



QUALIFICATIONS FOR:

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

PREPARED FOR:  
Mr. Jonathan Geiszler  
Director of Purchasing & Warehouse  
Newport Mesa Unified School District  
2985 Bear Street  
Building A  
Costa Mesa, CA 92626

SUBMITTED ON:  
February 22, 2021



# LETTER OF INTEREST

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February 22, 2021

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

Re: Newport-Mesa Unified School District Construction Management Services (RFQ#119-21)

Dear Mr. Geiszler:

It is our pleasure to present our goal to be one of Newport-Mesa Unified School District's most trusted business partners. 19-15-13 and counting. These numbers represent how our Teams have been providing professional services to the San Mateo Community College District, the Chabot-Las Positas Community College District, and the San Francisco Unified School District.

The longevity of our client relationships represents our passion to represent our clients, to help our clients be successful. Whether it is the renovation of a restroom, installing new portable classrooms, closing a legacy DSA project, managing the construction of Safe Routes to School, or a new theater – all projects are important to the parents, children and the District.

Enclosed you will find our Qualifications for Construction Management Services to **Newport-Mesa Unified School District (NMUSD or District)**. Swinerton Management & Consulting is part of the Swinerton Family of Companies, established in 1888 and consists of several construction and professional-related service companies.

Swinerton Management & Consulting is the professional services division within the Swinerton family of companies. Our services range from full program and construction management services, consulting and strategic planning, to staff augmentation. More importantly, as part of the Swinerton family, NMUSD will have full access to the services and capabilities of a national construction services organization that includes legal, insurance, cost estimating, scheduling, safety and more.

Our Team, led by Craig Scaringi, Project Executive, with support from Bonnie Martin, have a deep understanding of the District. Together, they have managed construction on almost every school site in the District. Joe Commodore is a local resident and drives by Newport Harbor High school on a regular basis and has family in the District.

Our local office is located in Santa Ana, about 15 minutes away from the District office, and many of our staff live in or around the areas served by the Newport Mesa Unified School District. As a local member of the community, we recognize that our role is to not only deliver successful construction projects, it is also to build trust and confidence between the District with the community. A lot can be said when talking to neighbors and friends and saying, "I did that!" with immense pride. In addition to the Team in our proposal is a local workforce of over 500 construction professionals in the area, and a staff of over 1,200 in Southern California.

Swinerton has established its identity and reputation for providing high quality construction and professional services, integrity, customer satisfaction, financial stability and project team excellence. The family spirit and values of the Swinerton Companies has been the keystone of our successful 133-year history. These values are still apparent, having provided a consistent theme to successive generations of management and are deeply embedded in the culture and values of our Company today.

We are excited about this opportunity and look forward to presenting our Team to you virtually. If you have any questions, please feel free to contact me at [jgee@swinerton.com](mailto:jgee@swinerton.com), or at 650-483-7412, or Bonnie Martin at [bmartin@swinerton.com](mailto:bmartin@swinerton.com), or at 949-300-4066.

Very truly yours,

**Swinerton Management & Consulting**



Jeffrey S. Gee, AIA  
Vice President/General Manager

**Swinerton Management & Consulting**



Bonnie Martin  
Director of Education

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Section **1**

# Business Profile



# 1 BUSINESS PROFILE

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## 1.1 LEGAL FORM OF FIRM

Swinerton performs all construction management (not-at-risk) services under the name of Swinerton Management & Consulting (Formal Legal Name: Swinerton Builders DBA Swinerton Management & Consulting). Swinerton Builders is a wholly-owned subsidiary of Swinerton Incorporated. Swinerton Incorporated is a 100% employee-owned California Corporation. Swinerton was originally founded in 1888 and incorporated in California in 1908.

Swinerton's Orange County office, located at 200 North Main Street in Santa Ana, CA, will be the managing office for any construction management projects for Newport-Mesa Unified School District.

# 1 BUSINESS PROFILE

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## 1.2 ONE-PAGE HISTORY

The Swinerton Family of Companies, is a corporation established in 1888, was incorporated in the State of California in 1908 and is 100% employee-owned. Throughout the years, the Company has established its identity and reputation for high quality construction services, integrity, customer satisfaction, financial stability and project team excellence. The family spirit and values of the Swinerton Companies has been the keystone of our successful 133-year history. These values are still apparent, having provided a consistent theme to successive generations of management and are deeply embedded in the culture and core values of our Company today:

- Integrity
- Leadership
- Passion
- Excellence

As construction projects became increasingly more complex and expensive, clients found it imperative to ensure their projects were better planned, designed and executed. Swinerton responded to these needs in 1994 by consolidating all Program, Project and Construction Management and Consulting services into one Division. This division has evolved into Swinerton Management & Consulting (SMC). We are a full-service, consulting practice that provides a comprehensive range of services. As former capital improvement project managers for public agencies, our Team understands the needs, complexities, challenges and opportunities of managing projects in the public sector.

### Depth of Organization

Swinerton currently employs over 4,500 employees, with offices in 18 major cities nation-wide. As owners of the company, Swinerton's employees have a vested interest in outstanding performance. Their personal sense of ownership generates extra effort, dedication, and a collaborative team attitude that delivers significant value to clients — going well beyond just dollars and cents. All resources of the Swinerton Group are available to support our Program Team in any and all disciplines.

### Corporate/Social Responsibility

Swinerton has long been dedicated to positively impacting our industry, our communities, and our employees. We believe in building responsibly, as we do so through our commitment to economic and workforce development, philanthropy, safety, health and wellness, innovation, collaboration, and ensuring we are environmentally conscious in all of our operations. Corporate Social Responsibility (CSR) is not merely a department; it is the very DNA of our organization. All of us working together with a common CSR vision can ensure that Swinerton remains a sustainable company that builds better communities, better lives, better leaders and a better tomorrow.

### Commitment to Education

Swinerton has a dedicated Education Group whose sole focus is to provide services to K-12 and Community College clients. Swinerton has chosen our team for NMUSD from our Education Group and this specialization allows Swinerton to provide "Education-Focused" staff who understand the critical nature and nuanced approach to working on DSA projects and communicating with various District and community stakeholders, working collaboratively with DSA, DTSC, OPSC, SAB and the various regulatory agencies, and staying abreast of the latest legislative, legal, and project labor changes on both a local and state-wide level. This allows Swinerton's staff to become construction authorities in the Education market and build upon lessons learned and best practices to create the highest value for NMUSD.



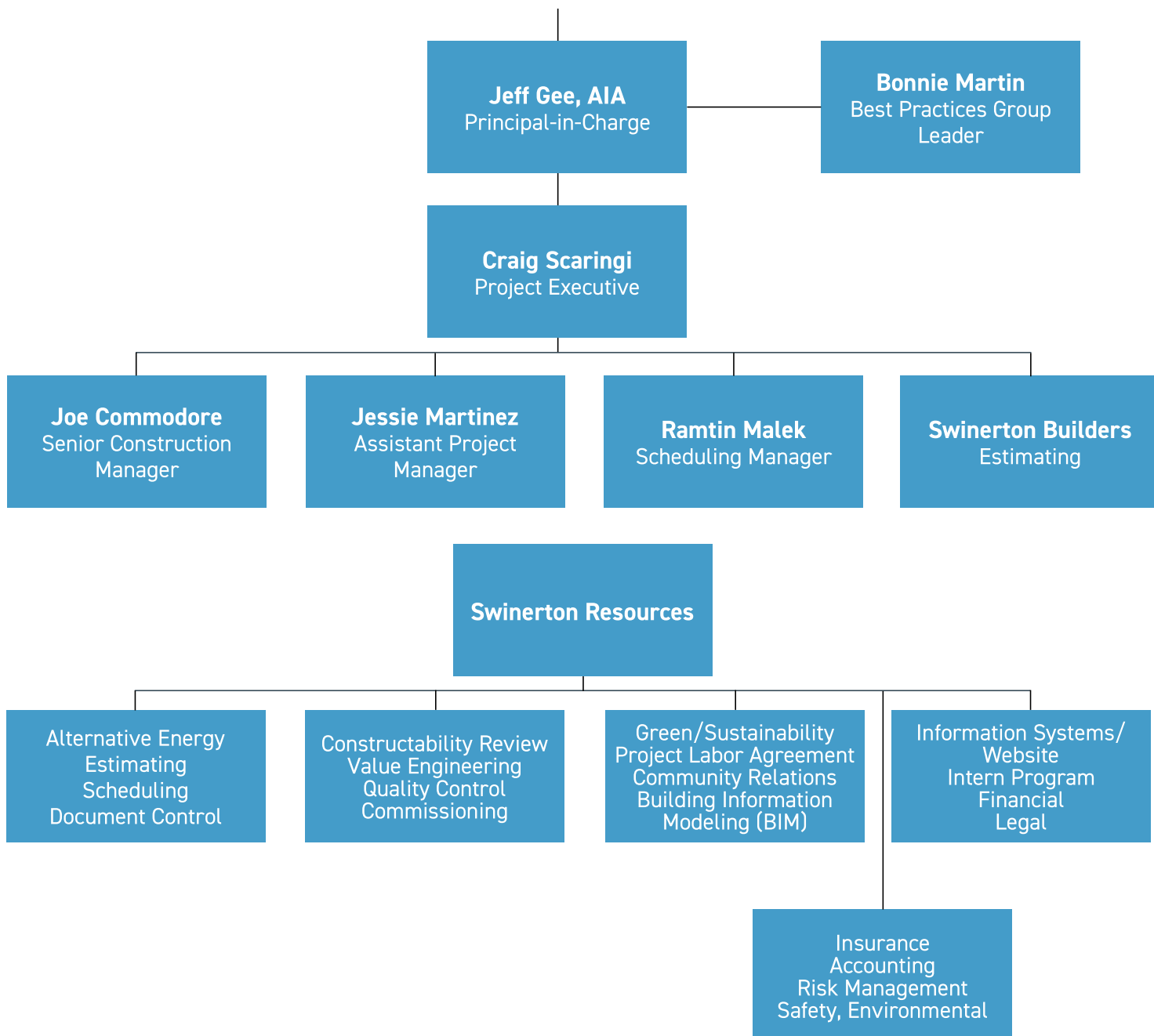
# 1 BUSINESS PROFILE

## 1.3 TEAM MEMBER RESUMES

The resumes that follow provide the qualifications and relevant experience (within the last 10 years) of our staff assigned to this contract.



**Newport-Mesa**  
Unified School District



Mr. Gee has over 35 years of experience leading and directing design, construction and development projects in the public sector and is a licensed Architect. He completed a 13-year tenure with the University of California, Berkeley, where he oversaw the management and implementation of over \$1.5 billion of capital projects, including seismic retrofit of existing buildings, renovations and renewal projects, and construction of new facilities. As the Vice President & General Manager with Swinerton, Mr. Gee's experience expanded to community colleges and K-12 where we've completed over 100 projects in excess of \$2 Billion. He has specific experience with design/build, as he was the principal author on the development of the Design-Build Guidelines for California Community Colleges, approved by the Board of Governors in May 2003. Mr. Gee was also a member of the State Chancellor's Office Task Force regarding AB3010 to work towards improving the partnership between community colleges and DSA.

While with the University of California Berkeley, One of Mr. Gee's major strategic accomplishments was to broaden the University's ability to procure and deliver projects using a variety of project delivery methods. Historically public-bid, low-bid, lump sum institution newer projects were designed and instituted using design-build, modified design-build (bridging), design assist, and other techniques. Through his efforts, Mr. Gee led the University's efforts to develop Construction Management/General Contractor (CMGC) project delivery with the goal of bringing the expertise of the builder to the design process and still comply with the Public Contract Code and requirements of the Legislative Analyst Office and the Department of Finance.

Another strategic accomplishment included the development of a new initiative to review the seismic condition of every building on the UC Berkeley campus. This effort led to the campus' development of its SAFER (Strategic Action plan for Facility Enhancement and Renewal), a 20-year, \$1 billion program to seismically retrofit buildings to achieve life safety. This process has developed and spread to other campuses in the University of California system.

Mr. Gee has served on numerous UC Berkeley campus and University of California committees. He has spoken and presented papers and seminars on various topics including design/build, campus planning, code and regulatory compliance, partnering, alternative project delivery, and project management.

As Program/Project Executive, Mr. Gee provides operational and senior management support to ensure the success of our Programs and Projects. He is responsible for providing any additional resources and technical expertise required. He attends key meetings, participates in any partnering sessions and ensures that we commit the full attention of Swinerton's senior management to guarantee the success of our services.

## PROJECT EXPERIENCE

### **Ascend at Lagoon Valley, Vacaville, CA**

A master planned community of commercial, residential communities, and protected open space between San Francisco and Sacramento. Over 800,000 square-feet of commercial office, including a parking structure and a fitness center, with an adjacent residential community of over 1,200 homes, surrounded by an additional 1,200 acres of protected opens space, including the 470-acre Lagoon Valley Park.

### **City of South San Francisco, Capital Improvement Program Management Services, South San Francisco, CA**

Program Management and construction management services on over 20 projects including park improvements, utility undergrounding, sewer and stormwater utilities, traffic system improvements, bike lanes, roadway and sidewalks, public facilities including: Citywide ADA improvements, restroom renovations, library entrance and corporation yard stockpile shelter. \$12 Million

## EDUCATION

B.A. Architecture,  
California Polytechnic State University,  
San Luis Obispo

Candidate, Executive M.S., California  
Polytechnic State University, San Luis Obispo

## REGISTRATION

California Registered Architect, 1985 -  
License No. C17086

## PROFESSIONAL MEMBERSHIPS

- American Institute of Architects
- Urban Land Institute
- APPA - Leadership in Educational Facilities
- Society of College and University Planners (SCUP)

## PROJECT EXPERIENCE (CONTINUED)

### Judicial Council of California, Administrative Office of the Courts, Superior Court of California, Santa Clara Family Justice Center, Santa Clara, CA

Owner Representative for the State of California, Administrative Office of the Courts, managing the design and construction of a The Santa Clara Family Justice Center that will consolidate family law functions from 6 current facilities into a new courthouse building in San Jose, CA that will improve operations and services for the residents of Santa Clara County. \$179 Million.

### South San Francisco Unified School District, South San Francisco, CA

Program management services for the District's Measure J Bond Program for improvements to the District's 15 schools that services 9600 students. \$162 Million.

### San Mateo County Community College District, San Mateo, CA

Program Management and Construction Management for Capital Improvements for three bond programs for the San Mateo County Community College District. The Program includes new construction, renovation, modernization, seismic and fire and life safety improvements at the District's three campuses: Cañada College (Redwood City), College of San Mateo, and Skyline College (San Bruno), with nearly 200 different projects over a 20-year program, including over \$600 Million design-build projects. \$1.3 Billion.

### City of El Cerrito Environmental Services Division and Recycling Center, El Cerrito, CA

LEED features/Design-Build. Project & Construction Management services for the City of El Cerrito Environmental Services Department Central Office and new Recycling Center facility that offers improved collection and processing areas. \$3 Million.

### City College of San Francisco, San Francisco, CA

Project and Construction Management Services that include ADA upgrades, barrier removal, modernization of the Chinatown/North Beach Campus, the Joint-Use Facility (JUF) and the Physical Education Field. \$222 Million.

### East County Hall of Justice, County of Alameda, Dublin, CA

A new Design/Build five-story Courthouse and separate two-story County Agency Office building for the District Attorney, Public Defender and Probation Center; joined by a connecting central lobby/security screening entrance area and elevator Atrium. The 13 courtroom facility will include the Court Clerk, Administration, Jury Services, Information Technology, and In-Custody Holding. The buildings are designed to accommodate approximately 380 employees and achieve a minimum USGBC LEED Silver Certification. Major building materials in the conceptual design include glazed curtain walls with metal sun shades, store front glazing and metal insulated wall panels. \$140 Million.

### City & County of San Francisco, Recreation and Parks, San Francisco, CA

Construction management support services on several park facilities for two bond measures; the 2008 \$152 Million Bond Measure and the \$160 Million 2012 Bond Measure.

## CIVIC ENGAGEMENT

- Vice Chair, Transbay Joint Powers Authority
- Ex-officio, San Mateo County Transportation Authority (SamTrans)
- Trustee, Palo Alto University
- Treasurer, San Mateo County API Caucus
- Former Mayor, Vice Mayor and Councilmember, City of Redwood City
- Former Chair and Director, San Mateo County Transit District (SamTrans)
- Former Chair and Director, Joint Powers Authority (Caltrain)
- Former Chair and Director, Commute.org
- Former President and Director, League of California Cities, API Caucus
- Past Chairman, Redwood City-San Mateo County Chamber of Commerce

## AFFILIATIONS | CERTIFICATIONS

- American Institute of Architects
- Former Planning Commissioner, City of Redwood City
- Architectural Review Committee, City of Redwood City
- Vice President, Collaborative Process Institute
- **FACULTY**  
Association of Higher Education Faculty
- Administrators, Special Program on Facility Design and Management, University of California Extension

## REFERENCES

Ron Galatolo  
Chancellor, San Mateo Community College District  
650.574.6512  
galatolor@smccd.edu

Sylvia Kwan, FAIA  
Principal, Kwan Henmi Architecture  
415.269.9770  
Sylvia.kwan@kwhenmi.com

## PROJECT EXPERIENCE (CONTINUED)

**Solano Community College District, Vacaville, Vallejo and Fairfield, CA** Comprehensive Project and Construction Management services for three design-build projects on three college campus sites including: the Biotechnology and Science Building at the Vacaville Campus, the Autotech Project at the Vallejo Campus, a new Science Building and a design-bid-build New Learning Resource Center/Library at the Fairfield Campus. \$150 Million.

### **San Carlos School District, South San Carlos, CA**

Pre-Bond management support and program management services for the District's Measure H Bond Program for the District's nine schools that services over 3300 students. Scope of services included conceptual master planning that included the development of a project prioritization criteria, review and development of project specific phasing strategies, budgets, contingencies, non-construction costs and alignment of project priority list with appropriate funding. Scope of services also included management of CEQA and planning consultants, strategy and facilitation in the management of DSA relationships, grant and funding research and community relations. \$72 Million.

### **East Side Union High School District, Districtwide Projects, San Jose, CA**

Comprehensive project/construction management services for districtwide projects that affect all 23 school sites, including: swimming pool reconstruction, energy services contracts (ESCO), security camera systems, fire alarm systems replacement, mechanical (HVAC, Electrical (Switchgear and Electrical Panels) wireless network upgrades and roof replacements, utilizing the design/build delivery method. Scope of services also includes project coordination with stakeholders, school administrators, Division of the State Architect, Board of Trustees, replacement of portable classrooms, building interior renovations, replacements and upgrades of domestic waterlines, exterior painting, site lighting, ADA compliance upgrades to restrooms and interim housing. \$75 Million. Key projects include:

- Fire Alarm Upgrades, \$19 Million
- Security Cameras, \$9 Million
- Swimming Pools, \$22 Million
- HVAC Improvements \$11 Million
- Photovoltaics and Energy Management Systems, \$6 Million
- Roof Replacements, \$8.2 Million

### **Judicial Council of California, Administrative Office of the Courts, Superior Court of California, San Benito County Hollister Courthouse, Hollister CA**

Owner Representative for the State of California, Administrative Office of the Courts, managing the design and construction of a new 41,500 square-foot courthouse in the City of Hollister. The new courthouse will replace the physically and functionally deficient facility that the Superior Court of San Benito County (Court) now shares with the County in downtown Hollister. Scope of project includes three courtrooms, court support function, jury assembly space and in-custody holding. Onsite, there are 92 parking spaces, 12 of which are enclosed secured parking spaces. The new courthouse will be fully secure and jury-capable. It will support all case types county-wide, although juvenile delinquency matters will continue to be held one morning per week at the juvenile detention center adjacent to the County of San Benito jail. \$32 Million.

