PROPOSAL TO PROVIDE CONSTRUCTION MANAGEMENT SERVICES

NEWPORT-MESA UNIFIED SCHOOL DISTRICT



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FIRM INFORMATION

- Erickson-Hall Construction Co.
 - » A California Corporation
 - » David Erickson, Founding Principal | CEO
 - » Michael Hall, Founding Principal | COO
 - » 22 Years in Operation
 - » 169 Employees
 - » Employee-Owned

FIRM OWNERSHIP

- David Erickson - 24.9%
- Michael Hall - 24.9%
- Employee Stock Option Plan (ESOP) - 49%

LICENSE

- License Holder - Erickson-Hall Construction Co.
- C Corporate
- CA License No. - 751343
- Issue Date - July 3, 1998
- Expiration Date - July 31, 2022
- Classifications:
 - » A (General Engineering)
 - » B (General Building)
 - » Hazardous Substance Removal Certification
- Erickson-Hall's License has never been suspended or revoked.
- Tax ID - 91-1903631

OFFICE LOCATIONS

- **Los Angeles | Orange County Office**
12600 Westminster Ave., Suite D
Santa Ana, CA 92706
714.532.1060 p
Services performed for Newport-Mesa Unified School District will be delivered from Erickson-Hall's Orange County Office.
- **Corporate Headquarters**
500 Corporate Drive
Escondido, CA 92029
760.796.7700 p | 760.796.7750 f
- **Riverside County Office**
11810 Pierce Street, Unit 150
Riverside, CA 92505
951.358.0738 p
- **Imperial Valley Office**
216 E. 3rd Street
Imperial, CA 92251
760.355.1564 p

PROJECT TEAM FOR NEWPORT-MESA USD

Resumes provided in Experience Section.

- Mat Gates, Vice President
- Justin Sinnott, Project Executive
- Edgar Mendoza, Project Manager
- Mike Riley, Chief Estimator
- Perry Ko, Project Engineer
- Tim Tully, Superintendent

CORPORATE PROFILE

Erickson-Hall Construction Co., an employee-owned construction manager and licensed general contractor established in Escondido, California, in 1998 is recognized as a leader in the Southern California school construction industry. Our portfolio of experience exceeds \$1 billion of successful project completions. Sound financial strength has resulted in an aggregate bonding capacity of \$375 million and a single project bonding capacity of \$75 million.

Our firm's primary market focus is modernization and new construction of California K-12 school facilities utilizing a full menu of preconstruction and construction phase services and delivery processes, including CM Multiple Prime, CM-at-Risk, Agency CM, Design-Build, Design-Bid-Build and Lease-Leaseback.

Co-founded by David Erickson and Michael Hall, Erickson-Hall offers the depth and experience of a large, national organization while providing the personal attention clients expect from a locally owned construction company. More than a decade of achievement comes from longstanding relationships with districts, design professionals and trade partners. Erickson-Hall has developed an extensive client list encompassing school districts located throughout Southern California, including but not limited to:

- Newport-Mesa Unified School District
- Tustin Unified School District
- Downey Unified School District
- Anaheim Union High School District
- Anaheim Elementary School District
- Lowell Elementary School District
- El Monte Unified School District
- Long Beach Unified School District
- Little Lake City School District
- Whittier Union High School District
- Hermosa Beach Unified School District
- Santa Monica-Malibu Unified School District
- Santa Ana Unified School District
- Fullerton Joint Union High School
- Carlsbad Unified School District
- Fallbrook Union High School District
- San Dieguito Union High School District
- Oceanside Unified School District
- Vista Unified School District
- Escondido Union High School District
- Bonsall Unified School District
- Cajon Valley Union School District
- Grossmont Union High School District
- South Bay Union School District
- Temecula Valley Unified School District
- Moreno Valley Unified School District
- Riverside County Office of Education
- Val Verde Unified School District
- Valley Unified School District
- Lake Elsinore Unified School District

EXPERIENCE




Newport-Mesa
Unified School District

PROPOSAL TO PROVIDE CONSTRUCTION MANAGEMENT SERVICES NEWPORT-MESA UNIFIED SCHOOL DISTRICT



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CALIFORNIA K-12 NEW CONSTRUCTION & MODERNIZATION EXPERIENCE

Since Erickson-Hall's 1998 inception our firm's primary market focus has been concentrated in California K-12 new construction and modernization. Utilizing a comprehensive menu of services and delivery processes, Erickson-Hall has managed more than \$1 billion of a broad range of complex projects in various stages of completion for school district clients throughout Southern California. Our experience includes assisting multiple California school districts in their efforts to achieve state agency approvals and/or funding during project planning, as well as simultaneous oversight of multiple projects in various stages of design and construction. We serve as a resource to design teams by providing timely input on cost and schedule impacts as multiple design alternatives evolve into final design solutions. Our collaborative interaction ensures projects remain on track and within established budget parameters. Essential to our success has been our ability to streamline the DSA close-out process in the final stages of construction. Enhancing our success in on-time/on-budget project deliveries is our clear understanding of how to manage construction execution around the ongoing activities of active elementary, middle and high school campuses. We install noise reducing sound barriers at classrooms adjacent to construction activity. During all phases of construction, Erickson-Hall ensures the existing school campus utilities remain live and coordinate with Districts and design teams on phasing of utilities to most efficiently ensure the integrity of the campus learning environment is maintained at all times. Working on occupied school campuses requires a diligent commitment to jobsite safety, as well as "safety beyond the construction fence." Our team's first priority every day is ensuring the constant safety of students, faculty, staff and campus visitors. We partner with Districts to properly isolate and secure each work space. For each phase of construction, a District will be asked to review our site utilization maps clearly indicating the location of fencing, access gates, and paths of travel for students and staff. Upon installation of temporary fencing, our team will ensure District requirements are met and make any required fencing adjustments. If double gate systems are required during an interim housing process, we provide complete isolation between students and construction workers, including fully live scanned gate attendants. Safety of students, staff and campus visitors is our number one priority throughout the full course of construction.

Our list of K-12 projects delivered over the past 10 years is comprehensive; however, as directed by RFQ requirements, in this section we have provided a spreadsheet detailing 10 projects worked on by Erickson-Hall over the past 3 years.

PROJECT TEAM - TEAM MEMBER RESUMES PROVIDED IN THIS SECTION**• Mat Gates, Vice President**

Mat Gates, a Certified Construction Manager and LEED Accredited Professional, joined Erickson-Hall in 2004; his construction industry career spans more than 30 years and has been concentrated in the delivery of California K-12 school projects. Mat will provide senior management oversight of all preconstruction, construction, and post construction phase activities.

• Justin Sinnott, Project Executive

Justin Sinnott joined Erickson-Hall in 2014; his construction industry career has been concentrated in planning, coordinating and managing California K-12 new construction and modernization projects. He is responsible for leading his project teams to achieve client goals and objectives and for producing functional, financially viable projects within established cost and schedule parameters.

• Edgar Mendoza, Project Manager

Edgar Mendoza joined Erickson-Hall in 2018; he has over a decade of construction industry experience encompassing a broad range of projects, including the modernization and new construction of California K-12 school facilities. As Project Manager, Edgar is charged with preconstruction, construction, and post-construction tasks such as budget validation, value engineering, field orders and surveying as-built conditions, as well as assisting in assurance of contract compliance, timely submission of shop drawings, submittals, and product data.

• Mike Riley, Chief Estimator

Mike Riley has been an integral part of Erickson-Hall's estimating team since 2001 and has over 20 years of construction industry experience, encompassing a broad range of projects including the modernization and new construction of California K-12 school facilities. Mike is experienced in all facets of estimating including conceptual cost analysis, negotiated, firm-fixed pricing, subcontract solicitation, and bid analysis.

• Perry Ko, Project Engineer

Perry Ko joined Erickson-Hall in 2020 upon completion of his Bachelor of Science in Construction Management and is focused on the construction of California K-12 school projects. As Project Engineer, Perry will assist in monitoring and tracking construction progress and ensuring the timely processing of submittals and shop drawings.

• Tim Tully, Superintendent

Tim Tully joined Erickson-Hall in 2020; he has a decade of construction industry experience and has completed a broad range of commercial, industrial, and public works projects. As Superintendent, Tim is responsible for the project schedule execution, coordination of contractors, as well as overseeing all jobsite activities.