### **City of Richmond's Via Verdi Repair and San Pablo Creek Restoration, Richmond, CA**

Repair of the sinkhole and restoration of the creek culvert. A culverted section of San Pablo Creek, underneath Via Verdi (Street) collapsed without warning in Spring of 2010. The resulting sinkhole was estimated to be about 120 feet long, 40 feet wide, and 30 feet deep. The repair work included removing the temporary channel; constructing a new permanent headwall; constructing a permanent culvert; tying the headwall to the permanent culvert and the permanent culvert to the transition headwall; installing Engineered Fill; constructing Via Verdi and restoring the private parcel to its original condition. Additionally the water from San Pablo Creek was diverted through a temporary pumping station and overland temporary piping for the duration of the work in the creek area. The construction project necessitated additional coordination with, and cooperation from numerous outside entities, including; utility companies, Caltrans, AC Transit, Corps of Engineers, RWQCB, California Department of Fish and Game, and Contra Costa County Flood Control District. The project also required construction of numerous temporary retaining structures to facilitate the construction of the permanent channel structure. \$6.5 Million.



## PROJECT EXPERIENCE (CONTINUED)

### City College of San Francisco, San Francisco, CA

Project and Construction Management Services that include ADA upgrades, barrier removal, modernization of the Chinatown/Northbeach Campus, the Joint-Use Facility (JUF) and the Physical Education Field. \$222 Million.

### The Presidio Trust, San Francisco, CA

Development of The Presidio Trust Construction Plan and Infrastructure Plan for upcoming major projects in and immediately adjacent to the Main Post area. In the next fiscal year, a dozen projects are anticipated to begin (up to \$500 Million over four years) in the Main Post area. Projects include:

- Metropolitan Transportation Agency's Doyle Drive Reconstruction Project
- Boeddeker Park and Clubhouse Renovation
- Hayes Valley Playground and Clubhouse Renovation
- Balboa Park Site Improvements

### Cupertino Union School District, Cupertino, CA

Project and Construction Management Services for the District's Measure H Program for improvements and modernizations to 20 schools requiring comprehensive project and construction management services including: planning, bid management, construction oversight and management, coordination, administration, scheduling, consulting and advice and related services. The scope of work includes seismic upgrades, roof replacements, replacement of portable classrooms, building interior renovations, data infrastructure upgrades, upgrades and replacements of domestic waterlines, exterior painting, sight lighting and ADA compliance upgrades to restrooms. \$220 Million.

### Solano County Twin Campus Program, Vallejo and Fairfield, CA

A five building program that included a new LEED Registered, three-story, 57,800-square-foot Health and Social Services office building that was delivered Design/Build; the first phase of a new, two-story, 30,900-square-foot Clinic/Lab Facility; and 87,000-square-foot of renovations to three existing buildings. \$59 Million.

### Barstow Community College District, Performing Arts Center, Barstow, CA

Project and construction management services on several projects including the Performing Arts Center, two-story new performing arts center with seating for 755 and a black box theater seating for 153; the building was constructed using many products have a LEED certification and part of Southern California Edison's Saving by Design Program, the Wellness Center, a 20,000 square-foot two-story building that a fitness equipment room, classrooms and indoor track on the second floor and campus-wide electrical upgrades that included replacement of the existing electrical switchgear 5KVS system, associated transformers, wires and pull boxes. \$35.8 Million.

### The Presidio Trust - Doyle Drive Reconstruction, San Francisco, CA

The Doyle Drive Replacement Project comprised of the demolition of the existing southern access to the Golden Gate Bridge and re-envisioned a new roadway tucked into the natural contours of the Presidio of San Francisco and the Golden Gate National Recreation Area, one of the nation's largest urban parks. It created a spectacular regional gateway between the iconic Golden Gate Bridge and the City of San Francisco. The new parkway was carefully designed to be context sensitive, improve access to the Presidio, and include the unique features of a parkway, rather than a freeway. \$750 Million.

### San Francisco Unified School District 2008 Bond Measure, San Francisco, CA

Swinerton Management & Consulting was one of firms selected by the San Francisco Unified School District to provide construction management services on two separate bond Programs. District's 2006 Bond Program scope of work included more than 90 new construction, modernization and renovation projects. \$450 Million.

### San Francisco Unified School District 2011 Bond Measure, San Francisco, CA

The District's second 2011 Bond Program includes more than 60 new construction, modernization and renovation projects. \$561 Million.

## PROJECT EXPERIENCE (CONTINUED)

### Castro Valley Library, Castro Valley, CA

A new single-story, 34,500-square-foot library. With state-of-the-art energy efficiency features, this project is targeted to receive LEED Silver certification. \$21 Million.

### CDCR - California Dept. of Corrections and Rehabilitation, (HCFIP), Folsom State Prison, Represa, CA

The scope of work includes renovation to existing buildings and new building construction. The Work is being built at the existing prison site within and around the fully functioning Men's Prison. The purpose of the HCFIP at FSP is to remedy deficiencies in its existing Health Care components. \$31 Million. The HCFIP at FSP includes 8 Sub-Projects including:

- SP-1: New Minimum Support Facility Primary Care Clinic - 3,072 square-feet
- SP-2: New Primary Care Clinic - 3,268 square-feet
- SP-3A: New Main Yard Showers- 3,500 square-feet
- SP-3B: New Education Annex Building - 4,948 square-feet
- SP-3C: New Central Health Services Building - 17,978 square-feet
- SP-6A: New Fire Water Line Infrastructure - 6,970 LF
- SP-6B: New Emergency Generator Infrastructure
- SP-6C: Existing Rockwall Stabilization

### CDCR - California Dept. of Corrections and Rehabilitation, (HCFIP), MuleCreek State Prison, Ione, CA

Scope of work includes renovation to existing buildings and new building construction. The work is being performed at the existing prison site within and around the fully functioning Men's Level I, III and IV Prison. The purpose of the HCFIP at MCSP is to remedy deficiencies in its existing Health Care components. \$15.5 Million. The HCFIP at MCSP includes 6 Sub-Projects:

- SP-1: Central Health Services Renovation - 4,944 square-feet
- SP-2A: Primary Care Clinic Renovation (3) - 3,870 square-feet each
- SP-2B: New Clothing Exchange Buildings (3) - 1,200 square-feet each
- SP-3: New ASU Primary Care & ASU EOP Mental Health Clinic- 6,111 square-feet
- SP-4: New Pharmacy and Laboratory Building - 2,471 square-feet
- SP-5: Healthcare Administration Renovation - 8,098 square-feet

### CDCR - California Dept. of Corrections and Rehabilitation, (HCFIP), Sacramento State Prison, Ione, CA

The Sacramento Prison shares an 882 acre property with Folsom State Prison (FSP), Folsom Women's Facility, and California Prison Authority. The work at Sacramento consists of new building construction. The Work is being built at the existing prison site within and around the fully functioning Men's Level IV Prison. The purpose of the HCFIP at Sacramento is to remedy deficiencies in its existing Health Care components. \$24 Million. The HCFIP Sacramento Project includes two Sub-Projects:

- SP-1: New Facility APSU-ASU Primary Care Clinic - 6,578 square-feet
- SP-3: New Central Health Services Building - 28,089 square-feet

### Town of Los Gatos Library, Los Gatos, CA

The new library more than double the space currently available to include adequate room for the library collections. It features a technology lab, group study room, teen area, expanded children's and storytelling area, history room, periodical/reading room with a fireplace, and meeting room. Scope of work also included ground level parking lots, retaining walls, landscaping, and associated site and utility improvements. \$18.4 Million.

### Lake Solano Visitors Center, Winters, CA

A new 5,000-square-foot structural steel and structural glass building, to include a 2500-square-foot exhibit hall, two adjacent outdoor meeting plazas, a camp store, an information/reception area and administration offices for the Parks Department. Project also included an outdoor interpretive station with a lawn area for outdoor activities and a defined trail to Pleasant Creek. Site improvements included a bus turnaround area with drop-off, demonstration gardens and a new on-site waste disposal system. \$3 Million.

## PROJECT EXPERIENCE (CONTINUED)

### City of Fairfield, Community Sports Complex, Fairfield, CA

Design Management services for the development and construction of the 43-acre Fairfield Community Sports Complex as part of the planned redevelopment of the 46-acre Allan Witt Community Park.

### Sacramento City Unified School District CA

Selected by the District to assist staff with the development of findings in support of their decision to adopt a project stabilization agreement (PSA) for their public works construction program. The scope of work included interviews with interested parties, surveys and interviews with school and community college districts that were currently implementing their construction programs with some form of labor agreements and the negotiation of a PSA with the Sacramento-Sierra's Building and Trades Council.

### Chabot College, Chabot-Las Positas Community College District, CA

Project and construction Management services for their Capital Improvement Program for their Measure B Bond projects at Chabot College. The scope of work encompasses over 53 projects over a 8-year program with an aggressive schedule. \$253 Million.

### Chabot-Las Positas Community College District PLA, CA

SMC provided strategic consulting services to the District on the matter of a project labor agreement (PLA). Services included research, surveys, and interviews with a wide-variety of interested parties, stakeholders and school and community college districts that are currently utilizing a PLA for their public works construction program. Voters in the District passed a \$500 million bond measure in 2004 for capital improvements at their two colleges: Chabot College in Hayward and the Las Positas College in Livermore.

### College of Marin, Marin Community College District, CA

Program Management and Construction Management for Capital Improvements Program that included new construction, renovation, modernization, seismic and fire and life safety improvements at the District's two campuses: College of Marin (Kentfield), and Indian Valley Campus (Novato), with nearly 35 different projects over a seven year program. \$264.5 Million.

### Merced Community College District, CA

Comprehensive construction management services for the District's new Learning Resources and Library Center and sitework at Merced City College. \$17 Million.

### Peralta Community College District, Berkeley City College, Berkeley, CA

Project and Construction Management services for the new Berkeley City College for the Peralta Community College District. New College project will consist of a new 160,000-square-foot six-story building in downtown Berkeley. The contemporary College building project participated in the LEED & Green building programs as well as the Prop 47 Energy Grant programs offered by the State. Building included 35 classroom spaces, administrative spaces, and a 225-seat auditorium that will also be available to the public for community affair events. \$67 Million.

### West Valley Mission Community College District, CA

Construction Management for Capital Improvements Program that included new construction, renovation, modernization, seismic and fire and life safety improvements at the District's two campuses: West Valley College (Saratoga), and Mission College (Santa Clara). \$388 Million.

### Throckmorton Ridge Fire Station, Marin County, CA

Design Management of a new 5,352-square-foot fire station. Located on the Panoramic Highway, the station houses three engine bays and is LEED Silver certified.

### Jewish Community Center, San Francisco, CA

A 250,000-square-foot new construction community and cultural center including retail and restaurant lease space, office space, 450-seat theater with retractable seating, classrooms, and Club One Fitness Center. Project included demolition of several existing buildings, extensive shoring of adjacent buildings, and a 75' deep excavation for a 100,000 SF underground parking garage on a tight urban site at the junction of two busy Municipal Railway trolley bus lines. \$90 Million.

## PROJECT EXPERIENCE (CONTINUED)

### **Pacific Graduate School of Psychology, Palo Alto, CA**

Modest renovation of an existing research campus for the new home of the Pacific Graduate School of Psychology. The 1791 Arastradero Road site is an 8-acre site located in the Palo Alto foothills. The property contains three existing buildings, totaling approximately 24,700 GSF. The scope of work included limited new interior construction, repairs and maintenance to the campus, including a new fire pump, refreshing of interior finishes, and basic program needs. The total project budget for the project was \$1.7 million and was completed in July 2009.

### **South Lake Tahoe Police Station Addition, South Lake Tahoe, CA**

Scope of work included design and construction of a new addition to the existing police station. Project plans included the design of a new Emergency Operations Center (EOC).

### **City of Berkeley Jail Renovation and Expansion, Berkeley, CA**

The project scope included the renovation and expansion of the existing Berkeley jail located on the upper floors of the police station. This project faced extremely difficult challenges with the existing structure, while maintaining the operations of the police station during construction.

### **Lerdo Pre-Trail Jail Facility, Kern County, CA**

Scope of work included the addition of a new housing module to the existing county correctional facility.

### **Federal Detention Facility, Dublin, CA**

A new campus was designed and constructed adjacent to the existing Federal prison at Camp Roberts. This new facility was designed to detain individuals awaiting Federal trial.

### **California Correction Institution, Special Housing Unit (SHU), Frontera, CA**

This effort involved the development of a Project Planning Guide for the Department of Corrections to develop a Special Housing Unit at the women's correctional institution in Frontera.

### **University of California Berkeley, Hearst Field Annex, College of Environmental Design, Berkeley, CA**

Due to the campus' urgent need to seismically retrofit a number of its buildings, new space was needed to enable faculty, staff, and students to relocate out of construction areas. The campus approved this project in November 1998. The design-build team was selected in December and groundbreaking occurred in January 1999. The College of Environmental Design moved into this new 37,000 square foot facility in time for the August 1999 semester. \$5 Million.

**University of California Berkeley, Law School Addition & Renovation, Berkeley, CA** The Berkeley campus' first contemporary design-build project involved the design and construction of a new, four-story addition, the renovation of an existing student dormitory into faculty offices, and renovation of the existing library. This project focused on maximizing value and speed of delivery. The design-build team was selected in December 1995, and construction began on July 1, 1996. The renovation of the student dormitories was completed by March 1 of 1997, the new addition completed by July 1997, and the remainder of the project by October 1997. \$14 Million.

### **University of California Berkeley, Seismic Safety Corrections FEMA Program Phase 1, Berkeley, CA**

In 1997, the Berkeley campus prepared and submitted four Hazard Mitigation Grant Proposals to the Federal Emergency Management Agency (FEMA) for the seismic retrofit of buildings at the Berkeley campus. Mr. Gee led the team that prepared the grant submittals for: Barrows Hall, Hildebrand Hall, Latimer Hall, and Silver Space Sciences Laboratory. In October 1998, at a kickoff meeting of another FEMA initiative, the Disaster Resistant University, FEMA announced that the campus would receive approximately \$42 million to mitigate seismic hazards in these four buildings. The State provided approximately \$14 million in matching funds with the remaining \$33 million funded by the campus. Construction began on Silver Lab in Spring 2000, Barrows Hall in Summer 2000, Hildebrand and Latimer Halls began construction in the Fall of 2000.



## PROJECT EXPERIENCE (CONTINUED)

With over 550,000 GSF involved, the construction of seismic retrofits of several other campus buildings, and the lack of surge space opportunities, most of this construction is occurring with the buildings occupied. In the case of Hildebrand and Latimer Halls, two buildings occupied by the College of Chemistry, nearly \$14 million was spent on over 42 projects to prepare spaces for relocation of faculty offices, research laboratories and classrooms.

**Other Representative Projects Developed and Constructed during Mr. Gee's Tenure with the University of California Berkeley, Berkeley, CA, include:**

### SEISMIC RETROFIT

- University Hall Barrows Hall
- Hildebrand Hall
- Latimer Hall
- Silver Space Sciences Laboratory
- Residence Hall Units 1 and 2
- McCone Hall
- California Hall
- Warster Hall
- Berkeley Art Museum
- Barker Hall

### HISTORIC STRUCTURES, SEISMIC RETROFIT

- Doe Library University House
- Goldman School of Public Policy
- Dance Facility
- 2251 College (Archeology Facility)
- North Gate Hall

### STUDENT HOUSING

- Shattuck - Channing Student House Haste-Channing Student Housing
- University Terrace
- University Village, Albany, Step 1

### ACADEMIC FACILITIES

- School of Business Chemistry Unit 3 (Tan Hall)
- Silver Laboratory Addition
- Soda Hall (Computer Science)

### OTHER FACILITIES

- Haas Pavilion
- Rugby Field House
- Central Dining and Office Facility
- Seismic Replacement Building 1
- University Health Services
- Landscape Improvements
- Memorial Glade
- West Gate Improvements

### PROJECT LEADERSHIP

- University of California, Hastings School of Law

### DESIGN/BUILD

- Law School Addition and Renovations
- University Village Phase 1, Albany, CA
- Hearst Field Annex

## PROJECT EXPERIENCE (CONTINUED)

### MODIFIED DESIGN/BUILD

- Shattuck-Channing Student Housing

### DESIGN-ASSIST

- Haas Pavilion
- Office Facility
- Stanley Hall Replacement

### CONSTRUCTION MANAGER/GENERAL CONTRACTOR

- Hearst Memorial Mining Building, Seismic Retrofit and Renovation
- Barker Hall, Seismic Retrofit and Renovation
- Wurster Hall, Seismic Retrofit
- Barrows Hall, Seismic Retrofit
- Hildebrand Hall, Seismic Retrofit
- Latimer Hall, Seismic Retrofit
- Silver Space Sciences Laboratory, Seismic Retrofit
- Building No. 1, Seismic Replacement
- Central Dining and Office Facility
- Stanley Hall Replacement

As Director of Education, Bonnie brings over 32 years of construction industry and DSA experience to the project. Her background is well suited for the project, as she has been responsible for the oversight of the financial outcome and success of multiple projects and construction management programs. She is well versed in integrated project delivery methods, including Lease-Leaseback, Design-Bid-Build, Design-Build, and CM-at-Risk with Higher Education and Public Works clients. She supports the clients and project team in every aspect of pre-construction and construction, including: estimating, subcontract negotiation, reporting, scheduling, accounting, quality, safety, claims management, and closeout. She encourages open communication directly with the District's team, and leads presentations for oversight committees and boards. Her experience on education projects/programs will greatly benefit this project; they range in size from \$3 million to \$280 million, with an average oversight of \$150 to \$200 million at one time.

**2013**  
STARTED AT SWINERTON

**1987**  
STARTED IN INDUSTRY

## PROJECT EXPERIENCE

### **San Diego USD Lindbergh Elementary School, San Diego, CA**

Work included a new, 37,500-square-foot two-story classroom and administration building; reconfiguration of an existing building; full interior demo and modernization of all existing classrooms and restrooms; new roofs, windows, and exterior paint in all buildings; removal of all portable structures; demolition and replacement of a parking lot; new athletic turf field with a new irrigation system; and sitewide paving and landscaping.

### **Wegeforth Elementary School Whole Site Modernization Project, San Diego, CA**

A site-wide modernization program is being performed to all six buildings at an existing elementary school. All doors, windows, and finishes will be replaced, including flooring, casework, tile, and ceilings; and MEP systems will be upgraded. Existing spaces will be renovated to create a new teacher's lounge, an educational space, and an upgraded food service facility. Site-wide improvements include upgrades to fire alarm, security, data, and communication systems; ADA access; and exterior lighting.

### **MiraCosta College Oceanside Campus Student Services and Veterans Center, Mira Costa, CA**

The new two-story Student Services and Veterans Center building will consolidate all student service functions into a "one-stop shop." In addition, it will provide improved services for student Veterans with a comprehensive Veterans' Support Center. The building will provide a much needed "campus gateway" and will include a new campus promenade. A new transit center will also be built, which will connect to the existing pedestrian bridge and allow students to access the central hub of the campus.

### **LBUSD Millikan High School, Long Beach, CA**

The new three-story, 56,000-square-foot, 20-classroom building is a cast-in-place concrete structure with structural steel framing and steel decking. Work also includes a new artificial turf soccer/softball field, along with the demolition of the existing soccer/softball field, physical education blacktop area, and maintenance yard.

## EDUCATION

BS in Civil Engineering  
San Jose State University

## AFFILIATIONS / CERTIFICATIONS

First Aid Certified

OSHA 10-Hour

EIT

AGC

CMAA

WIC

DBIA

## REFERENCES

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## PROJECT EXPERIENCE (CONTINUED)

### **LBUSD Jordan High School - Phase 2, Long Beach, CA**

Major renovations on both the school's existing 15,000-square-foot Library Building and the 6,400-square-foot Administration Building included: non-bearing interior wall demolition and new construction; removal and replacement of glulam beams; new roofs; new ceilings; new mechanical, fire alarm, power, data, and low-voltage systems; new casework; new doors, frames, and hardware; new lighting; new exterior and interior paint; new signage; and ADA upgrades of restrooms.

### **LAUSD Roosevelt High School, Los Angeles, CA**

A design-build project on a fully occupied campus, 226,773 square feet of new buildings are being built: a 3-story, 78-classroom building; 2-story administration building; and 1-level performing arts center. Work includes demolition of 262,103 square feet with 111 classrooms. New sanitary sewer, storm water, potable water, gas, and electrical systems are also being installed.

### **Downey USD, Sussman Middle School, Downey, CA**

This 107,000-square-foot project includes a new two-story classroom, a new science building, and a new 14,000-square-foot gymnasium building. Additionally, this project includes a 4,000-square-foot addition to the existing administration building, along with 64,000-square feet of modernization and reconfiguration of all existing classroom buildings and 14 restrooms.

### **Golden West College Criminal Justice Training Center, CCCD, Huntington Beach, CA**

A design-build project, the new Criminal Justice Training Center is replacing the existing outdated facility. It brings a state-of-the-art training complex to the college, providing a high-tech campus to train peace officers and support personnel. The new two-story building includes 38,932 gross square feet of academy classrooms, a self-defense mat room, force simulation training room, fitness lab, locker rooms, secure armory, administration space, and a multi-purpose facility. Outdoor areas feature a "grinder" drill area, "Biddle" obstacle course, traffic-stop scenario training street, park scenario training area, infrastructure for the scenario village training area, and a fallen officer memorial. They also demolished the existing 5,205-square-foot Community Center before construction began.

### **Irvine Valley College A400 Building, SOCCCD, Irvine, CA**

A design-build project, it brings a new two-story classroom building to the ever-growing Irvine Valley College campus. The building features 27,000 square feet of classroom, laboratory, and office space. It includes seven 30-seat classrooms, three 40-seat classrooms, two 45-seat classrooms, a writing center, an anthropology/geography lab, an honors program area, and offices. The design was created to the LEED Gold standard using daylight harvesting, improved lighting, recycled materials, native plants, and many other assorted green building practices. Swinerton's Orange County-based Concrete Services group self-performed a large amount of work on the project.

### **San Bernardino Valley College Gymnasium, SBCCD, San Bernardino, CA**

This project consisted of a new three-story gym for San Bernardino Valley College's athletics programs to replace the outdated gym built in 1975. The new 146,000-square-foot gym features hardwood basketball courts that can be used for many multi-purpose uses. The gym also features fitness rooms, locker rooms, lecture rooms, as well as classrooms and offices for sports teams' coaches and staff. Site utility work and landscaping is done to the surrounding area in support of the new building. The project is under DSA approval, and includes many sustainable features to achieve LEED Silver certification.

### **Lemonwood K-8 School, OUSD, Oxnard, CA**

The Lease-leaseback services included preconstruction services and construction to convert the existing occupied campus from K-6 to K-8 with additional programs. All buildings were demolished and replaced in complex phases along with utility services to allow campus to remain operational. The new buildings included 34 classrooms, 3 science/flex labs, media center, a MPR/PE room, admin areas, food services, and support facilities. Site work included new play fields and parking areas.

## PROJECT EXPERIENCE (CONTINUED)

### **Phase 2 of the Multi-Site Project: Hoover High School, Glendale High School, and Muir Elementary School, GUSD, Glendale, CA**

Work is taking place simultaneously at Glendale and Hoover High Schools. At Glendale High School, the project team is adding two new buildings with restrooms: a two-story, 17,000-square-foot building with seven tech labs and a dedicated elevator; and a one-story, 5,000-square-foot building with three classrooms. Using Type IIB construction, the foundations use grade beams that sit upon large shear-key containing base plates. There are several slabs-on-grade, one concrete infilled metal deck, two cast-on-metal-deck concrete stairs, curbs, and utility pads on metal deck. At Hoover High School, the project team is adding a new two-story building with an elevator and restrooms. Totalling roughly 11,000 square feet, it has seven standard classrooms and a photo lab. The building rests mostly on large mat-type foundations, with some smaller column pads along the periphery. Using slab-on-grade construction, they are also utilizing two slab-on-metal-decks with lightweight concrete. About 50 linear feet of 21" tall planter wall run along F line, along with roughly 700 linear feet of other miscellaneous curbs at slab-on-deck and slab-on-metal-deck.

### **Fremont High School, LAUSD, Los Angeles, CA**

Design-build, 190,000 square foot project with the combination of Modernization and New Construction. Bonnie led the project team through the design and scope development process, partnering with the clients internal departments to meet the standards and expectations of LAUSD and the new Small Learning Communities (SLC's). Overseeing the estimates and managing cost, constructability and preparation of front end/bid documents while concurrently working with the school on phasing, safety, site logistics and relocation of staff and students.

### **El Dorado High School Performing Arts Center, PYLUSD, Placentia, CA**

Construction of a new 600-seat, 18,000-square-foot performing arts center at El Dorado High School. The new center will feature a CMU building with shadow block, steel canopies, metal panels, and an eye-catching curtain wall entry. Scope also includes the renovation of the existing staff and student parking lot consisting of 300 parking stalls. The interior design will include a glass lobby, a stage with a fly loft, audio/visual equipment, practice rooms for staff, and storage areas.

### **Lawndale High School Student Services Building, CVUHSD, Lawndale, CA**

This DSA project consists of a single three-story 115,000- square-foot Type IIA building. The building will contain space for administration, media center, campus security and forty-two teaching stations. The teaching stations are comprised of 15 standard classrooms, eight SDC classrooms, 12 science labs, two art labs, two computer application labs, one yearbook journalism class, one open computer lab, and one AVID class.

### **Costa Mesa Middle School Enclave, NMUSD, Costa Mesa, CA**

The new 31,000-square-foot, two-story, Type-2 building includes 15 classrooms and 4 science labs, along with administration space and bathroom facilities. The structure is concrete grade beams with structural steel frame and concrete on metal deck, while the exterior skin is brick, plaster, aluminum, and metal panels.

### **Rancho Mirage High School, PSUSD, Rancho Mirage, CA**

Lease-Leaseback, \$100 million, 260,000 square foot campus comprised of nine buildings including a 500-seat performing arts center, two gymnasiums, library, state-of-the-art sciences buildings as well as a full kitchen and classrooms.

### **Painted Hills Middle School, PSUSD, Palm Springs, CA**

\$39.5 million, 144,106 sf, 2-story middle school composed of classroom wings joined by the central administration and library/media center. The structures will be arranged around a central courtyard featuring an outdoor amphitheater and the covered lunch shelter. The classrooms and labs are organized into interdisciplinary grade-level learning groups. Each classroom area is adjoined by shared small group instruction spaces and prep rooms for collaborative teaching opportunities. The library/media center, a computer lab, and elective classrooms are centrally located near the main entry of the school for student and potential community use. Provided as a lease-leaseback project.



## PROJECT EXPERIENCE (CONTINUED)

### **New Middle School, LBUUSD, Signal Hill, CA**

\$38.6 million, 79,000 sf middle school, provided as a lease-leaseback project.

### **Paramount High School Library & Mini-Gym, PUSD, Paramount, CA**

\$9.9 million, new 8,000 sf library building and 9,000 sf Gymnasium built on an existing high school campus, provided as a lease-leaseback project.

### **Juan Rodriguez Cabrillo High School, LBUUSD, Long Beach, CA**

Construction Management services for a \$42 million (construction value), 240,000 sf high school phased rebuild including classroom facilities, science laboratories, a business and vocational building, kitchen/cafeteria, administrative and counseling areas, a gymnasium and a 19,000 sf performing arts center while the high school remained in full operation.

### **Lakewood High School, LBUUSD, Long Beach, CA**

Construction management services for \$75,000 (construction value) high school modernization.

### **Cesar Chavez Elementary School, LBUUSD, Long Beach, CA**

Construction Management services for \$15.5 million (construction value) K-5 elementary school.

### **Dooley's K-5 Elementary School, LBUUSD, Long Beach, CA**

Construction Management services for a \$32.3 million (construction value), 146,383 sf elementary school.

### **Will Rogers Middle School, LBUUSD, Long Beach, CA**

Construction Management services for a \$4.2 million (construction value), modernization of an existing middle school. Her firm was brought in to provide "distressed project" management mid-way into construction in order to assist in the project completion.

### **Miscellaneous Facilities Projects, LBUUSD, Long Beach, CA**

\$85,000 consulting contract for miscellaneous facilities projects.

### **School for Adults, LBUUSD, Long Beach, CA**

Construction management service for \$622,000 (construction value) demolition of existing and addition of new permanent portable classrooms within an existing campus.

### **Measure A CM Services Staff Augmentation, LBUUSD, Long Beach, CA**

\$125,000 management of small projects throughout the District.

### **Costa Mesa High School Aquatics Center, NMUSD, Costa Mesa, CA**

Construction management services for \$5.5 million (construction value) new 50 meter by 25 yard competition pool and new support structures, concessions, locker rooms and facility areas.

### **Facilities Improvement Program, NMUSD, Costa Mesa, CA**

\$110 million, Program and Construction Management Services for 22 elementary schools, 2 middle schools, and 4 high schools. New construction and modernization for each of the sites.

### **Measure F Program Phase 1, NMUSD, Costa Mesa, CA**

Construction Management services for \$52 million (construction value) Measure F Bond Program.

### **Measure F Phase 2, NMUSD, Costa Mesa, CA**

Construction management services for \$13,000,000 (Construction Value) Measure F projects, phase 2, including new Estancia High School stadium complete with pre-manufactured bleacher systems, scoreboard, artificial track and field, home and away locker rooms, team rooms and concession stand. Also included are elementary science classrooms on each of the 21 campuses. Some are new relocatables and some are modernizations of existing classrooms.

### **Outside Measure A Contract 1, NMUSD, Newport Beach, CA**

\$1.2 million miscellaneous project management services related to various projects and DSA close-out of open permits throughout the District.

## PROJECT EXPERIENCE (CONTINUED)

### **Outside Measure A Contract 2, NMUSD, Newport Beach, CA**

\$750,000 miscellaneous project management services related to various projects and DSA close-out of open permits throughout the District.

### **Outside Measure A Contract 3, NMUSD, Newport Beach, CA**

\$680,000 project management services related to the demolition, replacement and/or upgrade of uncertified portable buildings on numerous elementary campuses within the District.

### **K12 Reconfiguration, NMUSD, Newport Beach, CA**

Construction management services for a \$4.6 million (construction value) reconfiguration on multiple campuses, restroom addition at Costa Mesa High School, portable building modernization at Anderson Elementary and restroom upgrades at Rea Elementary School.

### **Cabot Yerxa E.S. Augmentation, PSUSD, Palm Springs, CA**

\$45,800 construction management/consulting services.

### **Consulting Services for the Master Plan, PUSD, Paramount, CA**

\$105,000 consulting services associated with the development of a master plan.

### **Paramount High School East and West Campus, PUSD, Paramount, CA**

\$5 million project management service for Paramount High School addition and renovation.

As Project Executive, Craig provides oversight of the projects and is ultimately responsible for their success in addition to ensuring client satisfaction. He works closely with client representatives, oversight committees, and boards to ensure we meet the specified project goals. He supports our teams throughout all aspects of preconstruction and construction including: estimating, subcontracting, scheduling, accounting, quality, safety, claims management, and day to day challenges. Craig also conducts recurring project reviews with each of our project team members to ensure we mitigate potential schedule delays, cost challenges, and are meeting all contractual obligations and client expectations.

**2014**  
STARTED AT SWINERTON

**1985**  
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## PROJECT EXPERIENCE

### County of Orange Building 16, Santa Ana, CA

The new six-story building features 250,000-square feet of office space. Built with an extensive glass façade, the building is infused with natural daylight. The building also includes a 240-person conference and event center. The entire building sits atop a two-story, 150,000-square foot underground parking structure with 350 stalls.

### LAUSD Roosevelt High School, Los Angeles, CA

A design-build project on a fully occupied campus, 226,773 square feet of new buildings are being built: a 3-story, 78-classroom building; 2-story administration building; and 1-level performing arts center. Work includes demolition of 262,103 square feet with 111 classrooms. New sanitary sewer, storm water, potable water, gas, and electrical systems are also being installed.

### Golden West College Criminal Justice Building

A design-build project, the new Criminal Justice Training Center replaced the existing outdated facility. It brings a state-of-the-art training complex to the college, providing a high-tech campus to train peace officers and support personnel. The new two-story building includes 38,932 gross square feet of academy classrooms, a self-defense mat room, force simulation training room, fitness lab, locker rooms, secure armory, administration space, and a multi-purpose facility. Outdoor areas feature a "grinder" drill area, "Biddle" obstacle course, traffic-stop scenario training street, park scenario training area, infrastructure for the scenario village training area, and a fallen officer memorial. They also demolished the existing 5,205-square-foot Community Center before construction began.

### Costa Mesa Middle School Enclave, NMUSD, Costa Mesa, CA

Taking place on an occupied campus, work consisted of a new two-story, 31,000-square-foot classroom/administration building. It included 15 standard classrooms and four science classrooms, along with additional administration space and multiple restrooms. A Type II-B, fully sprinklered building, it utilized concrete grade beams with a structural steel frame and a concrete on metal deck. The exterior skin is composed of metal studs, brick, plaster, aluminum, and metal panels. A bus turn-around was also created, while significant site work was performed on the parking lot and between existing buildings.

## EDUCATION

B.S. in Construction Technology, California State Polytechnic University, Pomona

## AFFILIATIONS / CERTIFICATIONS

LEED AP

## REFERENCES

Deryl Robinson  
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714.580.8665  
azareczny@nmusd.us

## PROJECT EXPERIENCE (CONTINUED)

### **Newport Mesa Unified School District, Newport Beach, Costa Mesa, CA**

The \$186 million Measure F Phase 2 Bond Program included: two new Performing Arts Theaters, two new Middle School Enclave Buildings, Multiple Modernization projects, and Stadium Projects along with numerous past projects related to Bond Measures F Phase 1 and Bond Measure A. Additional project types included new aquatic complex, pool renovations, gymnasium and art restoration projects.

### **The Source at Beach, Buena Park, CA**

A large-scale mixed-use project, this multi-phase job includes the construction of ten total buildings. Set on 8.5 acres, it is anchored by a seven-story office building that overlooks a three-story outdoor mall. Phase 1.0 includes 300,000 square feet of retail space and 55,000 square feet of office space. Phase 1.5 consists of the 200,000-square-foot Building B, which includes a 1,200-seat movie theater. Swinerton is also building a new 1,900-stall, cast-in-place concrete parking structure on site, with nearly all concrete work self-performed. The mall has many sustainable design features, including rooftop gardens and water conscious landscaping.

### **Arrowhead Regional Medical Center Replacement, San Bernardino, CA**

This \$275 million, 960,000-square-foot hospital's scope included a Nursing Tower, Clinic, D&T, Mental Health Building and Central Plant. The project was completed on schedule and within budget.

### **Kaiser Baldwin Park Medical Center, Baldwin Park, CA**

The \$125 million, 860,000-square-foot hospital included a Nursing Tower, Clinic, D&T, Emergency Room Buildings and Central Plant. The project was completed on schedule, within budget.

### **Huntington Memorial Hospital Phase 1 and 1A, Pasadena, CA**

The \$118 million, 500,000-square-foot hospital project contained a Nursing wing, Clinic, D&T, Operating Rooms and Central Plant. The project was completed on schedule, within budget.

### **3121 Michelson Office Building, Irvine, CA**

This \$35 million, 100,000-square-foot Office Building project involved Core and Shell. The frame was poured in place structural concrete and was self-performed. The Project was completed on schedule, within budget.

### **Kaiser Harbor/MacArthur Medical Office Building PH1, Santa Ana, CA**

This \$35 million, 75,000-square-foot Office Building underwent Core and Shell and T.I. The project was completed on schedule, within budget.

### **Centre Point Office Building and T.I., Hawthorne, CA**

This \$26 million, 75,000-square-foot Office Building Core and Shell project also included a \$5 Mil T.I. The Project was completed on schedule, within budget. Core and shell responsibilities included coordination of specialty T.I. requirements with structural and architectural disciplines.

Mr. Commodore has over 25 years of experience in construction, project management and construction management on a diverse range of projects. He's an accomplished, goal-setting professional with strong project management experience focused on exceeding client goals and objectives. His experience includes managing a wide variety of projects from design through construction completion for public and private institutions, including new construction, renovations, seismic retrofit, and industrial facilities. His experience and expertise includes managing project completion under contractor termination and surety takeover conditions.

## PROJECT EXPERIENCE

### MiraCosta College Oceanside Campus Student Services and Veterans Center

The new Student Services building will consolidate all of the student service functions, currently scattered throughout the campus, to a single one-stop-shop. In addition to allowing the Services programs to grow (to serve a growing student population), this new building will dramatically improve the student experience for both current and prospective students. In addition, the new building will provide improved services to veterans including a comprehensive Veterans Center. Proposed as a two-story structure, the building will allow access and entry from the street level for visitors/prospective students and campus promenade level for current students. \$40 Million.

### City of San Diego, South Ingram Bridge, Pacific Beach, CA

Senior Project Manager. Removal and replacement of existing water main pipelines suspended on the existing South Ingram Bridge, each was replaced with a 16-inch and a 20-inch water main pipelines, including expansion joints, sweeps and hangers. Scope of services included development of project specific document for the client entitled, "Means & Methods - Quality Assurance/Quality Control Program". Other services included review and comment of the Submittals, RFI's, Schedule and overall estimate. Assisted the Client during the preconstruction meeting with the General Contractor, and participated in site visits to assist with the best means-methods to renovate and install the water mains. \$1.3 Million.

### City of San Diego, CIVIC San Diego San Ysidro Seniors Village, San Diego, CA

PM/Lender Representative, San Ysidro is a 3-story, 51 unit affordable senior housing development. Construction is 3-levels of Type V-A construction over a post tension slab on grade. Resident amenities include meeting rooms, a computer lab, laundry facilities, limited surface parking, an outdoor garden space and central courtyard. The project is 100% permanent supportive housing (PSH) containing independent living apartments restricted to residents aged 55 and older. \$9.4 Million.