CALIFORNIA K-12 CONSTRUCTION MANAGEMENT EXPERIENCE - PAST 3 YEARS

A Partial List

DELIVERY METHOD	PROJECT NAME	OWNER	COMPLETION DATE	CONSTRUCTION VALUE	PROJECT DESCRIPTION
CM Multiple-Prime	Maybrook Elementary School	Lowell Joint School District David Bennett, Asst. Superintendent 562.902.4290	June - 2020	\$1,819,810	Infrastructure to accommodate installation of 16 new portables.
CM Multiple-Prime	El Monte High School	El Monte Union High School District Norma Macias, Director of Facilities, M&O, 626.444.9005	August - 2020	\$5,882,600	Phase 1: HVAC replacemnt across 6 sites. Phase 2: Modernization of Mountain View High School
CM Multiple-Prime	Alberhill Elementary School	Lake Elsinore Unified School District Greg Bowers, Asst. Superintendent 951.253.7015	August - 2020	\$27,244,065	Ground up elementary school with site improvements, buildings, and offsite street improvements.
CM Multiple-Prime	K-8 STEAM Academy	Temecula Valley Unified School District Janet Dixon, Director of Facilities Development, 951.506.7914	August - 2021	\$26,800,000	Construction of four new buildings totaling in approximately 47,000 square feet: an Administration Building, Multi-Purpose Building & 2 Classroom Buildings.
CM Multiple-Prime	San Dieguito Academy Arts & Humanities Building	San Dieguito Union High School District John Addleman, Executive Director, Planning, 760.753.6491	August - 2019	\$20,920,671	Construction of a new 59,000 SF English Arts (ESA) building and associated landscaping and site work.
CM Multiple-Prime	Canyon Springs High School Athletic Complex	Moreno Valley Unified School District Jorge Alvarado, Facilities Planner 951.571.7690	June - 2018	\$16,027,418	Construction of a new stadium/athletic complex to include a new Home & Visitor bleachers, all weather track and field, new support buildings, relocation of tennis courts, and renovation of existing ball fields.
CM Multiple-Prime	Jefferson Elementary School - Riverside	Riverside Unified School District Eric Walker, Assistant Director Facilities Projects 951.788.7496 x84705	October - 2020	\$14,987,956	Construction of new single story Kindergarten Classroom Building G ; Alteration of existing Portable Classroom Buildings and related site work.
CM Multiple-Prime	Oak Crest Middle School Science Building	San Dieguito Union High School District John Addleman, Executive Director, Planning 760.753.6491	August - 2018	\$7,825,604	Hazardous material abatement and demolition of existing building and construction of a new 13,739 SF Science Building. Scope includes interim housing utilities, demolition and replacement of Building F, repaving of basketball courts, and installation of sail shade and admin portable.
CM Multiple-Prime	Carmel Valley Middle School	San Dieguito Union High School District John Addleman, Executive Director, Planning, 760.753.6491	August - 2018	\$6,545,428	Renovation of existing Drama and Performing Arts Center, and new construction of a Music Building.
CM Multiple-Prime	Vail Ranch Middle School	Temecula Valley Unified School District Janet Dixon, Director of Facilities Development, 951.506.7914	August - 2019	\$5,826,000	The scope of work included the following; security modifications at interior/exterior gates and selected exterior doors/windows, landscaping and site improvements.

MAT GATES, CCM, LEED AP

Vice President

EDUCATION

B.S. Civil Engineering
San Diego State University

ASSOCIATIONS

- USGBC
- CMAA
- Association of California Construction Managers
- Coalition for Adequate School Housing

REFERENCES

Dena Johnson
Project Manager
Grossmont Union High School District
619.644.8051

Chris Wright
Assistant Superintendent, Business
Carlsbad Unified School District
760.331.5036

Nancy Nien
Former Assistant Superintendent
Los Alamitos Unified School District
714.999.3555

Mat Gates, a certified Construction Manager and LEED Accredited Professional, joined Erickson-Hall in 2004; his construction industry career spans more than 30 years and has been concentrated in the delivery of California K-12 school projects. Mat will provide senior management oversight of all preconstruction and construction phase activities, including design review meetings with project architects, subconsultants and District representatives, production of construction estimates and schedules, constructability reviews, value engineering analyses, schedule development and existing site surveys. He will work with our Construction Manager in the development of preconstruction schedules, phasing of work, interim housing schedules, long-lead schedules and the closeout process. Throughout construction, Mat will provide senior management oversight including schedule and budget implementation, quality, safety, commissioning and project closeout. He will participate in weekly construction meetings with District representatives and will track progress of required construction deliverables, such as submittals, operation and maintenance manuals, warranties and extra material stock.

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Maybrook Elementary School

Lowell Joint School District - \$2 Million

Infrastructure to accommodate 16 new portables.

El Monte High School

El Monte Union High School District - \$6 Million

District-wide HVAC upgrades and modernization of Mountain View High School.

Grossmont High School Event Center

Grossmont Union High School District - \$17.5 Million

Construction phase services for the construction of a 2,670 SF performing arts center.

Bonsall High School Science Classroom Building

Bonsall Unified School District - \$6.5 Million

Construction of a 2-story, 18,000 SF classroom building housing 8 learning studios, chemistry and biology labs, collaboration spaces and restrooms.

Valley Middle School Science Building/PE Building

Carlsbad Unified School District - \$4.2 Million

Construction of an 8,000 SF PE Building with science lab.

Los Alamitos High School STEM Building

Los Alamitos Unified School District - \$57 Million

Construction of a 3-story Science, Technology, Engineering & Mathematics Classroom Building on an occupied high school campus.

Sage Creek High School Performing Arts Center

Carlsbad Unified School District - \$15.5 Million

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

Carlsbad High School

Cultural Arts Center Modernization

Carlsbad Unified School District - \$5.1 Million

Expansion and modernization of an existing 14,244 SF Cultural Arts Center.

EDUCATION

BS, Structural Engineering
University of California, San Diego
Jacobs School of Engineering

REFERENCES

Chris Wright
Assistant Superintendent, Business
Carlsbad Unified School District
760.331.5036

Nancy Nien
Former Assistant Superintendent
Los Alamitos Unified School District
714.999.3555

William Crean
Superintendent
Little Lake City School District
562.868.8241

JUSTIN SINNOTT, CCM Project Executive

Justin Sinnott joined Erickson-Hall in 2014; his construction industry career has been concentrated in planning, coordinating and managing California K-12 new construction and modernization projects. He is responsible for leading his project teams to achieve client goals and objectives and for producing functional, financially viable projects within established cost and schedule parameters. As Project Executive, Justin ensures that every team member has a clear vision of the mission, budget and time constraints associated with every project, as well as the resources and support required for a successful project delivery. Experienced in maximizing the management tools available through a broad range of alternative delivery processes, Justin is well-versed in fostering a team environment that promotes creative thinking, innovative problem solving and issue resolution. He will work closely with project architects to manage design activities to ensure project designs are completed and coordinated between disciplines.

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Maybrook Elementary School

Lowell Joint School District - \$2 Million

Infrastructure to accommodate 16 new portables.

El Monte High School

El Monte Union High School District - \$6 Million

District-wide HVAC upgrades and modernization of Mountain View High School.

Los Alamitos High School STEM Building

Los Alamitos Unified School District - \$57 Million

Construction of a 3-story Science, Technology, Engineering & Mathematics Classroom Building on an occupied high school campus.

Sage Creek High School Performing Arts Center

Carlsbad Unified School District - \$15.5 Million

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

Carlsbad High School

Cultural Arts Center Modernization

Carlsbad Unified School District - \$5.1 Million

Expansion and modernization of an existing 14,244 SF Cultural Arts Center.

Field Renovations Project

Little Lake City School District - \$2.5 Million

District-wide field upgrades - 5 Campuses.

Bonsall High School Science Classroom Building

Bonsall Unified School District - \$6.5 Million

Comprehensive preconstruction and construction phase services for the construction of a 2-story, 18,000 SF classroom building housing 8 learning studios, chemistry and biology labs, collaboration spaces and restrooms.

Oceanside High School Performing Arts Center

Oceanside Unified School District - \$17.7 Million

Construction of a 29,067 SF Performing Arts Center located on a 2.47 acre site on the Oceanside High School campus.

EDGAR MENDOZA

Project Manager

EDUCATION

M.S. Structural Engineering &
Construction Management
CSU Fullerton

B.S. Civil Engineering
CSU Fullerton, 2014

TRAINING

- CPR | AED | First-Aid
- OSHA 30-Hour
- Defensive Driver Training
- Leadership Development Training

REFERENCES

Vince Marchetti
Maintenance Director
Long Beach Unified School District
562.997.8000

Nancy Nien
Former Assistant Superintendent
Los Alamitos Unified School District
714.999.3555

Edgar Mendoza joined Erickson-Hall in 2018; he has over a decade of construction industry experience encompassing a broad range of projects, including the modernization and new construction of California K-12 school facilities. As Project Manager, Edgar is charged with preconstruction, construction, and post-construction tasks such as budget validation, value engineering, field orders and surveying as-built conditions, as well as assisting in assurance of contract compliance, timely submission of shop drawings, submittals, and product data. Other duties will include preparation of monthly owner, contractor and trade contractor billings, overseeing preparation and submittal of warranties, operations and maintenance manuals, and guarantees. Edgar will manage weekly owner construction meetings, oversee site construction meetings, establish and update the project budget, review changes to the budget and project scope, and approve subcontractor's monthly progress payments. During construction, he will monitor execution of the project schedule and assist with design schedules for project milestones.

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

MacArthur Elementary School HVAC Upgrades Long Beach Unified School District - \$12 Million

Comprehensive preconstruction and construction phase services for the lease-leaseback delivery for campus wide HVAC upgrades on an occupied elementary school campus. Scope of work encompasses various site upgrades including utility service, technology, interior/exterior finishes, lighting, electrical, tactile signage and ADA required upgrades.

Wilson Elementary School ORG and Modernization Project Santa Ana Unified School District - \$4 Million

Construction of a new 2-story, 11,000 SF classroom building housing eight classrooms, HVAC units and a second floor elevated steel walkway with elevator access. Scope of work included campus courtyard reconfiguration with new retaining walls, 4-stop elevator and mechanical room, courtyard stage, new flatwork, irrigation and landscape upgrades and security fencing.

McKinley Elementary School HVAC Upgrades Long Beach Unified School District - \$11 Million

Scope of work encompasses partial demolition, new finishes, fixtures, T-grid ceilings and windows, ADA required upgrades, a student drop-off area and associated site work.

Los Alamitos High School STEM Building Los Alamitos Unified School District - \$57 Million

Construction of a 3-story Science, Technology, Engineering & Mathematics Classroom Building on an occupied high school campus.

San Bernardino USD HVAC Upgrades San Bernardino Unified School District, CA - \$5 Million

Scope of work consisted of HVAC upgrades and associated site improvements including structural and thermal insulation for various school campuses throughout the District.

Rancho Cucamonga Fire Protection District Training Center Rancho Cucamonga Fire Protection District - \$5 Million

Construction of new facilities for the RCFPD Fire Training Center. Scope of work encompassed an Administration Building A, Locker Building B, Data Building I, and associated site work and flatwork.