## EDUCATION

B.S., Business Management, University of Phoenix

A.S., Architecture,  
Don Bosco Technical Institute

## AFFILIATIONS / CERTIFICATIONS

LEED AP

Certified Project Management  
Professional

NAUI Scuba Instructor

Corazon, Inc. Board Member (1996-2004)

## REFERENCES

### Mr. Jose D. Nuñez

Vice Chancellor, San Mateo Community  
College District  
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nunezj@smccd.edu

### Mr. Virgil Stanford

Vice President, Administration, Retired  
Barstow Community College District  
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blueverge@gmail.com

### Ms. Sherry Brooks

Project Manager, CIVIC San Diego  
619.533.7190  
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## PROJECT EXPERIENCE (CONTINUED)

### City of San Diego, CIVIC San Diego Keeler Court Apartments, San Diego, CA

PM/Lender Representative, Keeler Court is a 4-story, 71 unit affordable multifamily development. Construction is 3-levels of Type III-A construction over a Type I-A podium deck. 85 surface parking spaces (including 4 EV spaces), garden space, central courtyard and bicycle storage are included in the project. \$23 Million.

### City of San Diego, CIVIC San Diego Trinity Court Apartments, San Diego, CA

PM/Lender Representative, Trinity Court is a 4-story, 74 unit affordable multifamily development. Construction is 3-levels of Type III-A construction over a Type I-A podium deck. Surface parking for 30 vehicles is provided as well as a bicycle storage building for 10 bikes. Garden space, a community room and central courtyard are among the amenities provided in the project. \$25.5 Million.

### Monarch Beach Resort, Dana Point, CA

Owner's Representative, The project at the Monarch Beach Resort is a site mitigation project with an adjacent property. Represent the Resort in all aspects of mitigation ensuring the guest experience is maintained and both staff and guests are safe at all times. \$150,000.

### USAA, Holden Laguna Niguel Senior Living Community, Laguna Niguel, CA

PM/Lender Representative, Holden-Forbes Laguna Niguel is a 3-story, 110 unit senior memory care/assisted living facility. Construction is 3-levels of Type V-A construction over a Type I-A podium underground parking garage. Parking for 71 vehicles is provided as well as access for emergency vehicles (fire and ambulance) in the below grade parking garage. A center courtyard and protected "memory walkway" is provided for the residents as well as limited commercial/retail space on the lower level of the facility. \$45 Million.

### City of San Diego, CIVIC San Diego, Beta Street Green Alley Street Improvement, San Diego, CA

Project Manager/Lender Representative. Conversion of an existing dirt alley with AC pavement and storm water system. Scope of services included constructability review, preparation of request for proposal for general contractor solicitation and site management. \$361,599

### City of San Diego, CIVIC San Diego, Ouchi Gardens Affordable Housing, San Diego, CA

Project Manager/Lender Representative. A 3-story, 45-unit affordable housing development. Construction is 3-levels of Type V construction over a concrete post-tension podium deck. Project received LEED Gold certification complete with a Title 24 compliant Photovoltaic Thermal and Electrical system at the roof level. Responsibilities included site visits with the client, progress status updates, contract review and analysis, attending site meetings with project team, review of monthly pay applications, verification of work in place, and oversight of all construction documents. \$11.6 Million.

### City of San Diego, CIVIC San Diego, Beta Street Green Alley Street Improvement, San Diego, CA

Project Manager/Lender Representative. Conversion of an existing dirt alley with AC pavement and storm water system. Scope of services included constructability review, preparation of request for proposal for general contractor solicitation and site management. \$361,599

### City of San Diego, CIVIC San Diego, Trolley Residential Affordable Housing, San Diego, CA

Project Manager/Lender Representative. A 3-story, 52-unit affordable housing development. Construction is 3-levels of Type V construction over a concrete post-tension podium deck. Project received LEED Gold certification complete with a Title 24 compliant Photovoltaic Thermal and Electrical system at the roof level. Trolley Residential was also subject to State Prevailing Wage based on Davis Bacon, Section 3. Responsibilities included site visits with the client, progress status updates, contract review and analysis, attending site meetings with project team, review of monthly pay applications, verification of work in place, and oversight of all construction documents.

### City of San Diego, CIVIC San Diego, Encanto Village Affordable Housing, San Diego, CA

Project Manager/Lender Representative. Encanto Village is a 3-story, 66-unit affordable housing development (48-units in Building A, 18-units in Building B). Construction is 3-levels of Type V construction over a concrete post-tension podium deck. Both buildings are mixed use consisting of residential common use facilities and commercial retail/offices for lease to multiple tenants. Project is required to meet LEED Certified standards. Responsibilities included site visits with the client, progress status updates, contract review and analysis,

## PROJECT EXPERIENCE (CONTINUED)

attending site meetings with project team, review of monthly pay applications, verification of work in place, and oversight of all construction documents. \$13.9 Million.

### **Cypress Apartments - Affordable Housing Complex, Affirmed Housing, San Diego, CA**

Senior Project Manager. A 6-story, Type 5 construction over concrete post-tension slab-on-grade affordable housing complex with a total of 63 units each averaging 250 square-feet. Project also included retail and parking with deepened caissons. Project was constructed between two existing high level buildings which complicated the phasing and construction sequence. Responsibilities included managing the bid process, development of scope of work and management oversight of the developer/contractor staff. \$11.8 Million.

### **Barstow Community College District, Performing Arts Center, Barstow, CA**

Project and construction management services on a two-story new performing arts center with seating for 755 and a black box theater seating for 153, plus an 250-seat outdoor amphitheater that included extensive landscaping and irrigation, outdoor site lighting and telecommunications and internet capabilities. The facilities incorporated a main stage, scene service areas, music rooms, dance studio and additional assembly support service areas. The facility also incorporates many energy efficient features including an energy management system. Large areas of window fenestrations provide for an extensive use of natural light to reduce lighting demands within the facilities' main lobby area. The building was constructed using many products have a LEED certification and part of Southern California Edison's Saving by Design Program. \$23 Million.

### **Barstow Community College District, Wellness Center, Barstow, CA**

Project and construction management services on a new wellness center being constructed next to the Jim Parks Gymnasium. Scope of work includes a 20,000 square-foot two-story building that houses a fitness equipment room, classrooms and indoor running track on the second floor. \$12.4 Million.

### **Barstow Community College District, Electrical Upgrade, Barstow, CA**

Project and construction management services on campus-wide electrical upgrades. Scope of work includes replacement of the existing electrical switchgear 5KVS system, and associated transformers, wires and pull boxes. \$350,000.

### **San Mateo County Community College District, San Mateo, CA**

Program Management and Construction Management for Capital Improvements for three bond programs for the San Mateo County Community College District. The Program includes new construction, renovation, modernization, seismic and fire and life safety improvements at the District's three campuses: Cañada College (Redwood City), College of San Mateo, and Skyline College (San Bruno), with nearly 200 different projects over a 20-year program, including over \$600 Million design-build projects. \$1.3 Billion

### **Palomar College, South Education Building, Rancho Bernardo, CA**

Senior Project Manager. Renovation of a 4-story 121,000 square-foot office building and an existing 4-story parking structure. Both underwent major structural, ADA and life safety upgrades to meet DSA code compliance. The building was remodeled to classroom and laboratories. Scope of work also included extensive earthwork, site work and landscape throughout the 12-acre site to create a college atmosphere. Scope of services included preconstruction services oversight including development of the schedule, management oversight of estimators, value engineering, constructability review and management of the procurement process and managed the entire construction process through project completion. \$43 Million.

### **Chabot-Las Positas Community College District, Chabot College, Various Projects, Hayward, CA**

Senior Project Manager. Construction Management services for six projects. Scope of services included meeting with user groups to determine needs, development of scope of work for each trade, solicited bids as required, scheduling support and oversight of construction process with minimal disruption to summer session classes. \$1.5 Million.

## PROJECT EXPERIENCE (CONTINUED)

### **Westwood College, Katella-Douglas, Anaheim, CA**

Project scope consisted new concrete tilt-up construction for the Anaheim campus of Westwood College. Multiple properties were consolidated and rezoned to provide space for this 54,000 square-foot facility and associated site development. \$3.7 Million.

### **County of Riverside, Riverside C.A.C. Annex and Parking Structure, Riverside, CA**

A new 95,000 square-foot, five-story office building seismic retrofit to existing 14 story tower and new 750 stall design/build parking structure. \$31 Million

### **Randolph Street Industrial Warehouse, Alere Properties, Commerce, CA**

Spec concrete tilt-up warehouse building with associated site work. Fully sprinklered ESFR system with improvements designed to facilitate splitting the facility in thirds. \$11.1 Million.

### **Downtown Disney, Multiple Buildings, Anaheim, CA**

12 buildings, 203,000 square-foot of site development that included retail and an entertainment center at Disneyland. Scope of work also included extensive landscaping, including 9 water features, outdoor lighting and decorative concrete and hardscape. \$97 Million.

### **Holly Street Industrial Warehouse, Alere Properties, Colton, CA**

Spec concrete tilt-up warehouse building with associated site work and street improvements. Fully sprinklered ESFR system, spec office build-outs at East and West end of building to facilitate splitting the facility. \$10.2 Million.

### **Hemlock Industrial Facility, Alere Properties, Fontana, CA**

Spec concrete tilt-up warehouse building with associated site work and street improvements. Fully sprinklered ESFR system, spec office build-outs at East and West end of building to facilitate splitting the facility. 49 dock high bays, 3 drive-in bays. Fully concrete paved yard. \$10.6 Million.

### **Industrial Parkway Facility, Alere Properties, San Bernardino, CA**

Spec concrete tilt-up warehouse building with associated site work and street improvements on a 36 acre site. Fully sprinklered ESFR system, spec office build-outs at east and west end of building to facilitate splitting the facility. Includes ½ mile storm drain and improvements through railroad right of way. \$18.6 Million.

### **Moreno Valley Commerce Park Phase I, Alere Properties, Moreno Valley, CA**

First of two spec concrete tilt-up warehouse buildings with associated site work, street improvements, and bio-retention basins. Fully sprinkler ESFR system with improvements to split the facility. \$10.6 Million.

### **Empire Corporate Plaza, Rancho Cucamonga, CA**

Three 2-story concrete tilt-up office buildings with stone veneer, associated site work and street improvements including the undergrounding of overhead high-voltage electrical and communication utilities. \$21.8 Million.

### **Rialto Industrial Facility, Alere Properties, Rialto, CA**

Spec concrete tilt-up cross-dock warehouse building with associated site work and street improvements. Fully sprinkler ESFR system with improvements to facilitate splitting the facility. \$6.5 Million.

### **Heacock Industrial Facility, Alere Properties, Moreno Valley, CA**

Spec concrete tilt-up cross-dock warehouse building with associated site work and street improvements. Fully sprinklered ESFR system with improvements to facilitate splitting the facility. \$14.2 Million.

### **Walnut Valley Commerce Center, Wohl Properties, Walnut, CA**

Demolition and abatement of an existing 60,000 square-foot facility with new construction of four (4) spec concrete tilt-up commercial /industrial buildings, associated site work and street improvements. \$8.1 Million.

## PROJECT EXPERIENCE (CONTINUED)

### **Nash Logistics Center, El Segundo, CA**

Spec concrete tilt-up cross-dock warehouse building with associated site work and street improvements. Fully sprinkler ESFR system with improvements to facilitate splitting the facility. \$2.6 Million.

### **Main Street Distribution Center, Los Angeles, CA**

Spec concrete tilt-up cross-dock warehouse building with associated site work and street improvements. Fully sprinkler ESFR system with improvements to facilitate splitting the facility. \$5.3 Million.

### **Osborne Warehouse Facility, Gainey Development, Pacoima, CA**

A new concrete tilt-up construction for a spec building. Multiple properties were consolidated and rezoned to provide space for this 60,000 square-foot facility. \$3.5 Million.

### **Infinity Broadcasting, Infinity Studios, Los Angeles, CA**

Demolition and abatement of two floors in a 27-story high rise building totaling 100,000 square-feet followed by the construction of new broadcasting facilities consolidating 5 radio stations for Viacom/Infinity Broadcasting of Los Angeles. Structural, Electrical and Emergency back-up features were installed and/or upgraded to ensure station operation during emergency conditions as required by the FCC. \$3.8 Million.

### **Osborne Warehouse Facility Tenant Improvements, Molding Corporation of America, Pacoima, CA**

A complete tenant build-out of a 60,000 square-foot facility for a plastic injection molding business. Process Piping, Process Electrical and new offices were installed in a coordinated manner ensuring that this established client could relocate to the new facility with minimal disruption to current business operations. \$1.3 Million.

### **Fantasyland Tea Cup Rehabilitation, Disneyland, Anaheim, CA**

Complete renovation of the Tea Cup ride at Disneyland. Structural, Electrical and Safety features were rehabbed, installed and/or upgraded to enhance the guest experience. \$150,000.

### **Playhouse Disney, Disney's California Adventure, Anaheim, CA**

Demolition of an existing food facility and conversion to a live stage show venue. Facility is 10,000 square feet. Scope of project included upgrading the exterior facade of the original facility, the construction of a new "art deco" shade structure, placement of decorative concrete and relocation of multiple mature palm trees and other landscaping, all this accomplished without disrupting the "guest experience" at Disney's California Adventure. \$1.8 Million.

### **Winnie the Pooh Merchandise Shop, Disneyland, Anaheim, CA**

A total renovation (abatement, demolition, reframing, custom casework and "show" candy kitchen and the application of multiple themed finishes) of 3 existing facilities. The individual facilities, totaling 6500 square-feet were combined into one new store. \$1.9 Million.

As Assistant Project Manager, Jesse is responsible for the day-to-day administration of the construction project. He supervises the Project Engineer and clerical staff, oversees performance reviews, and directs all field labor onsite. He is responsible for maintaining cost control, preparation of billings, negotiating subcontract change orders, reviewing potential contract changes, maintaining the project schedule, performing takeoffs, writing subcontracts, and making buyouts. He is also responsible for communicating with owner's representatives, while estimating and negotiating owner change orders, RFI's, and submittals.

2018  
STARTED AT SWINERTON

2014  
STARTED IN INDUSTRY

## PROJECT EXPERIENCE

### **LBUSD Jordan High School Classroom Buildings, Long Beach, CA**

A large-scale modernization and redevelopment program was performed campus-wide. Work featured two (2) new two-story classroom buildings totaling 140,000 square feet and major renovations to the 48,000-square-foot historic Auditorium Building and the 7,100-square-foot Band/Music Building. All existing buildings underwent a full interior demolition prior to work. Work also included 300,000 square feet of campus-wide site redevelopment.

### **Manhattan Medical Office Building, Manhattan Beach, CA**

High profile 4-story building on Sepulveda Blvd designed by local Architect in Manhattan Beach.

### **Citrus Valley Hospital Remodel & Expansion, Covina, CA**

Hospital emergency room expansion meant to address the community's growing needs.

### **T-1423 Target Montclair Remodel, Montclair, CA, Montclair, CA**

Complete Store remodel including flooring, MEP upgrades, new finishes, department additions, and new Starbucks within Store, which increased overall sales. A real "win" for the Client and the Contractor.

### **T-1961 Target Eastvale Remodel, Eastvale, CA**

Complete Store remodel with a challenging 2nd entry addition.

### **T-3293 Target La Canada Flex Format (Pre-Construction), La Canada, CA**

Coordinated setting up a milestone Project for the Client. Paving the way for the future of storefront retail. Prominent high visibility Store adjacent to the future Thousand Oaks City Hall.

### **Costco Mira Loma Depot Paving Repairs, Jurupa Valley, CA**

Annual site re-pavement on-site at Costco's Main Depot for Southern California distribution.

## EDUCATION

B.S. in Civil Engineering, California State University, Long Beach

## AFFILIATIONS / CERTIFICATIONS

Engineer In Training (EIT), State of California, May 2013

LEED AP BD+C, OSHA 30-HR, Respirable Crystalline Silica

Procore Online, Bluebeam, On-Screen Takeoff, Sitefolio (Costco), TCPM (Target), Microsoft Project

## REFERENCES

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Rebecca.Ramsdale@verdicalgroup.com  
310.968.4923



Mr. Malek has over 12 years of construction experience encompassing onsite project management as well as scheduling and claims resolution. His experience has contributed to an analytical approach and deep understanding of the complexities of project schedules. As Senior Associate of Scheduling | Claims and as a Scheduling Manager, he supports and manages multiple projects in implementing the best practices to ensure successful completion. His services also includes assisting teams with risk evaluation, dispute resolution and negotiations.

## PROJECT EXPERIENCE

### **West Contra Costa Unified School District, Richmond, CA**

Project and Construction Management Services on a number of projects as well as support management services for the District's bond measures with three projects that utilized the Design-Build project delivery. Additional scope of work includes management and procurement of Furniture, Fixtures, and Equipment and worked closely with the District to create a new Bond Program Procedures Manual to facilitate management and completion of new bond-funded projects. \$207 Million.

### **Judicial Council of California, Administrative Office of the Courts, Superior Court of California, Santa Clara Family Justice Center, Santa Clara, CA**

Associate Project Manager for the State of California, Administrative Office of the Courts. Managed the design and construction of The Santa Clara Family Justice Center that consolidated family law functions from 6 current facilities into a new courthouse building in San Jose, CA that is improving operations and services for the residents of Santa Clara County. The new building is 8 over a basement, 235,000 gross square-feet and provides 20 courtrooms and court support operations for drug, mental health and family law cases. \$185 Million.

### **City of Orinda/Town of Moraga, 2018 Measures J & L Pavement Rehabilitation Project, Orinda and Moraga, CA**

Project Executive. Construction Management and Inspection Services for the City of Orinda and Town of Moraga's Pavement Rehabilitation project. The scope of work includes, Full Depth Reclamation (FDR) of over 50 streets, both Rubber Hot Mix Asphalt (RHMA) and Hot Mix Asphalt (HMA), mill & fill pavement overlays, base repairs, construction of concrete v-ditches, minor concrete structures, curb & gutter, HMA lined swales, storm drain repairs and replacement by open cut and CIPP lining, extensive potholing, utility adjustments, and traffic control. \$15 Million.

### **East County Hall of Justice, Dublin, CA**

Project Executive. A new Design/Build five-story Courthouse and separate two-story County Agency Office building for the District Attorney, Public Defender and Probation, joined by a connecting central lobby/security screening entrance area and elevator Atrium. The 13 courtroom facility includes Court Clerk, Administration, Jury Services, Information Technology, and In-custody Holding. The buildings are

## EDUCATION

Master of Technology Management in Construction Management  
Bowling Green State University  
Bowling Green, OH

B.S., Civil Engineering  
University of Science and Culture  
Tehran, Iran

## AFFILIATIONS / CERTIFICATIONS

Association for Advancement of Cost Engineering through Total Cost Management (AACCE)

## PROJECT EXPERIENCE (CONTINUED)

designed to accommodate approximately 380 employees, and achieved a USGBC LEED Silver certification. Major building materials included glazed curtain walls with metal sun shades, store front glazing and metal insulated wall panels. \$140 Million.