MIKE RILEY

Chief Estimator

Mike Riley has been an integral part of Erickson-Hall's estimating team since 2001 and has over 20 years of construction industry experience, encompassing a broad range of projects including the modernization and new construction of California K-12 school facilities. Mike is experienced in all facets of estimating including conceptual cost analysis, negotiated, firm-fixed pricing, subcontract solicitation, and bid analysis. As Chief Estimator, Mike produces budgets and cost estimates and procures general/prime contractors for each project. His responsibilities include estimating deliverables such as cost estimating, bid management and bid packaging, value engineering, constructability, and complete oversight of Erickson-Hall's estimating database. He will assist with contract negotiations and the preparation of detailed cost estimates at various stages of design and construction.

EDUCATION

Mesa Community College
Santa Clara University
San Diego State University

TRAINING

- CPR | AED | First Aid
- Defensive Driver Training
- OSHA 10-Hour
- Leadership Development Training
- Emergency Action Planning Awareness
- Fire Prevention Awareness
- Ladder Safety Awareness

REFERENCES

Jennifer Pearson
Program Manager
Downey Unified School District
310.266.5144

Nancy Nien
Former Assistant Superintendent
Los Alamitos Unified School District
714.999.3555

Vince Marchetti
Maintenance Director
Long Beach Unified School District
562.997.8000

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Griffiths Middle School Modernization

Downey Unified School District, CA - \$39.4 Million

Scope of work included a new 13,950 SF gymnasium with a performance platform and support spaces, a new 19,420 SF, 2-story building housing 12 classrooms, a teacher workroom, offices, restrooms and support spaces. Site work encompassed parking lot reconfiguration, new parking lot adjacent to the new gym, new lunch shelters, new decorative fencing and landscaping.

Los Alamitos High School STEM Building

Los Alamitos Unified School District - \$57 Million

Construction of a 3-story Science, Technology, Engineering & Mathematics Classroom Building on an occupied high school campus.

Sage Creek High School Performing Arts Center

Carlsbad Unified School District - \$15.5 Million

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

MacArthur Elementary School HVAC Upgrades

Long Beach Unified School District - \$12 Million

Comprehensive preconstruction and construction phase services for the lease-leaseback delivery for campus wide HVAC upgrades on an occupied elementary school campus. Scope of work encompasses various site upgrades including utility service, technology, interior/exterior finishes, lighting, electrical, tactile signage and ADA required upgrades.

McKinley Elementary School HVAC Upgrades

Long Beach Unified School District, CA - \$11 Million

Scope of work encompasses partial demolition, new finishes, fixtures, T-grid ceilings and windows, ADA required upgrades, a student drop-off area and associated site work.

Field Renovations Project

Little Lake City School District - \$2.5 Million

District-wide field upgrades - 5 Campuses.

Bonsall High School Science Classroom Building

Bonsall Unified School District - \$6.5 Million

Comprehensive preconstruction and construction phase services for the construction of a 2-story, 18,000 SF classroom building housing 8 learning studios, chemistry and biology labs, collaboration spaces and restrooms.

EDUCATION

B.S. Construction Management
California State University, Fresno

TRAINING

- OSHA 30-Hour
- Asbestos Awareness

REFERENCES

Vince Marchetti
Maintenance Director
Long Beach Unified School District
562.421.2075

PERRY KO Project Engineer

Perry Ko joined Erickson-Hall in 2020 upon completion of his Bachelor of Science in Construction Management and is focused on the construction of California K-12 school projects. As Project Engineer, Perry will assist our Project Manager and Superintendent in monitoring and tracking construction progress and document control compliance issues. He will maintain positive relationships with the District, design team, consultants and trade contractors throughout the full course of the project. Perry is charged with accurately preparing quantity surveys and pricing of proposed changes, field orders and ensuring as-built conditions are documented. He will assist in the assurance of contract compliance, and be responsible for the timely submission of shop drawings, submittals and product data. His duties also include preparation of monthly billings and overseeing preparation of post-construction submittals including warranties, operation and maintenance manuals, and guarantees.

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Cubberley K-8 School Modernization & HVAC Upgrades **Long Beach Unified School District, CA - \$14 Million**

Whole site modernization consisting of HVAC system upgrades and roof replacements. Scope of work included increasing electrical capacity to power new HVAC units. Classroom modernizations encompassed complete interior upgrades, new windows, ceilings, flooring, casework, white board and tack panels. Site work involved ADA upgrades to comply with accessibility codes.

Prisk Elementary School HVAC Project **Long Beach Unified School District, CA - \$12.9 Million**

Modernization of the campus HVAC system, interior renovations, and ADA upgrades at the administration, cafeteria, classroom, and auditorium building.

Kaiser Skyport Medical Office Building **San Jose, CA - \$85 Million**

New construction of the Kaiser Skyport Medical Office building. Scope of work included lobby spaces, health education facilities, blood draw / lab and pharmacy services. The new building houses space for optical services, dermatology, orthopedics, OB/GYN and internal medicine. Site work encompassed landscaping and utilities to support the medical office building. Project was LEED Gold Certified.

EDUCATION

College of Oceaneering, CA

TRAINING

- CPR | AED | First Aid
- OSHA 10-Hour
- SHPT
- SWPPP
- Defensive Driver
- Trenching and Excavating
- Fall Protection Competent Person
- Scaffolding Competent Person
- Confined Space Competent Person
- 8-hr Asbestos Awareness
- Scissor Lift Certified
- Crane Awareness

REFERENCES

Vince Marchetti
Maintenance Director
Long Beach Unified School District
562.421.2075

Aaron Raney
Architect
Advanced Medical Builders
714.634.4430

Sean Cotto
Owner
Universal Metro Flooring
562.906.8490

TIM TULLY Superintendent

Tim Tully joined Erickson-Hall in 2020; he has a decade of construction industry experience and has completed a broad range of commercial, industrial, and public works projects. As Superintendent, Tim is responsible for the project schedule execution, coordination of contractors, as well as overseeing all jobsite activities. He will also assist the team with constructability reviews. Throughout the construction process, he will ensure site security and enforce Erickson-Hall's quality control and national award winning safety programs. Other construction phase responsibilities include conducting construction safety and contractor coordination meetings throughout the duration of each project. During closeout, Tim will take the lead of creating the punch list, final inspections and the commissioning of facilities.

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Prisk Elementary School HVAC Project

Long Beach Unified School District, CA - \$12.9 Million

Modernization of the campus HVAC system, interior renovations, and ADA upgrades at the administration, cafeteria, classroom, and auditorium building.

Pueblo Orthopedic Center

Pasadena, CA - \$700,000

Construction of a new Phillips MRI Suite for the Pueblo Orthopedic Center in Pasadena.

Martin Luther King Hospital

Willowbrook, CA - \$400,000

Modernization of the Martin Luther King Hospital. Scope of work included a new Siemens CT room suite with installation of new equipment, expansion of the testing and pulmonary lab, upgrade of multiple offices and the cafeteria and a new permanent mobile CT pad.

San Bernardino Community Hospital

San Bernardino, CA - \$350,000

Modernization of the 57,000 SF San Bernardino Community Hospital. Scope of work included remodel of the GE CT room and equipment upgrades. Scope of work also included multiple restrooms, dressing rooms and ADA upgrades.

Loma Linda VA Hospital

Loma Linda, CA - \$250,000

Scope of work for the Loma Linda VA Hospital included remodel of the Siemens Nuclear Medical CT room, GE Interventional Radiology room, Siemens Radiology room, Siemens MRI room and equipment upgrades.

STATE AGENCY EXPERIENCE

Being knowledgeable in the various State funding programs pays dividends beyond the application submittal process. Erickson-Hall has been successful in “combining” funds from different State programs while working on a single site. By knowing the procedures and constraints of each program, along with tracking the timing of released funds, we will be able to “combine” scopes of work in a bid package or two, but break-out the work and track it separately in order for the District (or Erickson-Hall) to be able to submit Expenditures Reports and/or withstand an audit. Such State programs as New Construction, Modernization, Joint-Use, Deferred Maintenance, Restricted Maintenance, have been “combined” or concurrently bid on the same site in order to take advantage of economies of scale. Similar success with other programs such as Redevelopment Agencies, William’s Settlement, Energy Conservation Grants and a host of Instructional Grant Programs that have a component that allows for “start-up,” infrastructure or facilities have been completed at a cost savings as well.

By knowing how much, when and where various State funds can be utilized, Erickson-Hall will help NMUSD and your finance team decide when and how much the local bond issuances should be. We are always careful not to recommend or proceed with grouping any projects with different funding sources unless there is a comfort level with the District; specifically the Finance Department, and/or whoever is assigned the responsibility of project close-out and audit.

- **State Allocation Board (SAB)** was created over 60 years ago by the state legislature to be the governing authority responsible for the allocation of state resources. This 10-member Board works directly with the Office of Public School Construction (OPSC) to authorize regulations, policies, and procedures of the state school construction funding allocation process. Erickson-Hall has attended countless meetings in support of numerous school districts and interacted with various allocation funding distributions and policy enhancements.
 - » **Practical Application** - Because Erickson-Hall is a regular attendee of SAB meetings, our teams stay abreast of pertinent information to share with our clients when applicable to their program, design, and construction development projects.
- **California Department of Education (CDE)** is responsible for the review and approval of school sites and construction plans (new construction and modernization). CDE governance is primarily focused on the educational adequacy of the proposed facility and its conformance with Title 5 guidelines. Erickson-Hall’s construction teams are experienced working with CDE members through the general approval process and through the C.A.S.H. School Facilities Leadership Academy. We understand the need for CDE standards and guidelines for facilities, programs, and outdoor site provisions in order to ensure appropriate school housing and learning environments for students, teachers and administrators throughout California.

ERICKSON-HALL

ASSISTING DISTRICTS SECURE STATE FUNDING

Erickson-Hall offers extensive experience assisting California school districts with their submission for OPSC/SAB district eligibility and project applications. Our estimators and construction managers provide detailed cost estimates that adhere to School Facility Program (SFP) guidelines. These estimates serve as a “second set of eyes” to compare/contrast with the estimates provided by Districts architects. We serve as a District resource for determination of the 60 percent threshold of the plans and specifications, the catalyst for submission of formal requests for funds to be released in accordance with SAB 50-04 Application for Funding.