**City of Emeryville and Emeryville Unified School Districts' Emeryville Center for Community Life, Emeryville,** Project Executive. A unique, one-of-a-kind project that combines a K-12 School with a new community library with a host of other functions for the benefit of the community. The District and City jointly occupy the site. This project is the first of its kind of this scale, and implements unique space utilization techniques that represent more than a decade of intricate project planning. In addition to designing a new community library, the project includes general instruction classrooms, meeting rooms, City and District administrative offices, a gymnasium, multi-purpose areas, art and music studios, dance and fitness studios, space for preschool and before and after school activities, technology centers, teacher work areas, parent and teacher resource areas, a health and wellness center, parking spaces, and outdoor space including a soccer field/football field, baseball field, basketball courts, a year-round swimming pool, a running track, gardens and green open space. Project was delivered utilizing the lease-leaseback delivery method and delivery of full design/build of MEP systems. \$90 Million.

### **East Side Union High School District, Districtwide Projects, San Jose, CA**

Project Executive. Comprehensive project/construction management services for districtwide projects that affect all 23 school sites, including: swimming pool reconstruction, energy services contracts (ESCO), security camera systems, fire alarm systems replacement, mechanical (HVAC, Electrical (Switchgear and Electrical Panels) wireless network upgrades and roof replacements, utilizing the design/build delivery method. Scope of services also includes project coordination with stakeholders, school administrators, Division of the State Architect, Board of Trustees, replacement of portable classrooms, building interior renovations, replacements and upgrades of domestic waterlines, exterior painting, site lighting, ADA compliance upgrades to restrooms and interim housing. \$75 Million.

### **Solano Community College District, Vacaville, Vallejo and Fairfield, CA**

Project Executive. Comprehensive Project and Construction Management services for three design/build projects on three college campus sites including: the Biotechnology and Science Building at the Vacaville Campus, the Autotech Project at the Vallejo Campus and a new Science Building at the Fairfield Campus. \$100 Million.

### **City & County of San Francisco Recreation and Parks, San Francisco, CA**

Construction management support services on several park facilities for their two bond programs, 2008 \$152 Million CSNBP Bond Measure and the 2012 \$160 Million CSNBP Bond Measures. Projects include:

- 17th & Folsom Park
- Balboa Park Pool
- Geneva Car Barn and Powerhouse
- Potrero Hill Playfield
- Willie Woo Woo Playground

### **USAA's Western USA Multi-Family Development Portfolio**

Program Manager for USAA's western US multifamily development portfolio from design through construction phases. Managing a team of construction managers acting as USAA's representative at owner/architect/contractor meetings, observing and monitoring development team's performance in managing project budget, contract administration, construction schedule, change management, loan draws, monthly progress payments, and unit turnover to property management.

- Temescal, Oakland, CA. 130 units

## PROJECT EXPERIENCE (CONTINUED)

### Microsoft Redwest Campus Refresh, Redmond, WA

This project includes a full interior refresh of five 150,000-square-foot buildings, which involve the complete replacement of entire HVAC systems, lighting, ceilings, flooring, and restrooms. Each building will also receive the replacement of roofs, new elevator cabs, and the construction of a new restaurant.

### 1545 Pine Street, San Francisco, CA

This condo project is the first to be developed by Pacific Eagle, a Hong Kong based company. Design by Arquitectonica, this project is a \$51 million, 12-story residential building with 100 condo units and two levels of below-grade parking. Swinerton Builders was instrumental in providing significant Value Engineering ideas and assisted in the effort of making changes to the project being mindful of budget constraints. Nestled in a uniquely San Franciscan neighborhood, the units are equipped with high-end amenities and beautiful common spaces for its tenants to enjoy.

### St. Francis Liliha Kupuna Village Phase 2 & 3, Honolulu, HI

This 2-phased redevelopment of St. Francis Healthcare System Hawaii's Liliha Campus is part of the ongoing transformation of the Liliha Kupuna Village. Phase 2 consists of the following five (5) projects: (1) Courtyard; (2) Wellness Center; (3) Mother Marianne Core and Shell; (4) Sullivan Façade, Entry and Porte Cochere; and (5) Materials Management Demolition. While, Phase 3 consists of one (1) project: Assisted Living Facility and Expansion. The projects for Phase 2 vary in scope ranging in the partial demolition of a building, structural retrofit of another, exterior site work, shell package for 2 buildings, exterior courtyard, both exterior utilities and interior mains and an interior renovation. Phase 3 consists of the demolition of the EVS building and the Central Plant, the construction of a 3-story superstructure, some exterior site work, the construction of a new Chiller Plant, new electrical switchgear, new gen-set, new boiler and the interior renovation of the Assisted Living Facility.

### High Desert Health System MACC, Lancaster, CA

A design-build project, the new two-story, 121,100 SF hospital is highlighted by a large ambulatory surgical center. The LEED Gold facility has 76 exam rooms and 34 offices; medical and surgical clinics; adult and pediatric urgent care and primary care; x-ray and imaging labs; laboratory testing; pharmacy; and diagnostic and therapy services. It also includes a 5,600 SF administration building and a 15,600 SF central plant building.

### Lawndale Student Services Building, Lawndale, CA

The new three-story, 115,000-square-foot building features 42 teaching classrooms, a media center, library, administration offices, and security offices. Certified LEED Silver, the Type IIA building is a moment frame structure with exposed structural steel and a curtainwall system. A new outdoor quad with a 5,000-square-foot lunch shelter was also constructed. It is composed of structural steel and metal panels, with twelve 25-foot tall drilled caissons.

### Kalakaua Gardens, Honolulu, HI

Kalakaua Gardens is a 17-story assisted living facility built using both precast and cast-in-place concrete construction. The new facility also includes a 3-level parking garage and office spaces. The Project will include Assisted Living, Memory Care and Skilled Nursing services in 167 units. The building also consists of 3 level above grade parking garage with a total of 78 parking stalls and 2 loading spaces. An additional two-story office building located adjacent to the main Kalakaua Garden facility will also be constructed on the property.

### Pilgrim-Triton II, Waverly Project, Foster City, CA

### South Flores Lofts, San Antonio, TX

### Deer Creek Residential North - Phase I, San Ramon, CA

Section **2**

# Experience



## 2 EXPERIENCE

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### 2.1 NEW CONSTRUCTION/MODERNIZATION PROJECTS

Swinerton Management & Consulting has committed most of our 27 years to partnering with California school districts and community college districts on modernization, renovation, infrastructure and new construction projects ranging from ADA rest room renovations, classroom door hardware replacement to new probable classrooms, and new construction. Below are representative work under management (both new and modernization), as well as past projects that also include new construction and modernization.

Current construction projects include:

#### **Long Beach Unified School District**

Jordan High School  
Millikan High School  
Kettering Elementary School

#### **Los Angeles Unified School District**

Roosevelt High School  
Jordan Starr High School  
Central High School #12  
Sandra Cisneros Learning Academy  
Glassell Park Early Education Center

#### **San Diego Unified School District**

Lindbergh Elementary School  
Scheitzer Elementary School

#### **Downey Unified School District**

Sussman Middle School

#### **Santa Monica-Malibu Unified School District**

John Adams Middle School  
Edison Language Academy

#### **MiraCosta College**

Student Services Building

#### **South Orange County Community College District, Irvine Valley College**

A400 Building

#### **Coast Community College District, Golden West College**

Criminal Justice Training Center

#### **Newport Mesa Unified School District**

Costa Mesa Middle School Enclave, New Construction

#### **Newport Mesa Unified School District (Individual Team Member Experience)**

Newport Harbor High School, Stadium Pre-Construction  
Costa Mesa High School, Stadium Pre-Construction  
Corona Del Mar High School, Stadium Pre-Construction  
Costa Mesa Performing Arts Center, New Construction  
Corona Del Mar Middle School Enclave, New Construction  
Corona Del Mar High School Performing Arts Center, New Construction  
Costa Mesa High School Aquatics Center, New Construction  
Newport Harbor High School Robins Hall/Loats Theater Replacement

#### **San Francisco Unified School District**

New Mission Bay School

#### **West Contra Costa Community College District**

Michelle Obama School, New Construction, West Contra Costa Unified School District  
Richmond High School, New Construction, West Contra Costa Unified School District



## 2 EXPERIENCE

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### **Chabot-Las Positas Community College District**

Chabot Las Positas Community College District Bond Program  
District-wide Prop 39 Interior LED Lighting Upgrade  
Building 2100 Biology Building Annex  
Campus-wide Signage  
Chabot College Fire Alarm System Voice Evacuation  
Facilities Management Office Project  
District-wide Prop 39 Exterior LED Lighting Upgrades  
District-wide Security Exterior Lighting Project  
District-wide Prop 39 Metering Project  
Chabot College Library and Learning Connection  
District Wide Emergency Call Station

### **Peralta Community College District**

Laney College - Locker Room Title IX Improvements  
Laney College - Interim Locker Room  
Laney College - Landscaping Improvements  
Laney College - Aviation School Air Handler Improvements  
Laney College - B120 and G153 Pipe Upgrades  
Laney College - Beginner's Inn Exhaust System Improvement  
Laney College - Forum Women's Restroom Improvements  
Laney College - Mechanical Infrastructure Improvements  
Laney College - Student Center Electrical Phase 1 & 2  
Laney College - Tower Restrooms Plumbing Improvements  
Laney College - Waterproofing Improvements Phase 3  
Laney College - Laney Window Replacement  
Laney College - 860 Atlantic Street HVAC Modifications  
College of Alameda Permanent Power Improvements  
Laney College - Perimeter Paving Rehabilitation  
Laney College - Childcare Improvements 1 & 2  
Laney College - Facilities Storage Shed Restoration  
Laney College - Field House Scoreboard Installation  
Laney College - Aviation School Hanger B Fan Coils  
Laney College - Merritt Rooftop Unit Replacement  
Laney College - DGS Sheriff's Office Flooring Repairs  
Laney College - DGS Chancellor's Restroom Upgrade  
Laney College - Parking Lot Lighting Repairs  
Laney College - Tower Electrical Room Repairs  
Laney College - Best Center Fencing  
Laney College - Arts Center Exterior Electrical Outlets  
Laney College - Welding Department Electrical issues  
Laney College - DW Blue Light Phone Installation-Phase 2  
Laney College - Cosmetology Repairs  
Laney College - TV Monitor Mounting Support Installation  
Laney College - BEST Center Window Replacement  
District-wide General Management Services  
Laney College - Relocation of 36" Waterline for LRC  
Laney College - Library and Resource Center  
Laney College - Relocation of cooling tower for LRC  
Laney College - Theater Modernization  
Laney College - DGS office buildout and Roof Drainage Repairs  
Laney College - Art Center Room 130 Electrical Repairs  
Laney College - Central Utility Plant Upgrade  
Laney College - Elevator Modernization at Tower & Building  
Laney College - Union Bank buildout at Student Center  
Laney College - Carpet Replacement at Library L111  
Laney College - Tower Electrical Room Repairs  
Laney College - Aviation School Hanger B Fan Coils  
Laney College - Merritt Rooftop Unit Replacement  
Laney College - DGS Sheriff's Office Flooring Repairs  
Laney College - Parking Lot Lighting Repairs

## 2 EXPERIENCE

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Laney College - Arts Center Exterior Electrical Outlets  
Laney College Welding Department Electrical issues  
Laney College - DW Blue Light Phone Install.-Phase 2  
Laney College Cosmetology Repairs  
Laney College - TV Monitor Mounting Support Install.  
Laney College BEST Center Window Replacement  
District-wide Childcare Improvements Phase II  
Laney College - Art Center Room 130 Electrical Repairs  
Laney College - Central Utility Plant Upgrade  
Laney College - Theater Modernization  
Laney College - Cooling Towers  
Laney College - Library and Resource Center  
Laney College - Student Activities Center Modernization  
Laney College - Student Welcome Center Modernization  
Laney College - STEM Tower  
Laney College - Welding Exhaust Equipment Anchorage and  
Laney College - Welding Fencing & Storage  
Laney College - Electric Vehicle (EV) Charging Stations  
Laney College - HVAC Maintenance Agreement Management  
Laney College - Laney Pool Maintenance & Repairs  
Laney College - Cooling Unit Repairs DGS Server room  
Laney College - Athletic Facility Improvements  
Laney College - Adm. Complex Mechanical System Evaluation  
Laney College - Fab Lab Relocation

### **San Mateo Community College District**

Canada College- B23  
College of San Mateo- B19  
Skyline College- LOTL  
College of San Mateo- B17  
Skyline College- B1  
Skyline College- B12  
Canada College- B1  
College of San Mateo- B3  
Skyline College- B19  
CIP 3 Program Administration  
District-wide- Fire Alarm Panels  
District-wide- Classroom Sec Hardware  
Canada College- Access Comp  
District-wide- Capital Project Support  
Canada College- B9 Water Intrusion  
Skyline College- B14 Loma Chica  
College of San Mateo- Solar & Energy Storage  
College of San Mateo- B20& 20AHorticultural Demo  
Canada College- B9 Water Intrusion  
Canada College- B9 Destructive Test  
District-wide- Interior LED Lighting Retrofit Project  
College of San Mateo- B3 Theater Upgrades  
District-wide- ADA Transition Plan  
Skyline College-B3 Portables Replacement  
Skyline College-B3 South Wall Waterproofing  
Canada College- B22 Swing  
Skyline College- B1 Facelift  
District-wide- Solar Energy and Storage  
District-wide- Emergency Generator Project  
Skyline College - College Ridge Faculty Housing  
College of San Mateo- Water Tank Replacement  
College of San Mateo- Facelift  
Skyline College- B7 STEM Center  
Skyline College- B3 Flooring Repairs

## 2 EXPERIENCE

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Representative past projects include:

### **San Francisco Unified School District (2013 – 2018)**

Monroe Elementary School  
Lowell High School Design Management  
Miraloma Elementary School  
Sunnyside Elementary School  
Lowell High School- CM Services Phase 1 & 2  
Monroe High School- Modular Bldg CM Svcs  
Miraloma Elementary School- Construction Management  
Sunnyside Elementary School- Construction Services  
SFUSD12 - SOTA/ AAS Design Management  
McAteer Campus- Misc. Projects CM Services  
SOTA/AAS Modernization- CM Services  
R.L. Stevenson Elementary School- DM Services  
R.L. Stevenson Elementary School- CM Services  
Willie Brown Academy- CM Services  
Willie Brown Academy- D/B RFP  
Willie Brown Academy- Demo  
Willie Brown Academy- D/B RFP Closeout  
San Mateo-Foster City School District- CM Services  
Fiesta Gardens and Electrical Estimate  
Baywood Elementary- CM Services

### **Barstow Community College District (2013 – 2016)**

Wellness Center  
Performing Arts Center  
PAC Post-Notice Service  
PAC Financial Review  
Barstow PAC Legal Costs

### **San Carlos Unified School District (2013 – 2016)**

San Carlos School District Pre-Bond Support Services  
Plan Room Organization  
Facilities Master Plan  
Brittan Acres Shade Structure  
District-wide- Program Management Services  
1200 Industrial  
Central Middle School  
Arroyo Bridge  
Heather Portables  
TL Special Ed Preschool  
Heather MU  
CLC Site Search  
1200 Industrial Acquisition

### **South San Francisco Unified School District (2013 – 2015)**

District-wide- PM Services  
CES Solar Projects  
Westborough Modernization  
South San Francisco High School  
Playground Equipment  
Parkway Heights  
Modular Replacements Phase 4  
Modular Replacements Phase 3  
Buri Buri Elementary  
Modular Replacements Phase 2  
Martin Elementary School  
El Camino High School- Modernization  
South San Francisco High School- Athletic Fields  
El Camino- Athletic Fields

## 2 EXPERIENCE

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Alta Loma  
ADA Upgrades

### **Chabot-Las Positas Community College District (2013 – 2018)**

Chabot-Las Positas Community College District Bond Program  
Traffic Signal  
Administrative Services District Office  
Building 1300 HVAC Replacement  
Parking Lots A, B, G & H  
PE Complex  
Building 1400 Industrial Tech  
Building 1200 Drama/Music  
Building 100 Learning Center Renovation  
Las Positas College- Administrative Services  
Building 1700 Math/Science  
Building 1800 Math/Science  
Building 3400 BMW Project  
Small Projects  
Hesperian Landscape Project  
Building 2100 Biology Building Annex  
Covered Walkway  
Campus-wide Signage  
Chabot College- Fire Alarm System Voice Evacuation  
Facilities Management Office Project

### **Cupertino Union School District (2013 – 2017)**

Cupertino Union School District Measure H- PM/CM Services  
Meyerholz Elementary School- Modernization  
Summer 2013 Work  
Data Infrastructure Upgrade Programming  
West Valley Elementary School- Modernization  
Sedgwick Elementary School- Modernization  
Bentley Systems, Inc. (FKA EADOC)  
Regnart Elementary School- Modernization  
Staffing Modifications  
Professional Moving Services  
John Muir Elementary School- Modernization  
Garden Gate Elementary School- Modernization  
McAuliffe Elementary School- Modernization  
PH2 Summer Projects- Modernization  
Blue Hills Elementary School- Modernization  
Devargas Elementary School- Modernization  
McAuliffe- Additional PM/CM Services

### **San Mateo Community College District (2103 – 2015)**

San Mateo County Community College District Measure  
District-wide- Small Projects  
College of San Mateo- North Gateways  
Canada College- Light Pole Banners  
Canada College- Gateways  
Skyline College- Design-Build Program  
College of San Mateo- Edison Lot  
Canada College- Solar EXH29 Proj-391  
Canada College and College of San Mateo LED Fixtures  
District-wide- Utility M&V Project  
District-wide- ESCO Projects  
District-wide- Facilities Planning  
District-wide- Construction Project Management  
District-wide- Roofing & CSM Waterproofing

## 2 EXPERIENCE

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### **San Francisco Community College District (2013 – 2017)**

San Francisco Community College  
District- CM Services  
Chinatown/North Beach Litigation  
Chinatown/North Beach Campus  
Chinatown/North Beach Campus- additional CM Svcs

### **East Side Union High School District (2014 – 2017)**

East Side Union High School District – District-wide:  
Wireless Network Phase 2  
Fire Alarm Upgrades  
Security Camera Upgrade System  
Energy Services Contract (ESCO)  
Swimming Pool Modernization

### **Solano Community College District (2013 – 2018)**

Solano Community College District Program and CM Services  
Fairfield Science Building  
Fairfield Sub-Station #1 & #2 Replacement Project  
Vacaville Center Intersection Improvements Project  
Fairfield Campus Entry Sidewalk Improvements  
Vallejo Center HVAC Upgrade  
Vacaville Annex Renovation Project  
Vacaville Center HVAC Improvements Project



## 2 EXPERIENCE

### 2.2 PROJECT LISTING

Agency	Long Beach Unified School District (LBUSD)		
Contact Name/Title	Tari Fowler, District Project Manager		
Phone Number	562-997-8000 x1330	Email Address	tfowler1@lbschools.net
Project Name	<b>LBUSD Millikan High School</b>		
Scope of Work	Swinerton provided lease-leaseback preconstruction and construction services for a new three-story, 56,000-square-foot classroom building along with a new artificial turf soccer/softball field and student drop-off area.		

Agency	San Mateo County Community College District (SMCCD)		
Contact Name/Title	Jose Nunez, Vice Chancellor		
Phone Number	650-574-6512	Email Address	jnunez@smccd.edu
Project Name	<b>SMCCD - Program and Construction Management</b>		
Scope of Work	Swinerton has provided Program Management and Construction Management services on over 200 projects for this \$896M program that serves three colleges: Canada College, College of San Mateo, and Skyline College.		

Agency	Solano Community College District (SCCD)		
Contact Name/Title	Mr. Lucky Lofton, Executive Bond Manager		
Phone Number	707-863-7855	Email Address	lucky.lofton@solano.edu
Project Name	<b>SCCD Project and Construction Management services for multiple projects for the Solano Community College District's Measure Q Bond Program</b>		
Scope of Work	Comprehensive Project and Construction Management Services for Projects on the main Fairfield Campus, and Vacaville and Vallejo Centers - renovation and new construction.		

Agency	West Contra Costa Unified School District (WCCUSD)		
Contact Name/Title	Mr. Luis Freese, Associate Superintendent Maintenance, Nutrition & Operations		
Phone Number	510-307-4545	Email Address	lfreese@wccusd.net
Project Name	<b>WCCUSD Various Projects</b>		
Scope of Work	Swinerton Management & Consulting is providing Project and Construction Management Services for a number of projects as well as support management services for the District's bond measures.		

## 2 EXPERIENCE

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Agency	San Francisco Unified School District (SFUSD)		
Contact Name/Title	Maureen Shelton, Director of Construction		
Phone Number	415-241-6152 x1527	Email Address	sheltonm@sfusd.edu
Project Name	<b>SFUSD District-wide PM/CM Services</b>		
Scope of Work	Swinerton Management & Consulting has been selected three times by the San Francisco Unified School District to provide comprehensive project and construction management services on their 2006 (\$450 Million), their 2011 (\$561 Million) and their 2016 (\$758 Million) Bond Programs. Scope of services include design management, preconstruction services and managing the construction process on multiple projects.		

Agency	Chabot-Las Positas Community College District		
Contact Name/Title	Mr. Owen Letcher, Vice Chancellor of Facilities and Bond Program		
Phone Number	925-485-5277	Email Address	oletcher@clpccd.org
Project Name	<b>PM/CM Services/Chabot College</b>		
Scope of Work	Swinerton Management & Consulting was selected to provide comprehensive project and construction management services for over 58 projects at the Chabot College Campus.		

## 2 EXPERIENCE

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### 2.3 PROJECT TEAM

#### **Jeff Gee, AIA, Principal-in-Charge**

Mr. Gee has over 25 years of experience leading and directing design, construction and development projects in the education sector and is a licensed Architect. He completed a 13-year tenure with the University of California, Berkeley, where he oversaw the management and implementation of over \$1.5 billion of capital projects, including seismic retrofit of existing buildings, renovations and renewal projects, and construction of new facilities. In addition, in his tenure with Swinerton, Mr. Gee has provided senior leadership management on over \$1.8 billion of K-12 and community college projects. As the Principal-In-Charge on this Team, he will provide operational and senior management support to ensure the success of your Program. He will attend key meetings, participate in any partnering sessions and ensure that we commit the full attention of Swinerton's senior management to guarantee the success of our services.

#### **Bonnie Martin, Best Practices Leader**

Bonnie brings over 25 years of construction industry and DSA experience to the project. Her background is well suited for the project, as she has been responsible for the oversight of the financial outcome and success of multiple projects and construction management programs. She is well versed in integrated project delivery methods, including Agency Construction Management, Lease-Leaseback, Design-Bid-Build, Design-Build, and CM-at-Risk with Higher Education and Public Works clients. She supports the clients and project team in every aspect of pre-construction and construction, including: estimating, subcontract negotiation, reporting, scheduling, accounting, quality, safety, claims management, and closeout. She encourages open communication directly with the District's team, and leads presentations for oversight committees and boards. Her experience on education projects/programs will greatly benefit this project; they range in size from \$3 million to \$280 million, with an average oversight of \$150 to \$200 million at one time.

#### **Craig Scaringi, Project Executive**

Craig provides oversight of the projects and is ultimately responsible for their success in addition to ensuring client satisfaction. He works closely with client representatives, oversight committees, and boards to ensure we meet the specified project goals. He supports our teams throughout all aspects of preconstruction and construction including: estimating, subcontracting, scheduling, accounting, quality, safety, claims management, and day to day challenges. Craig also conducts recurring project reviews with each of our project team members to ensure we mitigate potential schedule delays, cost challenges, and are meeting all contractual obligations and client expectations.

#### **Joe Commodore, LEED AP, PMP, Senior Construction Manager**

Mr. Commodore has over 25 years of experience in construction, project management and construction management on a diversity of projects. He's an accomplished, goal-setting professional with strong project management experience focused on exceeding client goals and objectives. His experience includes managing a wide variety of projects from design through construction completion for public and private institutions, including new construction, renovations, seismic retrofit, and industrial facilities. His experience and expertise includes managing project completion under contractor termination and surety takeover conditions.

#### **Jesse Martinez, Assistant Project Manager**

Jesse's responsible for the day-to-day administration of the construction project. He supervises the Project Engineer and clerical staff, oversees performance reviews, and directs all field labor on site. He is responsible for maintaining cost control, preparation of billings, negotiating subcontract change orders, reviewing potential contract changes, maintaining the project schedule, performing takeoffs, writing subcontracts, and making buyouts. He is also responsible for communicating with owner's representatives, while estimating and negotiating owner change orders, RFI's, and submittals.

#### **Ramtin Malek, Scheduling Manager**

Mr. Malek has over 12 years of construction experience encompassing on site project management as well as scheduling and claims resolution. His experience has contributed to an analytical approach and deep understanding of the complexities of project schedules. As Senior Associate of Scheduling | Claims and as a Scheduling Manager, he supports and manages multiple projects in implementing the best practices to ensure successful completion. His services also includes assisting teams with risk evaluation, dispute resolution and negotiations.

Please refer to the resumes in Section 1.3 for more details on the qualifications and relevant experience of the aforementioned staff assigned to this contract.

## 2 EXPERIENCE

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### **ADDITIONAL RESOURCES**

Our Program Team will also be supported by our in-house Swinerton resources; experts are available to answer and address any need that may develop on the District's Bond Program. The following expertise is available to our Team:

- Estimating and Scheduling
- Building Information Modeling
- Alternative Delivery Methods
- Procurement
- Information Technology (IT)
- Project Labor Agreement/Project Stabilization Agreement
- Sustainability/CalGreen
- Alternative Energy
- Insurance
- Legal/Risk Management
- Industrial Hygiene
- Storm Water Protection Plan (SWPPP)

### **BEST PRACTICES/LESSONS LEARNED**

We have formed an internal "Program Advisory Committee" comprised of Program, Project and Construction Managers who are currently working on educational facilities. The Advisory Committee will be a resource to our Project Team on such issues as best practices, lessons learned, collaboration, operational reviews and audits. We will hold periodic roundtables with the committee and the project team to share experiences and exchange ideas and/or solutions, and consult on a variety of issues and challenges

## 2 EXPERIENCE

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### 2.4 PUBLIC WORKS REQUIREMENTS

With our extensive California K-12 and local Orange County experience, the Swinerton team has an unparalleled understanding and knowledge of how to work closely and efficiently with multiple stakeholder agencies and departments including DSA, CDE, DTSC, CEQA, and OPSC. Additionally, as a local Construction Manager and General Contractor, Swinerton has significant experience and a strong working relationship with local authorities including the Orange County Fire Authority, the Coastal Commission, County of Orange, City of Costa Mesa, City of Newport Beach, and the local utility agencies.

Our experience has led to procedures that allow Swinerton to identify and resolve potential issues that causes DSA or other agencies to reject plans, policies, or procedures. With this in mind, Swinerton works closely with the Architect and NMUSD to make sure that the plans and procedures presented are well prepared, and that the Contractor and Subcontractors are in full compliance. We know the process, the individuals, and the operational aspects which are required to make the project a success for both NMUSD and the stakeholder agencies.

We have a high degree of knowledge of their procedures, rules, regulations and have been able to utilize these ties to establish best practices and to expedite the review process or work through issues during construction. Some examples of our expertise with agency coordination include the following key agencies:

#### OFFICE OF PUBLIC SCHOOL CONSTRUCTION (OPSC) AND STATE ALLOCATION BOARD (SAB)

The Swinerton team is very familiar with the Office of Public School Construction (OPSC) and the State Allocation Board (SAB). Our experience spans from the State School Facility Program procedures, Emergency Repair Program, State Relocatable Classroom Program to the Deferred Maintenance Program. Swinerton understands the process and has the ability to assist the District in determining and acquiring eligibility for State funding of new school construction and/or modernization of existing facilities. Our project staff and estimating team can prepare the necessary State paperwork required as part of the OPSC, DOE and SAB process to assist in obtaining the maximum School Facility Program funding. Swinerton is also up-to-date with the most recent OPSC mandated pre qualification process related to specific funding vehicles and is equipped to assist the District in this process to pre qualify subcontractors, if requested.

#### DIVISION OF STATE ARCHITECT (DSA)

Since the establishment of the Field Act over 78 years ago, which mandated the Division of State Architect's oversight and standards for K-12 design and construction, Swinerton has maintained a close working relationship with the Division of State Architect. We understand and respect the processes and regulations that govern our projects and at the same time have developed a collaborative team relationship with DSA that has assisted in resolving critical and time sensitive challenges in an expedited manner during both design and construction to ensure success for our K-12 clients.

Swinerton also understands the need to stay current, as DSA processes and regulations change over time. We utilize all available resources to make sure our team members stay up to date and understand the current governing parameters and project procedures. Through the Coalition for Adequate School Housing, Swinerton staff has served as expert panelists on a number of DSA workshops related to K-12 deliveries, closeout and team building.

#### DEPARTMENT OF TOXIC SUBSTANCE CONTROL (DTSC)

Swinerton understands DTSC's responsibilities as a State Agency, for assessing, investigating and cleaning up proposed school sites. We will work with the District to ensure that the selected property is free of contamination or, if the property was previously contaminated, that it has been cleaned up to a level that protects the students and faculty who will occupy the schools. We also understand the DTSC regulations and testing procedures for the import and export of soil and will coordinate the credentials and documentation of the selected soil, host site and or dump site.

#### CALIFORNIA DEPARTMENT OF EDUCATION (CDE)

The California Department of Education (CDE) provides oversight, review, and approval for site and plans for K-12 schools and its mission to provide school districts with creative learning environments that are well planned, clean, safe and up to date for kindergarten through high school campuses. Swinerton has coordinated both new construction and modernization projects to verify consistency and that CDE requirements are met during both preconstruction and construction.

## 2 EXPERIENCE

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### 2.5 DISTRICT CONTRACTS

Swinerton Management & Consulting has not held any contracts with Newport-Mesa Unified School District. However, Swinerton Builders, our general contracting division, has held a contract with the District.



Section **3**

# Project/Cost Management



# 3 PROJECT/COST MANAGEMENT

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## 3.1 PROJECT MANAGEMENT

### Planning and Coordination of Capital Program Projects

Our approach to managing construction bond programs for educational facilities is developed through a series of reviews of District-provided information and inquiries with the District. Since the District has already established a Facilities Master Plan, Education Plan and Program Procedures (with Swinerton's support), we would look to review all documents and then ask a series of questions to ensure that all the appropriate decisions have been made for a successful implementation. Inquiries and questions we would pose include:

#### Strategic Direction

Ensure that the core values and priorities of the Board are clear. The Board's vision on a number of facility issues is required to ensure that the continuation of the bond programs are implemented in alignment with the Board's values.

#### Facilities Assessment

Prior to the conducting any design work, confirm that an assessment has been completed on the status of the District's facilities. These inquiries may include:

- Are there any DSA (Division of the State Architect) files open? DSA will likely require that any open files be closed first, before accepting any new plans and specifications for renovations or modernization of existing facilities?
- Are facility as-built drawings available and accurate?
- Are hazardous material assessments complete and up-to-date?
- Will any seismic studies be required?
- Are site utilities clearly documented?
- What is the condition and capacity of site utilities (e.g., power, gas, water, etc.)?

#### Planning

- District Standards: Design, Maintenance, Information Technology, Space Standards
- Tailor Construction Contract Division 0 and 1 to the District
- Local Hire/Workforce
- Project Delivery Strategies
- Bond Spending Plan/Cash Flow Projections
- Program Schedule
- Collaboration
- Communication

#### Implementation

- Procedures Manual
- Procurement
- Design Teams
- DSA Permitting
- Pre-qualification
- Construction
- Close-out / Commissioning
- Reporting/Communication

### Bond Program Review and Program Infrastructure

Before significant implementation continues for Measures D, E and R Bond Program, we believe it is critical that the management infrastructure be reviewed and established early. Review of District-provided information, Bond program reviews, reporting control mechanism, procedures and protocols need to be defined clearly and documented. Computer applications and systems need to be evaluated, assessed and a selection made, then implemented.

An important element of this phase of work is the delivery of a Program Definition Document. The Program Definition Document is the blueprint for moving forward with the implementation of the Bond Program. Budgets, schedule, and project delivery methods/strategies are identified for each project in the program.

# 3 PROJECT/COST MANAGEMENT

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## **Our Communication Style**

The essence of our management approach is to develop strong synergy and collaboration. By establishing a fully integrated team of dedicated and experience design and construction professionals, we not only have the technical expertise required, but we develop the relationships and trust that allows the participants to challenge ideas without challenging people. To establish a solid foundation of trust, we would suggest incorporating the following principles:

- Engage the District Stakeholders, the Design Team and all Consultants - bringing our expertise to the table while being flexible in our approach and introduce and open to new ideas.
- Actively participate in the entire process.
- Utilize active listening skills.
- Understand and embrace the District's expectations, vision and project requirements.

## **Pre-Construction Related Services**

Decisions made during preconstruction will have a significant impact on the projects' overall success. Project goals are defined and reinforced. Many conceptual design and estimating exercises may be repeated to ensure that the projects meet District requirements. As your Program and Construction Manager, we will take a proactive role in providing the information necessary to make the best business decisions for the projects. During the preconstruction process, our participation in schedule, cost and value management can provide you with the greatest value for our services.

## **Planning and Design Budget Management**

One of the most important keys to successful projects is the quality, accuracy, and completeness of the design phase. Correcting design issues during the construction phase is not a recipe for success, especially for public owners. Missing scope discovered during the construction phase can only lead to disappointed stakeholders, expensive change orders, delayed completion dates, and loss of credibility for District Staff.

As former "Owners" we have had to explain to Chancellors, Presidents, Board of Education and Trustees how and why expectations were missed. Our experience on the "Owner's side of the table" provides us with great empathy as to the demands and expectations of District staff, and lessons learned in managing the project development process. Our organization is built on "cradle to grave" program development. We know that if the design phase is not managed well, the consequences of fixing problems during construction can be significant.

## **Design Management Philosophy & Approach**

Our philosophy on managing the project development and design phase is based on providing the leadership to bridge needs, wants and desires of stakeholders, translate and confirm these desires into tangible and actionable items, to communicate to the Design-Build team, and to review and manage for successful outcomes.

### **LISTENING**

Asking questions and listening carefully to the needs, desires and wants of stakeholders.

### **CONFIRMING**

Confirming back to stakeholders that the Team heard what they said.

### **TRANSLATING**

Translating stakeholder needs, wants and desires into design direction that aligns with budget, schedule and State standards.

### **DOCUMENTING**

Providing written documentation on the design direction, issues, tasks so that they are not lost.

### **TRACKING**

Making sure that issues and tasks are followed up on.

### **REVIEWING**

Making sure that issues, tasks, and directions have been completed.

### **FEEDBACK**

Bringing closure to all members of the Team, including stakeholders.

# 3 PROJECT/COST MANAGEMENT

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## Communication During the Design Process

Clear communication and open dialogue between all the Team members forms the basis for the success of any project. Identifying a "core team" of regular participants representing the various stakeholders will be important. The process starts with a constant feedback loop, reinforcing the iterative design process. The key is to continue to refine the design with the entire group, and to communicate the evolution of the project in a way that everyone can "buy in" to. The follow-up and timely distribution of meetings notes is essential.

Setting proper expectations, as well as providing a consistent message about priorities, helps keep communication open and honestly. In addition, the communication of the schedule on a regular basis helps to address milestone decisions in a timely manner. Inevitable roadblocks will surface, but a reminder about the priorities and goals for the project is one way to bring the group back to consensus.

## Budgeting & Cost Estimating

We have extensive experience with educational projects, including budgeting and estimating projects for both new construction and improvements. We will prepare project budgets and cash flows to include both preconstruction and construction activities and costs. The budgets will identify both construction costs and 'soft costs' (design fees, permit costs, etc.). The budget and cash flow projections will be continually updated.

There are several tools and techniques that we employ to manage project budgets/estimates, and to avoid budget overruns. These tools and techniques include:

- Project Budgeting
- Budgeting for Contingencies
- Forecasting Market Conditions
- Bid Alternates
- Evaluating Owner Unspecified Allowances
- Managing Total Project Exposure

**Project Budgeting.** With our substantive experience in managing and delivering public projects, we have developed an extensive database of comparable project costs. Validating a project budget at the earliest possible opportunity establishes a firm foundation for project success. A poorly estimated project will never be successful.

**Budgeting for Contingencies.** Along with proper budgeting is a need to establish an appropriate contingency to account for unknown or unaccounted factors. For every unknown project element, funds should be budgeted until a point in time where sufficient investigation or discovery can be conducted to reveal a factual or existing condition.

**Forecasting Market Conditions.** Identifying trends early and forecasting accurately is critical to the development of project budgets. State indexes, such as the CCI, are not accurate indicators of market conditions.

**Managing Total Project Exposure.** Throughout the design and construction process, another key to avoiding budget/estimate overruns is to manage Total Cost Exposure. Whenever a potential issue arises during design or construction, our staff is trained to track the issue and to budget funds to address this issue until it is resolved. This ensures current financial information along with forecasted costs are presented when key or critical decisions are required.

## Value Engineering

Value engineering is a process by which we identify when a significant contribution can be made to reduce costs, speed construction, or enhance a project's value. It is not "cost cutting". We believe the appropriate time to perform this function is early in the project. Therefore, we review the design of the project at each stage to assure that it is the most cost effective design possible and is consistent with the project goals. We will provide recommendations to the District on an ongoing basis so that these recommendations can be evaluated in a timely manner. In all cases, we will seek to find possibilities to improve quality, expedite schedules and optimize costs.

## Constructability Reviews

Having extensive experience with the construction process, we look at design drawings with a view to how we can best improve construction methods by constantly evaluating alternatives for materials, systems, installation and equipment, in order to achieve both time and cost savings. We will perform constructability reviews of progress design and construction documents. Each discipline, architectural, civil, structural, mechanical and electrical, etc., will be examined for potential alternate design solutions. Our constructability reviews will also address potential construction logistic issues, such as site access restrictions and temporary routes of travel requirements.

# 3 PROJECT/COST MANAGEMENT

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## Scheduling

The Master Program Schedule is one of the most critical elements in the planning process. To ensure accuracy, Swinerton utilizes the Critical Path Method (CPM) in preparation and maintenance of the overall master program schedule. Scheduling the planning, design and construction process is a vital tool in both the daily management and reporting of each project's progress. Recognizing this importance, Swinerton will act as the "Team Leader" in the preparation and maintenance of the project schedule.

Each schedule is prepared with input from the District, Architects and all Team Members. Special consideration will be given to ensure that the Academic calendar is incorporated into the overall schedules, and that the work is phased to minimize any impact on businesses and community. The schedule also includes resource information identifying the cost of activities and the labor requirements. The schedule includes detailed activities for all Program Team members, including:

- District Responsibilities and Requirements
- Architect's and Engineer's Timeliness and Deliverables
- Agencies with Approval Authority
- Permit and Inspection Requirements
- Funding Requirements
- Contractor and Vendor Awards, Submittals and Construction Activities
- District Approvals

**Monthly Status Updates.** To maintain proper control of the schedule, it is necessary to status each project to an as-built condition at least once a month and more frequently if the situation warrants.

**Adjusting Through Problem Recognition & Logic Enhancements.** The team must be able to recognize impacts, track the logic back to the source of the issue and to make the proper logic and duration adjustments. Adjustments may require acceleration and addition of more detail to work around the problem or issue.

## Implementation of Project Document Control Systems

The District's Information Management System, ColbiDocs, streamlines many of the processes encountered in typical construction programs. The system will allow users to filter and sort through document management processes including:

- Contractor, A&E and Other Consultant Billings
- Permit Tracking (DSA approvals)
- Bid Distribution and Management
- Meeting Minutes
- Daily Reports
- E-mail correspondence
- Program/Project Team Directories
- Punch Lists

These reports can be accessed and updated daily, and will be summarized in Swinerton's standard Monthly Report to the District. Critical documents and information can be developed both online and offline and then stored within a networked server (coordinated closely with District IT staff). This allows program team participants to retrieve information from these critical documents within seconds. Common published documents include:

- Plans and Specifications
- Project Budgets
- Project Schedules
- Bid Documents
- RFI and Submittal Logs

## Bidding/Award Phase Services

Our recent and successful experience, as both a Program Manager and Project/Construction Manager has shown us there are a variety of options to consider in the development and issuance of bid documents. We will explore all options and make recommendations regarding bid strategies.

**Pre-Bid Conferences.** We will conduct pre-bid conferences for all prospective bidders. We will also coordinate bidder inquiries and their responses to assure accurate and timely distribution of key bidding information.

**Bid Alternatives.** A significant tool for avoiding cost overruns is the use of bid alternates. Bid alternates may be either additive or deductive, and can involve Owner allowances. The use of alternates at bidding can avoid the loss of time if bids exceed budget and need to be re-scoped and re-bid.



### 3 PROJECT/COST MANAGEMENT

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**Competitive Bidding & Outreach.** A key to avoiding project cost overruns is to develop all inclusive competitive bid documents. As a provider of PM/CM services on education projects in the Bay Area, one of our key roles is to conduct outreach to the construction community. These could include presentations to professional organizations, outreach efforts to contractors, continuous and regular communication with contractors, and working with the District to ensure that they are perceived as an “attractive client” to the construction community by avoiding onerous contract language, paying timely, and making timely decisions on change order requests.

**Prequalifying Contractors.** Swinerton has extensive experience prequalifying contractors that best suit the project demands. If the District so desires, we can work with District Staff to revise or develop a prequalification questionnaire that identifies a capable contractor pool. In order to accomplish this, it will be necessary to not only advertise, but to directly solicit contractors to participate in the prequalification process.

#### **Construction Phase Services**

Our experience in managing the construction process is extensive. As a construction-based, program/construction management company, we bring over 133 years of building and management experience to the District.

**Putting Tools in Place to Manage the Construction Process.** It is important to structure Division 0 and 1 of the Specifications to provide tools with which to manage the contractor(s). Typical site management procedures may need to be abbreviated, multiple shifts may be required and site management staff for critical items may need to be specified. Swinerton will be looking ahead of the actual work in the field. We must anticipate issues before they arise, develop a solution and convey it to the appropriate parties. It will be Swinerton's priority to ensure that the contractor(s) schedules are updated at appropriate intervals to reflect necessary adjustments and that those updates represent realistic logic, labor projections and durations.

**Organization/Lines of Authority.** We can assist in establishing onsite organization and lines of authority to execute the projects in a coordinated and efficient manner.

**Working with the Design Team During Construction.** In order to effectively manage budget and schedule during construction, it is essential to work with the contractor(s) to insure that construction administration responsibilities are met. In order to provide seamless coordination throughout the construction process, we will manage a number of key processes, in a collaborative and communicative manner.

**Construction Support.** During the construction phase of the project, we will provide administrative management and relate services necessary to adequately supervise, monitor and coordinate the work. Our goal is to communicate fully with all team members so that there are “no surprises.” To achieve this goal, we will work with District Staff, Consultants and contractor(s) to develop a collaborative process for the project. As part of the Session, regular intervals are scheduled to assemble the group to review their original goals and objectives. These scheduled sessions serve to reinforce the commitment and resolve of the firms involved to the success of the project.

**Project Documentation.** Accurate and complete records of events, discussions and decisions made throughout the course of the program are critical in reporting and responding to informational requests. It is also essential in responding to requests for additional time and money from contractors. Thorough documentation will make it easier for our team to determine a fair adjudication to any such request.

**Meetings.** We will chair and record weekly project meetings with the District's Representative, the design team, the IOR, the contractor and all necessary parties. We will chair all other meetings required by the District. Project procedures, progress, challenges, scheduling and any other issues will be discussed during these meetings. Meeting minutes will be produced and distributed to all attendees and other designated individuals accordingly.

#### **Change Order Management & Administration**

A good understanding of the construction process is a prime ingredient for success in claims avoidance, requiring the participation of all program team members throughout the life of the projects. Claim management starts in the preconstruction phase by ensuring that complete and accurate documents are issued for bidding purposes. We review proposed design changes and seek alternates, if possible, to eliminate and/or mitigate any extra costs.

In addition, we maintain and record in detail daily project operations, particularly with regard to the schedule, manpower productivity, deliveries and delays. All change order requests will be logged in and tracked. Depending on the nature of the change, an impact assessment will be performed. Should a change order or claim arise, this review will be the basis for development of a course of action for deposition of the claim. We will prepare a fair cost estimate as a basis of negotiation and will propose a recommendation for the final negotiated amount. Rather than delaying settlement discussions to the end of the program/project, we pursue a fair resolution in a timely fashion during the course of construction when these claims are more manageable.



# 3 PROJECT/COST MANAGEMENT

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## **Quality Assurance/Quality Control (QA/QC)**

Construction quality begins before the Design Team begins any design work. Quality starts with District standards and guidelines and ensuring that the District's Division 0 and 1 prescribe quality as an achievement to be accomplished during construction. If the construction plans and specifications do not have quality built into them, it will be very difficult to achieve quality throughout the construction process. Towards this goal, Swinerton is committed to quality, and has a corporate champion dedicated to construction quality. The role of our Quality champion is to ensure that our major programs and assignments have recommended QA/QC specifications, that projects have quality assurance plans, and that staff is properly trained. A number of our staff are graduates of various quality assurance programs including the Corps of Engineers (USACE) and the Naval Facilities Command (NAVFAC).

Swinerton's commitment to quality starts at the corporate level with a full-time dedicated champion of QA/QC. This commitment to quality includes our Intranet that is built around sharing - sharing lessons learned, recommended practices, training and templates to achieve quality during construction. Every Swinerton employee has full and complete access to all of Swinerton's resources and tools from our Teams across the western United States. These best practices allows our Team to bring the District the lessons learned from our many Teams. As Program, Project and Construction Managers, our responsibility is to recommend to our clients, and to work with the design teams to ensure that quality is built into the construction plan, specifications and construction contract.

## **Community Involvement**

At times, the process of design and construction can be heavily influenced by the neighbors in the area. A neighborhood outreach program should be developed with a "road show" that includes design elements, even during development. On the new Chinatown/Northbeach campus for CCSF, we conducted and led monthly community meetings to inform community stakeholders of the state of the project, identify potential community issues, e.g., parking, noise, lane closures and answer questions of concern. On the College of Marin's Kentfield Campus, we developed a relationship with a large community group that had been very vocal with the Board of Trustees. Through regular meetings, the team was able to bring a design forward that met the needs of the campus, as well as responded to concerns about height, bulk, style and color, expressed by the neighborhood. While not every neighbor was completely satisfied, the communication feedback loop provided a forum for interested parties to express their opinion and to come to terms with the design.

## **Communicate And Communicate - Community Outreach And Coordination**

Another important element of success is communication. The impacts of construction - noise, dirt, vibration and traffic are unavoidable. However, our experience has been that tolerance levels are much higher if everyone knows in advance what and when construction activities will be occurring. In partnership with District and its Consultants, we will develop a plan for community outreach. In addition, we will work with the District and appropriate cities to define construction routes and recommend that these routes be included in the construction plans and specifications including specific consequences if construction vehicles stray from designated routes.

Feedback and closure is required at all levels: with the District, with the Design Teams, and with stakeholders. Staying in constant contact and developing relationships with District Staff is important in setting up the right collaborative tone. We have found that when we communicate timely with key stakeholders, we can best manage expectations. We would also look to:

- Meet with Principals at each School to better understand their needs.
- Meet early and often with the appropriate reviewing agencies.
- Understand and work within the school schedule.
- Meet with Facilities Operations Staff.
- Create opportunities for proactive solution to solving problems.

Just as importantly, we understand the diverse communication and information needs of all project stakeholders; Trustees, Administrators, Principals, Teachers and Parents. With this understanding, we will use technology to put appropriate information on projects in the hands of the various stakeholders.

## **Experience With Sustainable "Green" Construction**

The Swinerton Family of Companies has long recognized the importance and value of employing design and construction practices that conserve resources, reduce waste, and create healthier and more productive built environments. This long-standing commitment to the environment has resulted in industry recognition that Swinerton is a leader in green building. Our corporate commitment is embodied in our Green Mission:

- Preservation of Natural Resources
- Cost Effective Green Solutions
- Waste Reduction and Recycling
- Continuous Education and Training

# 3 PROJECT/COST MANAGEMENT

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From our Chairman to our frontline project teams, we demonstrate our commitment through our successfully completed Green projects, including our own headquarters building in San Francisco, which has received Gold LEED-EB (Leadership in Energy and Environmental Design for Existing Buildings) certification from the U.S. Green Building Council. Our building in Concord hosts arrays of solar panels that provide the majority of each facility's power.

Swinerton's Green Building Team of over 340 LEED accredited professionals is continuously researching and implementing new Green products and technologies that save initial construction costs and reduce ongoing energy consumption. The committee works hand-in-hand with design, project and estimating teams to provide practical, cost-effective Green solutions, which include product specifications, availability, pricing, constructability, and life cycle costing.

Our Scope of Services includes:

- Strategic Visioning to Establish and Achieve Sustainability Goals
- Initial Assessment of Project and Program Requirements
- Sustainability Program Development, Training and Implementation
- Optimization of Current Facility Operations
- Cost Estimating, ROI and Constructability Reviews
- Construction Document Review for LEED Compliance
- Management of LEED Program Documentation and Certification
- Energy Modeling and Virtual Design & Construction (BIM) Services
- Coordination with Public Agencies to achieve Sustainability Goals

## Financial Controls

**Tracking Program-Wide And Project Specific Cost Reporting With Multiple And Different Funding Sources.** Swinerton works closely with our clients to understand the financial systems they use and to build reporting mechanisms around those systems and the needs of the Program. In many cases, there are multiple funds combined for a single project, and in others, a single fund will cover multiple projects. For this reason, a client's financial system alone may not be able to track expenditures well enough to manage the Program. If this is the case and if so desired by the District, Swinerton can work with the District's IT department to see if there are some system programming modifications that will enable the financial system to generate reports needed to support the bond measure, or we may propose alternative external cost tracking and reporting tools. Such tools may include a series of linked workbooks that list each specific expense up to a snapshot summary of expenses and encumbrances. In any case, the cost tracking and reporting tool will be built around the capabilities of the client's financial system and the needs of the Program.

On typical program management programs, we holds monthly fund review meetings with our clients to discuss current and upcoming encumbrances, fund balances, new sources of funds, and expiration dates. These regular meetings serve to reinforce the fact that funds are expiring and work needs to be scheduled accordingly. In addition, these meetings provide a forum for discussion of specific conditions or required scope, if any, attached to a particular fund source. Attendees usually include the District staff, the Program Manager, and the Financial Controls Manager, with additional attendees as circumstances require.

## Account-Ability

Recently we've been utilizing Account-Ability, a program specific in managing bond programs. The program brings many attributes, including:

### FUNCTIONALITY

- Built to manage multi-fund, multi-year bond programs
- Manages fiscal-year budgets , as well as multi-year commitments, contracts and warrants
- Capability to manage cash flow within drawdown schedule (corroborates Program schedule)

### FLEXIBILITY

- Real time, web-based transparent access with role-based security control
- Interface with Banner:
  - Two-Way
  - Download warrant and PO information from Banner to Account-Ability
  - Two independent systems
- Initial Setup – Collaboration, efficiency, existing accounting codes

### REPORTING

- Wide variety of standard financial reports
- Customized for District's needs and Stakeholders
- Sample Reports

# 3 PROJECT/COST MANAGEMENT

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## CONCLUSION – what it means for the District

- Transparency, consistency, accuracy
- Tool for program planning and forecasting
- Accountability of public funds for District and Community
- Never put District's funding at risk by missing a milestone date or other requirement (reporting or specific use)

## Procurement

Our experience on both the Owner's and Contractor's side of the procurement process is a great advantage. Our Team will work collaboratively with the District's Procurement Staff to follow and enhance programs already established by the District. Our Team of seasoned professionals are familiar with the Governmental Code Rules and Regulations. All Team members have experience on projects involving public education procurement process. The graph below illustrates a typical early procurement process. The advantage to early procurement is the potential for cost savings and the pre-purchase of long lead items.

## Permitting & Approvals

Throughout both the programming, preconstruction and construction phases, we will provide the communication interface with the regulatory and utility authorities associated with the projects by administering the application submission, approval, engineering, permitting, inspection and occupancy approval processes. We will facilitate communication and decision-making with all regulatory agencies such as DSA and all other agencies as required.

## Testing & Inspections

We will administer the requirements for the testing and inspections as required by the contract documents. We will produce a detailed schedule and will monitor and coordinate these activities throughout the construction and close-out of the project.

## Job-Site Inspections

While it is the responsibility of District-hired DSA certified inspectors to inspect the work, it is SMC's policy to have our field staff observe the work as it's being done to ensure compliance with project documents and industry standards regarding workmanship, fit and finish. We will create a positive work environment where inspections become a planned part of every work process. SMC will also make sure that we are copied on all trip reports generated by the Regional DSA Inspector.

## FF&E Items

Successful projects require careful coordination of all project elements. We believe that our role includes assisting in the coordination of FF&E (fixtures, furniture and equipment) items. If desired by the District, we can contact the furniture vendors at the project inception and make the appropriate allowances on the project schedule. In so doing, we can assist in scheduling of critical items.

## Move Management And Interim Housing

We understand the sensitivity and complexity of working on occupied school sites in and around children. We will assist with any move management and interim housing requirements and insure that staff, parents and the community are kept informed of any changes in their day-to-day activities.

## Payment Applications

Monthly payment requisitions will be based on work "put-in-place" and will be verified on a trade-by-trade basis. Our primary review will be to ascertain that the work has been completed, and that nonconforming work, if any, has been corrected; that relevant financial, legal and administrative procedures are complied with, together with other necessary documentation.

## Safety

Our experience has shown us that a true commitment to safety is essential to the success of all projects. Swinerton's Corporate Safety Officer will review and audit the safety plan of each of the contractors and make appropriate recommendations on a regular basis. Each member of the contracting team will be required to have a company safety program that is implemented in the field. Swinerton was awarded the 'Star' status by OSHA as the First Voluntary Protection Program (VPP) participant allowing it to self-monitor its projects for safety. Swinerton is acutely aware of the Michelle Montoya Act and will ensure the contractor's work area is completely separated from all student activities. Contractor personnel will be finger-printed and given security badges for identification in case they need to interact with District staff. Keeping students, staff, faculty and parents safe will be paramount. Awareness of school activities will help us achieve a safety environment for all.

COVID-19 has presented significant and unique challenges to our projects in construction. Enhanced safety protocols, daily monitoring or regulatory changes and team discipline are keys to successfully ensuring health and safety on an active construction site. Swinerton has regular national and regional calls to update teams on successful protocols, giving our teams the tools they need to protect the health and safety of everyone, on every site. We will ensure that the construction activities recognize the "pulse" of a typical school day.

# 3 PROJECT/COST MANAGEMENT

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## Procurement

Our experience on both the Owner's and Contractor's side of the procurement process is a great advantage. Our Team will work collaboratively with the District's Procurement Staff to follow and enhance programs already established by the District. Our Team of seasoned professionals are familiar with the Governmental Code Rules and Regulations. All Team members have experience on projects involving public education procurement process. The graph below illustrates a typical early procurement process. The advantage to early procurement is the potential for cost savings and the pre-purchase of long lead items.

## Cost Reduction Measures And Meeting Established Project Budgets

We have extensive experience with educational facilities, including budgeting and estimating K-12 projects for both new construction and modernizations. We will prepare project budgets and cash flows to include both preconstruction and construction activities and costs. The budgets will identify both construction costs and 'soft costs' (design fees, permit costs, etc.). The budget and cash flow projections will be continually updated. There are several tools and techniques that we employ to manage project budgets/estimates, and to avoid budget overruns. These tools and techniques include:

- Project Budgeting
- Budgeting for Contingencies
- Forecasting Market Conditions

**Project Budgeting.** With our substantive experience in managing and delivering educational projects, we have developed an extensive database of comparable project costs. Validating a project budget at the earliest possible opportunity establishes a firm foundation for project success. A poorly estimated project will never be successful.

**Budgeting For Contingencies.** Along with proper budgeting is a need to establish an appropriate contingency to account for unknown or unaccounted factors. For every unknown project element, funds should be budgeted until a point in time where sufficient investigation or discovery can be conducted to reveal a factual or existing condition.

**Forecasting Market Conditions.** Identifying trends early and forecasting accurately is critical to the development of project budgets. State indexes, such as the CCI, are not accurate indicators of market conditions.

**Managing Total Project Exposure.** Throughout the design and construction process, another key to avoiding budget/estimate overruns is to manage Total Cost Exposure. Whenever a potential issue arises during design or construction, our staff is trained to track the issue and to budget funds to address this issue until it is resolved. This ensures that current financial information along with forecasted costs are presented when key or critical decisions are required.

## Experience With Delivery Methods

Swinerton Management & Consultant is a leading expert in the development of alternative project delivery systems. Our Principal-In-Charge, Mr. Jeff Gee has been involved in managing contemporary design/build projects from the Owner's perspective for a combined 50-years plus; he brings this experience and expertise to support our teams in the delivery of design/build projects.

Swinerton currently has major public-sector projects utilizing different delivery methods: Design-Build, Lease-Lease Back, Construction Management of Multiple Prime Contractors, CM-at-Risk and Design-Bid-Build.