We have assisted District clients maximize funding opportunities for new construction, modernization, Career-Tech Education (CTE), Overcrowded Relief Grant (ORG), and many other grants.

“Khary Knowles, Erickson-Hall’s Program Manager and Team Leader, stays abreast on the ever-changing laws and guidelines of obtaining State agency funding. His knowledge of the process, timing, and political nature of the various State agencies involved with California school construction has complemented my work as a funding consultant to secure various State funds for our shared Client.”

Betty Hanson, Ed.D
J.E. School Consulting

- **Office of Public School Construction (OPSC)** administers and implements regulations, policies, and procedures for upwards of \$35 billion worth of state funding allocation through the School Facilities Program (SFP). This agency determines funding eligibility of the SFP and also coordinates to obtain action from the SAB regarding the various funding and policy proposals. OPSC has assisted school districts in facilities construction in the recent past through the “Priority Funding” regulations. This allows school districts to apply for funding determinant upon need factors such as lack of local funds and poverty level.
 - » **Practical Application** - Erickson-Hall has worked with various members of OPSC and school districts to maximize funding opportunities for our clients through new construction, modernization, Career-Tech Education (CTE), Overcrowded Relief Grant (ORG), and many other grants. We ensure our staff is constantly aware of the ever-changing opportunities in grant programs from seismic relief to sustainability and high performance grants.

- **Division of the State Architect (DSA)** provides design and construction oversight for K-12 schools and community colleges. DSA is responsible for developing accessibility, structural safety, fire and life safety, and historical building codes and standards utilized in California school construction. Erickson-Hall’s team members have been managing and constructing projects through DSA for over 30 years. Members of our office have interacted with DSA in all of the major facets of the process, such as Program Manager, Architect, Construction Manager, General Contractor and Owner. Working and coordinating with over 30 different entities on a single project has developed our understanding of varying perspectives, agendas and goals in school construction.
 - » **Practical Application** - This comprehensive understanding has positioned Erickson-Hall as a leader in efficient project completions because of our ability to anticipate issues, solve problems and resolve conflicts. Our clients rely on us to bring our experience and objective abilities to their projects to ensure successful completions.
 - Example - Rowland Unified School District decided to convert a junior high school into a K-8 academy after DSA approval of the modernization plans.
 - Erickson-Hall managed the process between the architect and District by providing options and coordinating meetings with DSA to create a Phase 2 Alternate to the existing set of plans.
 - Erickson-Hall researched and recognized that lack of closeout of a previous project would negatively impact the new project if a timely close-out did not occur. Our team coordinated the close-out of the previous project with a different architect in order to start the new project in time for summer construction.

- **Federal OSHA and Cal-OSHA** have established regulations focused on assisting companies like Erickson-Hall ensure safe and healthful work environments for our work force. In February of 2011 Erickson-Hall partnered with Cal-OSHA Consultation Services to execute a complete review of our company’s safety program, as well as conduct a jobsite evaluation. Zero hazards were observed at the site evaluation.
 - » **Practical Application** - Erickson-Hall was recognized as a “Golden Gate Partner,” having developed and implemented an effective, comprehensive safety program. We appreciate the valuable resources provided by OSHA and are committed to ensuring every jobsite provides a healthy, safe work environment for all of our team members.



***Hesperia Junior High School
Hesperia Unified School District***

***A \$5.5 Million Modernization on
an occupied junior high school
campus.***



- **Department of Toxic Substances Control School Property Evaluation and Cleanup Division** is responsible for assessing, investigating and cleaning up proposed school sites. The Division ensures that selected properties are free of contamination or, if the properties were previously contaminated, that they have been cleaned up to a level that protects the students and staff who will occupy the new school. All proposed school sites that will receive State funding for acquisition or construction are required to go through a rigorous environmental review and cleanup process under DTSC's oversight. School districts conduct environmental assessments to provide basic information for determining if there has been a release of hazardous material at the sites, or if a naturally occurring hazardous material that presents a risk to human health or the environment may be present. Through the environmental review process, DTSC ensures protection of children, staff and the environment from the potential effects of exposure to hazardous materials.
- **California Department of Industrial Relations** requires general contractors and major trade contractors to maintain an active registration to be eligible to provide contracting services on public projects. Contractors must meet the following specific requirements in order to maintain an active registration:
 - » Have workers' compensation coverage for any employees and only use subcontractors who are registered public works contractors.
 - » Have Contractors State License Board license if applicable to trade.
 - » Not have any delinquent unpaid wage or penalty assessments owed to any employee or enforcement agency.
 - » Not be under federal or state debarment.
 - » Not be in prior violation of this registration requirement once it becomes effective. However, for the first violation in a 12-month period, a contractor may still qualify for registration by paying an additional penalty.

EXPERIENCE WITH NEWPORT-MESA UNIFIED SCHOOL DISTRICT - PAST 3 YEARS

Erickson-Hall has completed only one project for Newport-Mesa Unified School District; year of completion was outside of the three year window specified in RFQ documents; however, we have listed that project below for District review.

COSTA MESA HIGH SCHOOL MUSTANGS FIELD - 2650 Fairview Road, Costa Mesa, CA 92626

- **District Representative:** Ara Zareczny
- **Contract Value:** \$6,207,112
- **Completion:** August 2016
- **Project Description:**
Construction of a new 2,641 SF building housing restrooms, ticketing, concessions, and an electrical/data room; a 1,265 SF building housing a storage room and electrical yard; and associated site work encompassing fencing, synthetic field subdrainage system, track surface asphalt paving, landscaping, and various track and field equipment.
- **Delivery Method:** Design-Bid-Build

PROJECT & COST MANAGEMENT




Newport-Mesa
Unified School District

PROPOSAL TO PROVIDE CONSTRUCTION MANAGEMENT SERVICES

NEWPORT-MESA UNIFIED SCHOOL DISTRICT



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PROJECT & COST MANAGEMENT

- **Project Staffing** - The size and complexity of each project will determine staffing requirements to ensure a well-coordinated project with excellent cost and schedule control. For projects with a value of \$20 million or more, our standard project team would consist of the positions listed below. For projects with construction values under \$20 million, our project manager, project engineer and superintendent would be at 1/2 time and our project executive oversight would be at 2 hours per week.

POSITION	HOURLY RATE
» Project Executive	\$155
» Project Manager	\$137
» Senior Estimator	\$137
» Project Engineer	\$117
» Superintendent	\$137
» Admin Assistant	\$ 72

- **Scheduling | Meeting Timeline Goals** - Our Construction Management Team will use Microsoft Project scheduling software and is experienced with developing detailed project schedules. We will produce project schedules with timelines established in two ways: by phases of the project and by consultant tasks within those phases. Special attention will be placed (critical path milestones) on state agency deadlines such as DSA, CDE, DTSC and OPSC/SAB. The schedule will be developed with input from the design team, major trades and the District. If required, project phasing and early material procurement will be considered. Regular updates will be performed to evaluate actual performance against the baseline schedule. If delays are encountered, routine updates will provide early notice allowing implementation of contingency plans and the ability to implement a fast-track schedule. Web-based Procore project management software will allow project stakeholders to access logs, transmittals, submittals and related project documentation from any site with Internet capability.
 - » **Pull Planning** - In order to fully utilize the effectiveness of our Construction Management Team, Erickson-Hall will coordinate Pull Planning Sessions with contractors and will update the pull planning schedule weekly, as well as produce two-month look ahead schedules to ensure all contractors are on target for achieving milestone goals. Daily huddles will be held with contractor foremen to ensure everyone is on track to achieve milestone goals. Pull Planning is a commitment-based planning system where all team members continuously concentrate on eliminating waste and maximizing value by focusing on time. Every milestone and construction operation activity, from preconstruction through closeout, will be reviewed. Time commitments will be made by the trades. Commitments will be continually updated and unforeseen impacts overcome, as the team works toward the common goal of on time, on budget completion.
- **Computer Project Management | Scheduling | Electronic Design** - Erickson-Hall utilizes Web-based Procore project management software allowing project stakeholders real time access to live documents, such as logs, transmittals, submittals, shop drawings and related project documentation from any site with Internet capability. Microsoft Project is the scheduling software that will be used by our team. If desired, Erickson-Hall's BIM Coordinator will perform comprehensive BIM constructability reviews. BIM, a 3-dimensional computer modeling tool, presents relevant project information embedded into the model from materials and specifications to costs and scheduling. Through a process of "Clash Detection", BIM will facilitate the risk level or "problem discovery" operations to move closer to the beginning of projects where time delays and revisions are more cost effective to the project. Cost allowances will be provided in the budget for design elements that are either incomplete or missing from the plans. The allowances and constructability review RFI list will help to guide the construction documents toward a higher quality level and will result in fewer construction-phase RFIs and will reduce or eliminate change orders.

Critical to Erickson-Hall's success as your Construction Manager will be our ability to improve the quality of construction documents while maximizing the District's construction dollars and ensuring on time/on budget project completion. We will accomplish this goal by holding regular design coordination meetings to review and coordinate plan development against the backdrop of a series of progressively more detailed budgets and constructability reviews. The budgets and constructability reviews will serve the District and design team in making more informed decisions based on progressively more detailed cost data throughout the design process. Through a highly interactive team environment, we will work together to deliver budget-conscious designs for each phase that maximize the District's construction dollars while improving the overall quality of the project. This process involves the following components:

- » **Verification of Existing Conditions** - Erickson-Hall will conduct site evaluations to understand and verify existing site conditions, existing facilities, systems, surrounding environment, soil and terrain. Our team will visit the site and document, to the best of our ability, the actual conditions in the field to ensure that the design takes existing conditions into account. Through in-house Building Information Modeling (BIM) resources, we have the ability to model the conditions in three dimensions, locate sub-grade utility lines, as well as review any existing facilities for hazardous materials.

- » **Submittal/Shop Drawings/RFI**s - Erickson-Hall will review all submittals, shop drawings and RFIs for accuracy and conformance with contract documents prior to passing them on to the design team. When necessary, we will suggest and require mock-ups be included in specifications to ensure desired standards are achieved. Our Superintendent will perform “pre-inspections” when contractors submit Inspection Requests to assure that each item is indeed ready for Inspection. This pre-inspection procedure will also be included in Scheduling Pull Planning sessions.
- » **Project Examples**
 - **Monte Vista High School Buildings & Gymnasium Modernization - December 2015 - \$7.7 Million**
Grossmont Union High School District - Lease-Leaseback Delivery
 Erickson-Hall provided comprehensive preconstruction and construction phase services for the delivery for the modernization of three buildings encompassing band/choral classrooms, kitchen and food service facilities, computer classrooms, auto shop and metal works classrooms, and gymnasium. Site improvements include ADA upgrades and parking lot replacement.
 - **Aggressive Scheduling** - The original 14-week schedule for a three building modernization was split into a two phase project to accommodate interim housing. Phase 1 (11 weeks) included the modernization of buildings 700, 800A, and parking lot. Phase 2 (13 weeks) included the modernization of building 800 and landscaping throughout the entire project. During phase 1, the overall schedule for the completion of the buildings was compressed by three weeks to allow students to move back into their classrooms as early as possible. In addition, parking lot improvements including repaving, mass grading, new concrete curbs, site lighting, and storm drain improvements, were completed in 5 weeks. Phase 2 included the modernization of building 800 which housed the weight room, ASB rooms, and the electrical and data computer labs. The building also included significant structural modifications due to the age of the building and requirements for new HVAC package units. Our team approached both phases with targeted scheduling meetings with all trades. Utilizing pull planning scheduling, our team was able to identify critical scheduling areas and refine our approach to the project in order to make adjustments to manpower and procurement in order to meet the District's schedule.
 - **San Dieguito Academy Arts & Humanities Building - August 2019 - \$20.9 Million**
San Dieguito Union High School District - CM Multiple-Prime Delivery
 Erickson-Hall provided preconstruction and construction phase services for the delivery of a 59,000 SF, two-story, split level classroom building.
 - **Time and Cost Saving Activities** – The English Arts project was a fast track project, which resulted in a phased bid process in order to begin the BIM process enabling the team to identify possible design savings and potential utility conflicts that could impact the project. During preconstruction and the constructability phase, the project team focused on bidding the first phase BIM scopes, which included the Structural, Mechanical, Electrical, Plumbing, and Fire Suppression bid packages enabling the BIM process to begin prior to the construction start date. During the BIM process, it was discovered that by modifying the routing of the mechanical equipment and ductwork, MEP clashes could be avoided. The layout and routing modifications were implemented and all potential critical path timeline delays were avoided. The early BIM process streamlined all critical MEP installations and the project was delivered on-time as scheduled.
 - **Cost Saving Activity** – During construction, the construction management team continued to investigate Value Engineering (VE) options to present to the District for consideration. The team requested from the prime contractors that they investigate their scope and provide suggestions for potential VE options. Three viable options were presented by the prime contractors, which included the following:
 - **Plumbing Savings** - The specified sewer material was cast iron. The plumbing contractor presented the VE option to revise the material from cast iron to schedule 40 PVC piping. The VE option was presented to the District and since the schedule 40 PVC piping did not modify the function or quality of the project, the District accepted the VE option resulting in a cost savings of \$6,400.
 - **Electrical Savings** – Through the BIM process it was determined that the specified low voltage cable tray was clashing with other utilities. It was suggested by the electrical prime contractor and the District IT personnel to provide J hooks in lieu of the specified cable tray, which resulted not only in addressing the routing challenges, but also resulted in a cost savings to the District of \$10,581. **Electrical Savings** – As a result of the VE investigation, the electrical prime contractor suggested as a VE option to revise the branch circuits in the classrooms and lighting whips from EMT/wire to MC cabling. The electrical consultant and District reviewed the proposal and approved the suggestion resulting in an \$8,700 savings.

SUBCONSULTANTS




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Unified School District

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NEWPORT-MESA UNIFIED SCHOOL DISTRICT



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SUBCONSULTANTS

Erickson-Hall will provide all construction management services with seasoned in-house construction professionals.

REFERENCES




Newport-Mesa
Unified School District

PROPOSAL TO PROVIDE CONSTRUCTION MANAGEMENT SERVICES

NEWPORT-MESA UNIFIED SCHOOL DISTRICT



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**DENA JOHNSON, PROJECT MANAGER
GROSSMONT UNION HIGH SCHOOL DISTRICT**

1100 Murray Drive
El Cajon, CA 92020
619.644.8150
dajohnson@guhsd.net

Erickson-Hall has been serving as a construction manager for Grossmont Union High School District since 2004 and has managed more than \$200 million of new construction and modernization projects. Mat Gates, Vice President, began his career at Erickson-Hall as a construction manager and team leader for our work at Grossmont Union High School District. The majority of our work has involved managing CM Multiple Prime and Agency CM deliveries, as well as a few lease-leaseback projects. A brief list of construction management projects include:

- Mount Miguel Bleacher Replacement - \$2 Million - Completion 2020
- Grossmont High School Event Center - \$18 Million - Completion 2020
- Chaparral High School Classroom/Administration Building Reconstruction - \$3.5 Million - Completion 2017
- Granite Hills High School Building 200 - \$12 Million - Completion 2012

**NANCY NIEN, ASSISTANT SUPERINTENDENT
(Former Assistant Superintendent, Business at Los Alamitos Unified School District)
ANAHEIM UNION HIGH SCHOOL DISTRICT**

510 Crescent Way
Anaheim, CA 92803
714.999.3555
nien_n@auhsd.us

Erickson-Hall provided comprehensive preconstruction services and is currently underway on the construction of the Los Alamitos High School STEM Building, a \$57 million dollar classroom building. Mat Gates, Vice President, and Justin Sinnott, Project Executive, and Edgar Mendoza are all key members of this project team.

**JOHN ADDLEMAN, EXECUTIVE DIRECTOR PLANNING
SAN DIEGUITO UNION HIGH SCHOOL DISTRICT**

710 Encinitas Boulevard
Encinitas, CA 92024
760.753.6491
john.addleman@sduhsd.net

Erickson-Hall has served as a construction manager or lease-leaseback contractor for the San Dieguito Union High School District since 2014. A brief list of construction management projects include:

- San Dieguito Academy Math & Science Classroom - \$14 Million - Completion 2017
- Diegueno Middle School New Classroom Building P | Modernization of Buildings B&G - \$8.5 Million - Completion 2019
- San Dieguito Academy Culinary Arts Classroom Modernization - \$2 Million - Completion 2017

LEGAL ISSUES




Newport-Mesa
Unified School District

PROPOSAL TO PROVIDE CONSTRUCTION MANAGEMENT SERVICES

NEWPORT-MESA UNIFIED SCHOOL DISTRICT



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LEGAL ISSUES

- There is no pending legal action against Erickson-Hall or any employee of the firm alleging violations of the law in connection with an offering of municipal securities in a California transaction.
- There have been no settlements or judgments involving such actions within the last five (5) years.
- There have been no judgments, settlements, or arbitration awards valued at \$5,000 or greater relating to a civil action judgment, settlement, arbitration award, or administrative action for any individual licensee, as required to be reported to the State of California.

FEES




Newport-Mesa
Unified School District

PROPOSAL TO PROVIDE CONSTRUCTION MANAGEMENT SERVICES NEWPORT-MESA UNIFIED SCHOOL DISTRICT



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FEES

Erickson-Hall proposes to provide construction management services to Newport-Mesa Unified School District in accordance with the fee scale and hourly rates provided below.

FEE: CM MULTIPLE PRIME | AGENCY CM

- \$1.0M or Less.....4.75%
- \$1.0M to \$5.0M.....3.75%
- \$5.0M to \$25.0M.....3.25%
- \$25.0M to \$50.0 M.....3.00%
- Over \$50.0M.....2.75%

HOURLY RATES

- | | |
|--|--------|
| • Project Executive/Director | \$ 155 |
| • Construction Manager | \$ 147 |
| • Project Manager | \$ 137 |
| • Preconstruction Manager | \$ 137 |
| • Assistant Project Manager/Project Engineer | \$ 117 |
| • Superintendent | \$ 137 |
| • Assistant Superintendent | \$ 117 |
| • Constructability Reviewer | \$ 127 |
| • Sr. Estimator | \$ 137 |
| • Estimator | \$ 127 |
| • BIM Manager | \$ 137 |
| • Scheduler | \$ 127 |
| • Administration | \$ 72 |

FORMS




Newport-Mesa
Unified School District

PROPOSAL TO PROVIDE CONSTRUCTION MANAGEMENT SERVICES

NEWPORT-MESA UNIFIED SCHOOL DISTRICT



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ATTACHMENT B

CERTIFICATION – REQUEST FOR QUALIFICATIONS

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



Signature

Chief Executive Officer

Title

500 Corporate Drive

Address

760.796.7700

Telephone

February 21, 2021

Date

David Erickson

Typed or Printed Name

Erickson-Hall Construction Co.

Company

Escondido, CA 92029

Address

760.796.7750

Fax

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

ATTACHMENT C

STATEMENT OF EXPERIENCE AND FINANCIAL CONDITION

Company Name: Erickson-Hall Construction Co.

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

Address: 500 Corporate Drive
Escondido, CA 92029

Telephone/FAX#: 760.796.7700 o 760.796.7750 f

Date and State of Formation/Incorporation: May 1, 1998

Is the company authorized to do business in California? Yes

Basis of Authorization: ☒ California Corporation ^{C2038936} ☐ California Business License
☐ California Engineering License ☒ Other (specify)
CA Contractor License 751343

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

Address: N/A

FINANCIAL INFORMATION

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

	<u>2017</u>	<u>2018</u>	<u>2019</u>
California:	<u>\$128,318,196</u>	<u>175,533,677</u>	<u>143,641,422</u>
Total:	<u>\$128,318,196</u>	<u>175,533,677</u>	<u>143,641,422</u>

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

Los Alamitos High School STEM Building - \$57 Million - Los Alamitos Unified School District

ATTACHMENT D

ANSWER THE FOLLOWING QUESTIONS

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

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

SIGNATURE:

NAME:

TITLE:



David Erickson

Chief Executive Officer, Erickson-Hall Construction Co.