## Design-Build

Design-Build project delivery has emerged as an important and viable project delivery process. Several key factors drive our approach to the design-build process:

- Owner demand for a single source of design and construction responsibility
- Demand for faster delivery of construction
- Re-evaluation of the tasks traditionally performed by architect | engineering teams
- Increasing owner acceptance of nontraditional project delivery methods
- Shifting of risk

The most critical aspect of Design/Build to an owner is "single point of responsibility." That is, dealing with one service provider rather than a separate architect, contractor and possibly additional entities such as a landscape architect, HVAC engineer, interior designer, etc. An important goal of Swinerton's Design-Build management of this delivery method is to minimize Owner risk. We manage the process so that the contractor absorbs more risk. The Design-Build contractor is responsible to the owner for the entire package. Owners select the Design-Build process to reduce the work and financial exposure to their institutions. When AB1000 passed in September 2002, Mr. Gee was one of the principal authors' of the Design-Build Guidelines for California's Community Colleges. The San Mateo County Community College District was also included in the language of AB1000, and was the first community college district to pilot this delivery method in the State of California. Since then, SMCCD has successfully delivered various large projects utilizing Design/Build delivery method.

# 3 PROJECT/COST MANAGEMENT

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## **Construction Management Multiple Prime**

Construction Management Multiple Prime delivery method has demonstrated significant success, specifically in costs, schedule and quality. For example, the City of Berkeley hired Swinerton as its Construction Manager for the seismic upgrade and remodeling of the Martin Luther King, Jr. Civic Center. This project was delivered using over 20 multiple trade contractors and vendors under contract to the City of Berkeley. Swinerton was responsible for the preparation of bid packages, bid analysis and award recommendations, together with onsite scheduling, administration, supervision and general management.

This allowed us to bid all trades in conformance with the City's public contracting guidelines, but manage all construction for a fixed fee. This process also allowed the City to select the Construction Manager solely on a qualifications basis. In addition, we utilized the CM-multiple prime delivery method at Cupertino Unified School District.

## **Design-Bid-Build (Lump Sum, Low Bid)**

As the most common public-sector delivery method, Design-Bid-Build delivery presents a unique set of challenges. The traditional design-bid-build process has created an environment where the Owner's risk needs to be carefully managed. Key considerations include:

- Thorough management of construction document preparation
- Detailed constructability review at key document milestones
- Thorough bid documents, particularly regarding scope
- Careful bid evaluation, particularly qualification and exclusion analysis
- Appropriate construction budget and schedule contingencies
- Detailed change order review

## **Lease-Lease-Back**

Lease-Lease-Back is an approved project delivery process that has seen greater use in the K-12 environment. As the least prescriptive procurement process, Districts have found the use of lease-lease-back a very flexible process. While there is little statutory guidance on this manner of solicitation, our philosophy is that there must be transparency and integrity in the selection process of a lease-lease-back provider. Swinerton utilized lease-leaseback on our assignment at South San Francisco Unified School District for the design and construction of Phases 1 and 2 of Athletic Fields at the District's two high school campuses, and for the construction of 44 new modular classrooms that are to be constructed in the summer of 2013. In all cases, and regardless of delivery method, Swinerton recommends contractor prequalification.



# 3 PROJECT/COST MANAGEMENT

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## 3.1.1 Staffing Plan

Our staffing plan for the NMUSD program is a lean approach based on a strong and versatile core team.

Craig Scaringi, as Project Executive, will provide leadership, planning, client interface, and oversight throughout the duration of the Contract.

The NMUSD day to day contact will be Joe Commodore. Our approach is to provide a strong, lean Team that can respond to any and all of NMUSD's needs. We understand the scope of services to be the attendance at the kick-off meeting and all daily/weekly meetings as required, review of all submittals for compliance with the appropriate specifications or requirements, review and enforcement of maintenance of the construction schedule, the performance of Public Works Inspector duties as dictated through this Request for Proposal, maintaining daily logs of project activity, providing progress reports as required, ensuring that all applicable utility rules, codes and safety regulations are being complied with, ensure that all facilities or appurtenances are constructed in accordance with the applicable plans, specifications and state and local regulations. We further understand that conducting daily quantity measurements of work with the contractor will be required, we will assist in the review and evaluation of any change order work, notify contractors and the NMUSD of non-compliance with the contract plans and specifications in a timely manner, report and document any and all safety and compliance infractions and unsafe work procedures with the inspector providing suggestions for safer alternative procedures or construction methods where appropriate. We will assist in the preparation of the punch lists of incomplete, non-complying, and deficient work notices, assist in the coordination of engineering support, surveying, specialty inspections and fieldwork by utility companies, conduct and generate minutes for all field meetings, monitor test results and require the contractor to provide corrective measures in order to achieve compliance. We will also assist in the coordination of NMUSD and stakeholders throughout the project, schedule final inspection with the City and applicable agencies, prepare, distribute and inspect corrections to the final punch list for completion, recommend final acceptance, certify the acceptability of the project and provide the finished set of project workbooks to NMUSD.

## Hourly Rates

Our fees are all-inclusive of laptop computers, cell phones, travel within the greater Orange County area, vehicle expenses are included in our staffing hourly rates, office supplies, etc. Expenses that are not included in our hourly rates would be any costs of reproduction, courier, delivery costs and specialized software licenses/computer programs required by NMUSD. Reimbursable items, if any, would be invoiced at cost to NMUSD.

Project Executive	\$200 - \$220
Senior Project Manager	\$180 - \$198
Project Manager	\$150 - \$158
Asst. Project Manager	\$115 - \$125
Sr. Project Engineer	\$115 - \$125
Project Engineer	\$ 95 - \$105
Sr. Financial Controls Manager	\$150
Scheduler	\$125 - \$155
Sr. Scheduling	\$180 - \$205
Jr. Scheduler	\$ 95 - \$105



# 3 PROJECT/COST MANAGEMENT

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## 3.1.2 Schedule/Timeline

The schedule will be prepared with input from NMUSD and any key stakeholders - all their activities and time lines will be included as part of the master schedule. Special consideration will be given to ensure that the project schedule aligns with NMUSD's goals and time line. The schedule also includes resource information identifying the cost of activities and the labor requirements. The schedule includes detailed activities for all Project Team members, including:

- District Responsibilities and Requirements
- Architect's and Engineer's Time lines and Deliverables
- Agencies with Approval Authority
- Permit and Inspection Requirements
- Funding Requirements, if any
- Inclusive of Interior Finishes, IT and FF&E Items
- Contractor and Vendor Awards, Submittals and Construction Activities
- Approvals
- Resident Move and Occupancy

Critical elements of maintaining a Project Schedule include:

**MONTHLY STATUS UPDATES** - To maintain proper control of the schedule, it is necessary to status the project to an as-built condition at least once a month and more frequently if the situation warrants.

**ADJUSTING THROUGH PROBLEM RECOGNITION AND LOGIC ENHANCEMENTS** - The team must be able to recognize impacts, track the logic back to the source of the issue and to make the proper logic and duration adjustments. Adjustments may require acceleration and addition of more detail to work around the problem or issue.

### COVID-19

Understanding the uncertainty surrounding all calendars considering the COVID-19 pandemic, Swinerton Management & Consulting will work with NMUSD to optimize the Program Schedule, to whatever degree possible, as dates become available and are formalized. We will work to adjust design, preconstruction and DSA submittal durations, in addition to construction durations, in order to take advantage of the summer months and the winter and spring breaks for both maximum construction activities and move management activities.

As a member of the Swinerton Family of Companies, Swinerton's Safety Department has developed a "Best-in-Class" COVID-19 safety protocol for job sites and work places. Swinerton has made it available to the public and it can be found at:

<https://swinerton.com/swinerton-covid-19-plan>

It is constantly being updated as new CDC guidelines are published.

# 3 PROJECT/COST MANAGEMENT

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## 3.2 COMPUTER PROJECT MANAGEMENT/SCHEDULING & ELECTRONIC DESIGN

### **Work with District Staff in the Development and Maintenance of Reporting Systems**

Our Project Team will work very closely with the District to fully implement the ColbiDocs project/construction management system to manage and report on the status of the bond projects.

Successful financial management of the bond and of individual projects is predicated upon our collective ability to manage budgets, track encumbrances and expended-to-date amounts, and unencumbered balances. As experienced Program and Project Managers who are experienced with financial management of bond programs, our Team takes great pride in “unqualified audit” results, and working closely with staff to ensure timely and efficient annual fiscal-year end close.

The data and information that is developed over the course of the bond programs belongs to the District. The District needs to be able to access all of this information during the future life of the school campus/building or project. Due to our familiarity with a number of systems, we are able to share with the District lessons learned, best practices, costs, advantages and disadvantages of a number of systems. However, the final determination is the District's.

### **Construction Management Software Systems**

Maintenance of Daily Records and Reporting - The ColbiDocs system will allow users to filter and sort through document management processes including:

- Contractor, A&E and Other Consultant Billings
- Permit Tracking (DSA approvals)
- Bid Distribution and Management
- Meeting Minutes
- Punch Lists

Critical documents and information can be developed both online and offline and then stored within a networked server (coordinated closely with District IT staff). This allows program team participants to retrieve information from these critical documents within seconds. Common published documents include:

- Plans and Specifications
- Project Budgets
- Project Schedules
- Bid Documents
- RFI and Submittal Logs
- Daily Reports
- E-mail correspondence
- Program / Project Team Directories

Utilizing an Online Project Management System has greatly expedited communication and reduced paperwork on Swinerton managed bond programs for other Districts. Instead of massive rolls of drawings being shipped from the designers one day, printed en masse the next day, and shipped overnight for delivery the following day, all project participants (down to the sub-subcontractors and suppliers) can use the Internet to view the entire set of plans and specifications the same day that they are “published” electronically.

### **RFI'S and Submittals**

Both Submittals and RFI's must be managed effectively from job inception through completion, as they can affect both the schedule and costs. We will establish procedures for the management of both submittals and RFI's. We will work with contractors and establish a submittal schedule that is coordinated with the construction schedule that allows for advanced procurement, fabrication and delivery of materials. We will also monitor the status of both the contractors' submissions and the design team's review of submittals to ensure that information and approvals are processed in a timely manner. RFI's will be submitted directly by the contractor when issues arise. A notification will be sent electronically notifying the Team an RFI is in the system. The architect can retrieve the RFI and respond immediately to the Team to avoid potential costly delays.

Software Programs and Management Tools - Technology plays a critical role in Project and Construction Management. Swinerton has a dedicated IT Department that is able to provide workstation and network support to our Team and West Contra Costa Unified District. Services available from Swinerton IT include:

- Application Hosting
- Workstation Configuration
- Office Set-Up
- Negotiation of Software Licenses
- Networking and a range of other support services
- Website Development

### 3 PROJECT/COST MANAGEMENT

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We also have extensive experience using comprehensive project management and cost accounting software packages that help us save time, avoid delays and keep projects on track. Our knowledge of many systems will allow us to tailor ColbiDocs to the District's specific needs.

#### **Ability To Meet Construction Schedules**

The Master Program Schedule is one of the most critical elements in the planning process. To ensure accuracy, Swinerton utilizes the Primavera Critical Path Method (CPM) program in preparation and maintenance of the overall master program schedule. Scheduling the planning, design and construction process is a vital tool in both the daily management and reporting of each project's progress. Recognizing this importance, Swinerton will act as the "Team Leader" in the preparation and maintenance of the project schedule.

Each schedule is prepared with input from the District, Architects and all Team Members. Special consideration will be given to ensure that the school calendar is incorporated into the overall schedules, and that the work is phased to minimize any impact on teaching and the school environment. The schedule also includes resource information identifying the cost of activities and the labor requirements. The schedule includes detailed activities for all Program Team members, including:

- District Responsibilities and Requirements
- Architect's and Engineer's Timeliness and Deliverables
- Agencies with Approval Authority
- DSA Permit and Inspection Requirements
- Funding Requirements
- Contractor and Vendor Awards, Submittals and Construction Activities
- Board Approvals

Critical elements of maintaining a Program Schedule include:

**Potential Delays - Monthly Status Updates.** To maintain proper control of the schedule, it is necessary to status each project to an as-built condition at least once a month and more frequently if the situation warrants.

**Adjusting Through Problem Recognition And Logic Enhancements.** The team must be able to recognize impacts, track the logic back to the source of the issue and to make the proper logic and duration adjustments. Adjustments may require acceleration and addition of more detail to work around the problem or issue.

Section **4**

# Sub Consultants



## 4 SUB-CONSULTANTS

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### 4.1 SUB-CONSULTANTS

Swinerton Management & Consulting does not propose the use of any sub-consultants for this contract. All work will be performed by Swinerton staff.



Section **5**

# References





## 5 REFERENCES

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Agency	Long Beach Unified School District (LBUSD)		
Contact Name/Title	Tari Fowler, District Project Manager		
Phone Number	562-997-8000 x1330	Email Address	tfowler1@lbschools.net

Agency	San Mateo County Community College District (SMCCD)		
Contact Name/Title	Jose Nunez, Vice Chancellor		
Phone Number	650-574-6512	Email Address	jnunez@smccd.edu

Agency	Solano Community College District (SCCD)		
Contact Name/Title	Mr. Lucky Lofton, Executive Bond Manager		
Phone Number	707-863-7855	Email Address	lucky.lofton@solano.edu

Agency	West Contra Costa Unified School District (WCCUSD)		
Contact Name/Title	Mr. Luis Freese, Associate Superintendent Maintenance, Nutrition & Operations		
Phone Number	510-307-4545	Email Address	lfreese@wccusd.net

Agency	San Francisco Unified School District (SFUSD)		
Contact Name/Title	Maureen Shelton, Director of Construction		
Phone Number	415-241-6152 x1527	Email Address	sheltonm@sfusd.edu

Agency	Chabot-Las Positas Community College District		
Contact Name/Title	Mr. Owen Letcher, Vice Chancellor of Facilities and Bond Program		
Phone Number	925-485-5277	Email Address	oletcher@clpccd.org

Section **6**

# Legal Issues



## 6 LEGAL ISSUES

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A good understanding of the construction process is a prime ingredient for success in litigation avoidance, requiring the participation of all project/construction members throughout the life of the project. As a program/construction management firm focused on Owner advocacy and unparalleled experience as a general contractor, we are best able to provide a comprehensive perspective to this process. Litigation/Claims Management starts early in the life of a project. Our Project Managers are actively involved in the pre-construction phase to help ensure that complete and accurate documents are issued for bidding purposes. We review proposed design changes and seek alternates, if possible, to eliminate and/or mitigate any extra costs. In addition, we maintain and record in detail daily project operations, particularly with regard to the schedule, manpower productivity, deliveries and delays. Rather than delaying settlement discussions to the end of the project, we pursue a fair resolution in a timely fashion during the course of construction when these claims are more manageable. Our project managers have experience in proactively avoiding litigation.

### 6.1 PENDING LEGAL ACTION

#### **USS Cal vs. South San Francisco Unified School District**

From 2011 through August 2014, Swinerton Management & Consulting (SMC) provided Program and Construction Management Services to South San Francisco Unified School District. During this period, turnover of District staff included two superintendents, three CBO's and two District bond directors. Due to changes in district staff and re-visioning of implementation of the bond program, SMC's services were revised to provide limited program management services, FF&E coordination and move management. Construction management services were provided by IRS 1099 Independent Contractors hired directly by the District.

Construction of modernization and new construction was completed at the District in approximately 2016. The contractual relationship between the General Contractor and the District devolved into litigation with the General Contractor filing litigation for payments owed, and the District filing a countersuit for defective workmanship. In early 2020, the Court affirmed a Summary Judgement in favor of the District citing that the contracts for construction were never ratified by the Board of Trustees, even though the contracts were signed by the Superintendent and approved for the District by the Director of the Bond Program. Upon filing of the Summary Judgement in favor of the District, the General Contractor asked the Court to amend its initial complaint that was previously filed in 2017 to include a number of Foes, including SMC.

### 6.2 SETTLEMENTS/JUDGEMENTS

#### **County of Solano New Design/Build Lab/Clinic, Fairfield, CA**

Swinerton Management & Consulting (Swinerton) provided project and construction management services to the County of Solano on a new, design/build, Lab/Clinic Project in Fairfield, CA. At the inception of the project, the construction duration was anticipated to be 11-months. At the time of award of the design/build contract, the approved construction duration was 15 months. Construction was initiated in 2008.

The longer construction duration was noted by all parties. However, at the request of the County, Swinerton deferred an additional services request until later in the construction duration. At month 10 of construction, Swinerton submitted an additional services request for the extended construction duration. The County's initial response was received in month 13 of construction, and then subsequently denied in month 16 - after construction was substantially complete. All other parties, Design/Build Contractor, architect, and other consultants were compensated for the extended duration. In 2013, and absent any alternative dispute clause in our agreement, Swinerton initiated litigation to seek compensation for additional services.

The Court found in favor of Solano County (2016), and indicated that Swinerton "should have walked off the job, absent a timely response or any response from the County." For the court to stipulate that we should have walked off the job is antithetical to our values and culture. Our core values are shaped around client advocacy, and service.

#### **College of Marin, Fine Arts Building and Performing Arts Building, Marin, CA**

Swinerton Management and Consulting (Swinerton) provided Program and Construction Management services to the Marin Community College District (MCCD) from 2006 thru 2012. In 2012, MCCD filed a demand for mediation against the architectural firm of Marcy Wong Donn Logan (MWDL) for alleged defects in the design of the Fine Arts (FA) Building, and the design of renovations to the Performing Arts Building (PA). MWDL then cross-complained against several parties, including Swinerton.

Swinerton successfully was granted a demurrer from the Court on the FA cross-complaint without leave to amend (2017). A similar demurrer is pending on the PA project. It should be noted that MCCD (Client) did not, and has not, initiated any legal action involving Swinerton.

## 6 LEGAL ISSUES

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### **6.3 AWARDS/ADMINISTRATIVE ACTION**

Neither Swinerton, nor any employee of Swinerton, is a party to an existing dispute with an owner, owner's consultants or contractors, related to any project for which Swinerton provided construction management services.

Section **7**

# Forms





## 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**

**Vice President/General Manager**

**Title**

**200 North Main Street**

**Address**

**(650) 483-7412**

**Telephone**

**February 19, 2021**

**Date**

**Jeffrey S. Gee, AIA**

**Typed or Printed Name**

**Swinerton Management & Consulting**

**Company**

**Santa Ana, CA 92701**

**Address**

**Fax**

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





## ATTACHMENT C

### **STATEMENT OF EXPERIENCE AND FINANCIAL CONDITION**

Company Name: Swinerton Management & Consulting

(Check One):        X Corporation        \_\_\_\_\_ Partnership        \_\_\_\_\_ Sole Proprietorship

Address:                200 North Main Street  
                              Santa Ana, CA 92701

Telephone/FAX#:     (949) 622-7000

Date and State of Formation/Incorporation: 1888 California/1908 California

Is the company authorized to do business in California?     Yes

Basis of Authorization:     X California Corporation     \_\_\_\_\_ California Business License  
                                      \_\_\_\_\_ California Engineering License     \_\_\_\_\_ Other (specify)

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

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### **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>\$13,714,716*</u>	<u>\$12,411,975*</u>	<u>\$13,074,890*</u>
Total:	<u>\$14,113,251*</u>	<u>\$12,704,476*</u>	<u>\$13,467,344*</u>

\* Swinerton Management & Consulting (SMC) revenue only

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

Santa Clara Family Justice Center

Completed: July 2016

Construction Cost: \$195 million  
Architect: ZGF Architects  
General Contractor: Hensel Phelps Construction  
Client: Administrative Office of the