ATTACHMENT E

PROJECT REFERENCE FORM

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

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

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

Erickson-Hall's Project Reference information is provided immediately following this page.



TYPE OF CONTRACT	PROJECT NAME & LOCATION	OWNER	CONSTRUCTION START DATE	CONSTRUCTION COMPLETION DATE	ORIGINAL CONTRACT COST	FINAL CONTRACT COST	CAUSE OF VARIANCE	PROJECT DESCRIPTION
CM Multiple-Prime	Pioneer Middle School Gym & Locker Room Renovation 2700 Pioneer Road Tustin, CA 92782	Tustin Unified School District David Miranda, Sr. Director M&O 714.730.7515 300 South C Street, Tustin, CA 92780	August - 2016	May - 2017	\$3,019,560	\$3,264,215	Variance due to unforeseen layout measurements and DSA plan approval comments after bid.	Modernization of an existing gym and locker room building encompassing interior demolition and expansion with HVAC and fixture upgrades.
CM Multiple-Prime	Cross Elementary School 2462 Cross Road Imperial, CA 92251	Imperial Unified School District Bryan Thomason, Superintendent 760.355.3200 219 North E St., Imperial, CA 92251	October - 2017	May - 2019	\$28,284,568	\$32,763,509	Plan corrections and additions. Architectural modifications, some of which was Owner generated.	New 60,000 SF elementary school campus consisting of 5 single story classroom buildings, administration building and a multi-purpose building, 3 parking lots, multi-use courtyard and associated street improvements and site work.
CM Multiple-Prime	San Dieguito Academy Arts & Humanities Building 800 Santa Fe Drive Encinitas, CA 92024	San Dieguito Union High School District John Addleman, Executive Director, Planning, 760.753.6491 710 Encinitas Blvd., Encinitas, CA 92024	February - 2018	August - 2019	\$21,458,055	\$20,920,671	Unused Contingencies Returned to District	Construction of a new 59,000 SF English Arts (ESA) building and associated landscaping and site work.
CM Multiple-Prime	Canyon Springs High School Athletic Complex 23100 Cougar Canyon Road Moreno Valley, CA 92557	Moreno Valley Unified School District Jorge Alvarado, Facilities Planner 951.571.7690 25634 Alessandro Blvd. Moreno Valley, CA 92553	May - 2017	June - 2018	\$15,267,200	\$16,027,418	District Additions to Scope	Construction of a new stadium/athletic complex to include a new Home & Visitor bleachers, all weather track and field, new support buildings, relocation of tennis courts, and renovation of existing ball fields.
CM Multiple-Prime	San Dieguito Academy Math & Science Classroom 800 Santa Fe Drive Encinitas, CA 92024	San Dieguito Union High School District John Addleman, Executive Director, Planning, 760.753.6491 710 Encinitas Blvd., Encinitas, CA 92024	November - 2015	July - 2017	\$14,200,811	\$14,303,176	Reinstall monument sign, add water main, relocate fire line service, and revision of planting plan and walkways.	Demolition of 3 buildings, re-routing of site utilities, and construction of a new 2-story, 30,000 SF Math & Science Building with associated site work.
CM Multiple-Prime	Orange Vista High School Gymnasium 1400 E. Orange Avenue Perris, CA 92571	Val Verde Unified School District Stacy Strawderman, Dir. Facilities & Purchasing, 951.940.6136 975 W. Morgan St., Perris, CA 92571	December - 2015	May - 2017	\$12,587,725	\$13,041,335	Additional costs due to unforeseen costs and Owner requested scope changes	New gymnasium building housing volleyball/basketball main court and several practice courts, bleachers, weight room, wrestling room, training rooms, locker rooms, & lobby.
CM Multiple-Prime	Mt. Miguel High School Student Support Services 8585 Blossom Lane Spring Valley, CA 91977	Grossmont Union High School District Dena Johnson, Project Manager 619.644.8150 1100 Murray Dr., La Mesa, CA 92020	July - 2017	April - 2019	\$10,488,233	\$11,779,131	Construction increases included Helix Water Re design, Makers space equipment, unsuitable soil mitigation, and re-design/furnishing of new makers space.	Demolition of existing building and construction of a new Student Support Services and Event Center. Site work included parking and street improvements.
CM Multiple-Prime	Vista Murrieta High School CTE Classroom Buildings 28251 Clinton Keith Road Murrieta, CA 92563	Murrieta Valley Unified School District William Olien, Deputy Superintendent 951.696.1600 41870 McAlby Court, Murrieta, CA 92562	June - 2017	August - 2018	\$11,549,863	\$11,709,435	District Additions to Scope	Construction of a two new CTE classroom buildings and associated site improvements.
CM Multiple-Prime	Margarita Middle School & Chaparral High School Summer 2016 Modernization (Multiple Projects Located in Temecula, CA)	Temecula Valley Unified School District Janet Dixon, Director of Facilities Development, 951.506.7914 31350 Rancho Vista Way Temecula, CA 92592	June - 2016	May - 2017	\$9,590,317	\$8,863,519	Unused Contingencies Returned to District	Various site improvements and campus renovations at 2 school campuses encompassing replacement of HVAC, lighting and energy management systems, exterior/site ADA upgrades, painting, marquee signs and lockers.
CM Multiple-Prime	Heber Jr. High School Gymnasium 1052 Heber Avenue Heber, CA 92249	Heber Elementary School District Mike Dickerson, M&O Supervisor 760.337.6530 1052 Heber Avenue, Heber, CA 92249	November - 2017	October - 2018	\$7,316,779	\$8,353,792	Deferred DSA truss approval and subsequent production delayed the project an extra 2 months. Owner elected to add a parking lot to the project.	New gymnasium housing telescoping bleachers, girls/boys locker rooms, restrooms, coach offices, two classrooms, ticket booth and storage rooms.
CM Multiple-Prime	Oak Crest Middle School Science Building 675 Balour Drive Encinitas, CA 92024	San Dieguito Union High School District John Addleman, Executive Director, Planning, 760.753.6491 710 Encinitas Blvd., Encinitas, CA 92024	June - 2017	August - 2018	\$9,639,890	\$7,825,604	Contract includes base bid + Alts 1-4 and allowances	Demolition of existing building and construction of a new 13,739 SF Science Building. Scope includes interim housing utilities, demolition and replacement of Building F, repaving of basketball courts, and installation admin portable.
CM Multiple-Prime	Carmel Valley Middle School 3800 Mykonos Lane San Diego, CA 92130	San Dieguito Union High School District John Addleman, Executive Director, Planning, 760.753.6491 710 Encinitas Blvd., Encinitas, CA 92024	June - 2017	May - 2018	\$4,658,939	\$6,545,428	This was due to unforeseen conditions and owner changes throughout the course of the multi-phase projects.	Renovation of existing Drama and Performing Arts Center, and new construction of a Music Building.



TYPE OF CONTRACT	PROJECT NAME & LOCATION	OWNER	CONSTRUCTION START DATE	CONSTRUCTION COMPLETION DATE	ORIGINAL CONTRACT COST	FINAL CONTRACT COST	CAUSE OF VARIANCE	PROJECT DESCRIPTION
CM Multiple-Prime	Corfman Middle School Gymnasium 701 W. McCabe Road El Centro, CA 92243	McCabe Union Elementary School District Laura Dubbe, Superintendent 760.335.5200 701 W. McCabe Rd, El Centro, CA 92243	July - 2016	May - 2017	\$5,500,000	\$5,842,585	ADA/project required changes and owner requested changes to add stainless steel counters and shelving in the ticket booth.	Construction of an 18,000 SF gymnasium housing boys & girls locker rooms, 2 coach offices with separate restrooms, gang restrooms, 2 classrooms, telescoping bleachers, & scoreboards.
CM Multiple-Prime	Vail Ranch Middle School 33340 Camino Piedra Rojo Temecula, CA 92592	Temecula Valley Unified School District Janet Dixon, Director of Facilities Development, 951.506.7914 31350 Rancho Vista Way Temecula, CA 92592	May - 2019	August - 2019	\$6,120,054	\$5,826,000	Unused Contingencies Returned to District	The scope of work included the following: security modifications at interior/exterior gates and selected exterior doors/windows, landscaping and site improvements.
CM Multiple-Prime	Temecula Middle School Modernization	Temecula Valley Unified School District Janet Dixon, Director of Facilities Development, 951.506.7914 31350 Rancho Vista Way Temecula, CA 92592	June - 2018	August - 2018	\$4,940,617	\$4,469,831	Unused Contingencies Returned to District	Modernization of middle school campus encompassing new flooring, restroom upgrades, HVAC upgrades, roof upgrades, new fire alarm, ADA drop off area and parking lot improvements.
CM Multiple-Prime	Alberhill Elementary School 4170 Brianna Circle Lake Elsinore, CA 92530	Lake Elsinore Unified School District Greg Bowers, Asst. Superintendent 951.253.7015 545 Chaney Street Lake Elsinore, CA 92530	June - 2019	July - 2020	\$27,465,220	\$27,244,065	Lost 26 working days due to rain and effects of rain	Alberhill Elementary School project is a ground up elementary school with site improvements, buildings, and offsite street improvements.
CM Multiple-Prime	Jefferson Elementary School 4285 Jefferson Street Riverside, CA 92504	Riverside Unified School District Eric Walker, Assistant Director Facilities Projects, 951.788.7496 ext. 84705 3380 14th Street, Riverside, CA 92501	June - 2019	October - 2020	\$13,222,170	\$14,987,956	Due to District/Architect additions to scope which included, but is not limited to: relocating permanent portable classrooms, storage removal, ceiling upgrades, new carpet, additional flatwork, electrical upgrades, etc.	Construction of new single story Kindergarten Classroom Building G; Alteration of 11 existing Buildings; Alteration of existing Portable Classroom Buildings and related site work along the path of travel.
CM Multiple-Prime	Grossmont High School Event Center 1100 Murray Drive La Mesa, CA 92020	Grossmont Union High School District Dena Johnson, Project Manager 619.644.8150 1100 Murray Dr., La Mesa, CA 92020	January - 2019	September - 2020	\$17,529,173	\$18,004,795	District added to scope including upgrading the old gym, changing curtain wall and flashings, upgrades to storage room addition of a lagrer canopy and upgraded finishes.	The new 26,670 gross square feet Event Center will provide a state-of-the-art facility for campus events, performances, and other activities.
CM Multiple-Prime	El Monte High School 1001 Durfee Avenue South El Monte, CA 91733	El Monte Union High School District Norma Macias, Director of Facilities, M&O 626.444.9005 3537 Johnson Ave., El Monte, CA 91731	June - 2019	December - 2020	\$6,087,100	\$5,882,600	Unused Contingencies Returned to District	Phase 1: HVAC replacemnt across 6 sites. Phase 2: Modernization of Mountain View High School
Lease-Leaseback	Savanna High School Modernization 301 North Gilbert Street Anaheim, CA 92801	Anaheim Union High School District Elizabeth Novack, Superintendent 714.808.9090 510 Crescent Way, Anaheim, CA 92803	May - 2018	July - 2019	\$5,162,549	\$20,596,946	District added Increment 3 and Increment 4 to project scope.	Modernization of gymnasium & locker rooms & various site improvements including parking lot, underground utilities, landscaping, security fencing, street improvements & tennis court surfacing.
Lease-Leaseback	Sandra Sanchez Thorstenson Stadium at California High School 9800 Mills Avenue Whittier, CA 90604	Whittier Union High School District Martin Plourde, Superintendent 562.698.8121 9401 S. Painter Ave., Whittier, CA 90605	June - 2015	August - 2016	\$20,334,623	\$20,479,419	Unforeseen existing conditions	Construction of a new Fieldhouse and 5,000-seat Grandstands with elevator access. The stadium features a pedestrian entrance plaza and monument sign.
Lease-Leaseback	Riley Elementary School HVAC Upgrades 3319 Sandwood Street Lakewood, CA 90712	Long Beach Unified School District Vince Marchetti, Director Maintenance 562.997.8000 1515 Hughes Way, Long Beach, CA 90810	January - 2018	January - 2019	\$13,060,607	\$11,844,096	Unused Contingencies Returned to District	Campus-wide upgrade of the school's HVAC system. Scope includes removal of existing classroom ceilings and the installation of new acoustical ceilings and drywall ceilings in corridors.
Lease-Leaseback	Cleveland Elementary School HVAC Upgrades 4760 Hackett Avenue Lakewood, CA 90713	Long Beach Unified School District Vince Marchetti, Director Maintenance 562.997.8000 1515 Hughes Way, Long Beach, CA 90810	January - 2018	January - 2019	\$12,257,034	\$11,426,704	Unused Contingencies Returned to District	Campus-wide modernization of HVAC system. Work scope includes partial demolition, new finishes, fixtures, t-grid ceiling, windows, as well as site ADA upgrades.
Lease-Leaseback	McKinley Elementary School HVAC Upgrades 6822 Paramount Blvd Long Beach, CA 90805	Long Beach Unified School District Vince Marchetti, Director Maintenance 562.997.8000 1515 Hughes Way, Long Beach, CA 90810	June - 2018	June - 2019	\$10,473,210	\$11,000,000	Distirct Additions to Scope	Campus wide HVAC upgrades, partial demolition, new finishes, fixtures, T-grid ceilings, windows, ADA required upgrades and student drop-off area.





TYPE OF CONTRACT	PROJECT NAME & LOCATION	OWNER	CONSTRUCTION START DATE	CONSTRUCTION COMPLETION DATE	ORIGINAL CONTRACT COST	FINAL CONTRACT COST	CAUSE OF VARIANCE	PROJECT DESCRIPTION
Lease-Leaseback	MacArthur Elementary School HVAC Upgrades 6011 Centralia Avenue Long Beach, CA 90713	Long Beach Unified School District Vince Marchetti, Director Maintenance 562.997.8000 1515 Hughes Way, Long Beach, CA 90810	June - 2018	August - 2019	\$8,617,488	\$12,285,953	District added to scope included various lengths of map rails throughout the classrooms & building corridors, additional tack & marker boards, fire alarm devices, etc.	Campus-wide HVAC installation, as well as various site upgrades including utility service, technology, interior/exterior finishes, lighting, & ADA required upgrades.
Lease-Leaseback	Sato Academy 1100 Iroquois Avenue Long Beach, CA 90815	Long Beach Unified School District Vince Marchetti, Director Maintenance 562.997.8000 1515 Hughes Way, Long Beach, CA 90810	June - 2018	October - 2019	\$18,841,796	\$16,498,257	Credit of unused contingencies including additional deductive value engineering changes.	Construction of a new 34,565 SF classroom building housing science classrooms, regular classrooms, Career Technical Education (CTE) classrooms, restrooms and storage rooms.
Lease-Leaseback	La Serna High School Athletic Field 15301 Youngwood Drive Whittier, CA 90605	Whittier Union High School District Martin Plourde, Superintendent 562.698.8121 9401 S. Painter Ave., Whittier, CA 90605	May - 2017	April - 2018	\$9,864,049	\$9,811,340	Unused contingency funds returned to District. 60-day time extension due to scope addition of softball storm drain, revised over-ex and re-compaction requirements at retaining walls, irrigation re-design, and backfill and grading changes to fields.	16-acre athletic complex encompassing a new 50,000 SF synthetic track, 2 softball fields, 2 baseball fields, 4 batting cages, dugouts, 8 tennis courts, bleachers and soccer field.
Lease-Leaseback	Oxford Academy 5172 Orange Avenue Cypress, CA 90630	Anaheim Union High School District Elizabeth Novack, Superintendent 714.808.9090 510 Crescent Way, Anaheim, CA 92803	May - 2018	September - 2019	\$8,774,780	\$9,354,282	81 design changes	Construction of a new 6,500 SF Music Building, conversion of existing building into two STEAM classrooms and workshop, conversion of existing band building into a library, new shop yard enclosure, & courtyard modernization.
Lease-Leaseback	Rancho Verde High School 17750 Lasselle Street Moreno Valley, CA 92551	Val Verde Unified School District Stacy Strawderman, Dir. Facilities & Purchasing, 951.940.6136 975 W. Morgan St., Perris, CA 92571	June - 2019	December - 2020	\$26,338,102	\$26,300,000	Unused Contingencies Returned to District	Scope of work entails various site improvements, ADA site improvements, new parking lot, new restroom building, add bleachers, new scoreboards, new dugouts, & new fire alarm.
Lease-Leaseback	Innovative Horizons Charter School - Phase 1 1461 North A Street Perris, CA 92570	Perris Elementary School District Victor Guzman, Director, Maintenance & Operations, 951.657.3118 143 E. 1st Street, Perris, CA 92570	June - 2019	August - 2020	\$22,100,000	\$22,148,318	We had 4 weeks of rain delays, COVID-related delays (which include shortages of manpower and material), and several delays due to incomplete designs by the architect.	Construction of a 13,674 SF, 2-story classroom building, a 1,961 SF single story locker room building, and a 20,304 SF gymnasium.
Lease-Leaseback	Valley Middle School PE Building 1645 Magnolia Avenue Carlsbad, CA 92008	Carlsbad Unified School District Chris Wright, Assistant Superintendent Business, 760.331.5036 6225 El Camino Real, Carlsbad, CA 92009	August - 2016	July - 2017	\$4,292,336	\$4,411,761	Owner requested scope changes to add exterior painting.	Demolition and abatement of an existing building and construction of a new 8,800 SF building housing an exercise room, boys & girls locker rooms and science lab.
Lease-Leaseback	Sage Creek High School Performing Arts Center 3900 Cannon Road Carlsbad, CA 92010	Carlsbad Unified School District Chris Wright, Assistant Superintendent Business, 760.331.5036 6225 El Camino Real, Carlsbad, CA 92009	November - 2016	June - 2018	\$14,986,456	\$15,574,800	Scope additions to include stadium path of travel, rolling gate, added drainage, field modifications and parking lot repairs.	New 17,272 SF Performing Arts Center featuring wood floor stage, black box, dressing rooms and 345 seat auditorium.
Lease-Leaseback	John Adams Elementary School Modernization Phase 2 2350 Border Avenue Corona, CA 92880	Corona-Norco Unified School District Lynne Murray, Construction Manager 951.736.5047 2820 Clark Avenue, Norco, CA 92860	December - 2016	June - 2018	\$13,673,145	\$13,574,714	Unused Contingencies Returned to District	Construction of a new multi-purpose building, kindergarten classroom wing, library/classroom building, remodel/addition of existing admin building, and site improvements.
Lease-Leaseback	Lincoln Alternative Elementary School Phase 2 Improvements 1041 Fullerton Avenue Corona, CA 92879	Corona-Norco Unified School District Lynne Murray, Construction Manager 951.736.5047 2820 Clark Avenue, Norco, CA 92860	February - 2017	May - 2018	\$12,110,792	\$11,857,420	Unused contingency funds returned to District; 35-day time extension due to District scope addition for interim housing and associated site work.	Construction of a new multi-purpose building, administrative/kindergarten classroom wing, parking lot expansion and site improvements.
Lease-Leaseback	Little Lake City School District Restroom Renovation (Various School Sites in Norwalk, CA)	Little Lake City School District William Crean, Superintendent 562.868.8241 10515 Pioneer Blvd Santa Fe Springs, CA 90670	June - 2016	August - 2016	\$3,764,721	\$3,668,082	Unused construction allowance funds returned to Owner.	Restroom upgrades throughout the District's 4 elementary school campuses encompassing the relocation of plumbing fixtures, new partitions, flooring, wall tiles, and ADA required upgrades to include the expansion of the restroom buildings.
Lease-Leaseback	Corona High School Locker Rooms Renovation Project 1150 W. 10th Street Corona, CA 92882	Corona-Norco Unified School District Lynne Murray, Construction Manager 951.736.5047 2820 Clark Avenue, Norco, CA 92860	November - 2018	July - 2019	\$ 3,321,000	\$3,278,428	Unused Contingencies Returned to District	Construction to include demolition; reconfiguration of lockers, faculty office, restrooms/showers; replacement of lighting, interior finishes and doors and windows; modification of fire alarm.





TYPE OF CONTRACT	PROJECT NAME & LOCATION	OWNER	CONSTRUCTION START DATE	CONSTRUCTION COMPLETION DATE	ORIGINAL CONTRACT COST	FINAL CONTRACT COST	CAUSE OF VARIANCE	PROJECT DESCRIPTION
Lease-Leaseback	Lincoln Alternative Elementary School Phase 1 Improvements 1041 Fullerton Avenue Corona, CA 92879	Corona-Norco Unified School District Lynne Murray, Construction Manager 951.736.5047 2820 Clark Avenue, Norco, CA 92860	March - 2016	August - 2016	\$2,897,823	\$3,278,874	Revised grading, site utility and electrical service upgrades and owner requested scope changes and additions.	Demolition of existing administration building, multi-purpose building, metal canopies; rear parking lot expansion; relocation of 3 portable classrooms; and associated site work.
Lease-Leaseback	Richards Center for the Arts at Palm Springs High School 2401 E. Baristo Road Palm Springs, CA 92262	Palm Springs Unified School District Julie Arthur, Exec. Director, Facility Planning, 760.416.6113 980 East Tahquitz Canyon Way Palm Springs, CA 92262	May - 2015	August - 2016	\$14,764,583	\$13,365,969	Unused Contingencies Returned to District	Reconstruction of an existing 20,937 SF building housing a 916-seat theater, 4,129 SF platform/stage, orchestra pit, green room, control room, dressing rooms, ticket booth, restrooms, staff office, and mechanical mezzanine.
Lease-Leaseback	Chaparral High School Tenant Improvements 1600 Cuyamaca Street El Cajon, CA 92020	Grossmont Union High School District Dena Johnson, Project Manager 619.644.8150 1100 Murray Dr., La Mesa, CA 92020	October - 2016	March - 2017	\$3,709,142	\$3,578,704	Unused Contingencies Returned to District	Modernization and reconstruction of the administration and classroom buildings. Scope of work included new interior finishes, HVAC, lighting, exterior finishes, stucco and windows.
Lease-Leaseback	Agua Caliente Elementary School 30800 San Luis Rey Drive Cathedral City, CA 92234	Palm Springs Unified School District Julie Arthur, Exec. Director, Facility Planning, 760.416.6113 980 East Tahquitz Canyon Way Palm Springs, CA 92262	May - 2017	June - 2019	\$39,383,974	\$39,234,429	Unused Contingencies Returned to District	New construction of 5 masonry and steel structure buildings on a 4.5 acre site. Site work includes a parking lot, playground area and underground utilities. Scope includes demolition of existing campus after completion of new facilities.
Lease-Leaseback	La Costa Meadows Elementary School 6889 El Fuerte Street Carlsbad, CA 92009	San Marcos Unified School District Tova Corman, Executive Director 760.290.2650 255 Pico Avenue, #250 San Marcos, CA 92069	June - 2017	August - 2019	\$24,813,972	\$29,151,665	District additions to scope encompassed modernization to the existing administration, library, MPR, kitchen and kindergarten rooms within Building A, as well as construction of a new Kids on Campus classroom (KOC).	Construction of a two building additions to existing campus. Scope includes a 2-story 26,500 SF building, 2-story 30,000 SF building, and extensive site improvements and utility upgrades.
Lease-Leaseback	Bonsall High School Classroom Building 7350 W. Lilac Road Bonsall, CA 92003	Bonsall Unified School District David Medcalf, Director of Maintenance, Facilities, 760.631.5366 31505 Old River Road, Bonsall, CA 92003	June - 2015	August - 2016	\$6,752,000	\$6,508,481	Unused low voltage allowance and contingency funds returned to District	Construction of a new 2-story 18,000 SF building housing 8 learning studios, a chemistry lab, biology lab, collaboration spaces and restrooms.
Lease-Leaseback	Orange Vista High School Building 600 1400 E. Orange Avenue Perris, CA 92571	Val Verde Unified School District Stacy Strawderman, Dir. Facilities & Purchasing, 951.940.6136 975 W. Morgan St., Perris, CA 92571	December - 2016	August - 2017	\$13,282,180	\$12,760,308	Unused Contingencies Returned to District	New 2-story 50,000 SF classroom building housing 36 classrooms, restrooms, elevator, utility room and various support rooms.
Lease-Leaseback	Torrey Pines High School Media Center Phase 1 3710 Del Mar Heights Road San Diego, CA 92130	San Dieguito Union High School District John Addleman, Executive Director, Planning, 760.753.6491 710 Encinitas Blvd., Encinitas, CA 92024	June - 2016	December - 2016	\$5,981,645	\$5,334,642	Unused Contingencies Returned to District	Tenant improvements of the existing Media Center encompassing new electrical genius bar stations, terrazzo stairs, offices, conference rooms, as well as over 500,000 SF of redesigned landscaping featuring new front entry hardscape.
Lease-Leaseback	Carlsbad High School Science Building Modernization 3557 Monroe Street Carlsbad, CA 92008	Carlsbad Unified School District Chris Wright, Assistant Superintendent Business, 760.331.5036 6225 El Camino Real, Carlsbad, CA 92009	June - 2020	June - 2021	\$ 7,169,046	\$6,469,046	Unused Contingencies Returned to District	Reconfiguration and modernization of 22,000 SF of existing classrooms at Carlsbad High School Science Building. Site work encompasses replacing all finishes including HVAC, plumbing, fire sprinklers, electrical, casework and roofing.
Lease-Leaseback	Val Verde District Office 3480 Webster Avenue Perris, CA 92571	Val Verde Unified School District Stacy Strawderman, Dir. Facilities & Purchasing, 951.940.6136 975 W. Morgan St., Perris, CA 92571	May - 2019	October - 2020	\$15,353,747	\$18,153,904	Increase in price was District issuing EHCC Amendments to perform additional work and replenishing the Contingency.	Project consists of installation of 43 modular/relocatable buildings, 279 regular and 7 accessible parking spaces on a six acre lot.
Lease-Leaseback	Orange Vista High School Stadium & New Parking Lot 1400 E. Orange Avenue Perris, CA 92571	Val Verde Unified School District Stacy Strawderman, Dir. Facilities & Purchasing, 951.940.6136 975 W. Morgan St., Perris, CA 92571	October - 2017	August - 2018	\$13,201,918	\$12,960,332	Contingency returned to District.	Demolition and reconstruction of stadium with new synthetic field turf and track, bleachers, snack bar, restrooms, 2 ticket booths, parking lot, and various site/infrastructure improvements.
Lease-Leaseback	Orange Vista High School Building 700 1400 E. Orange Avenue Perris, CA 92571	Val Verde Unified School District Stacy Strawderman, Dir. Facilities & Purchasing, 951.940.6136 975 W. Morgan St., Perris, CA 92571	October - 2017	August - 2018	\$12,983,858	\$12,583,556	Unused Contingencies Returned to District	Construction of a new 2-story, 50,000 SF building housing a media arts center, classrooms and various support rooms.



**GROSSMONT HIGH SCHOOL EVENT CENTER
CONSTRUCTION MANAGEMENT COST BREAKDOWN**

CONSTRUCTION MANAGEMENT CONTRACT VALUE - \$1,354,759

▪ Technical Analysis	4.61%
▪ Design & Implementation	4.36%
▪ Project Management	64.61%
▪ Monitoring	14.02%
▪ Training	5.54%
▪ Educational Programs	See Above
▪ Maintenance	1.62%
▪ Budgeting (3 Budgets: DD, 25%CD, 90% CD)	5.25%

ATTACHMENT F

NEWPORT MESA UNIFIED SCHOOL DISTRICT

**REQUEST FOR PROPOSALS AND STATEMENT OF QUALIFICATIONS FOR
CONSTRUCTION MANAGEMENT SERVICES**

STATEMENT OF NON-CONFLICT OF INTEREST

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

Signature



Printed Name

David Erickson

Title

Chief Executive Officer, Erickson-Hall Construction Co.

Date

February 21, 2021

ATTACHMENT G

FIRM PROPOSAL / OFFER FORM

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

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

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

Name of Person Duly Authorized to Execute this Proposal/Offer: David Erickson

Duly Authorized Signature: 

Title: Chief Executive Officer

Date of this Proposal/Offer: February 21, 2021

Offeror Name: Erickson-Hall Construction Co.

Offeror Address: 500 Corporate Drive, Escondido, CA 92029

Offeror Telephone: 760.796.7700

Offeror Email: plawlor@ericksonhall.com

ATTACHMENT H

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

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

**NONCOLLUSION
DECLARATION
Public Contract Code § 7106**

TO BE EXECUTED BY SUBMITTER AND SUBMITTED WITH RFQ

The undersigned declares:

I am the Chief Executive Officer [PRINT YOUR TITLE]

of Erickson-Hall Construction Co. [PRINT FIRM NAME],

The party making the foregoing Contract.

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

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

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

Date: February 21, 2021

Proper Name of Submitter: Erickson-Hall Construction Co.

City, State: Escondido, CA

Signature: 

Print Name: David Erickson

Title: Chief Executive Officer
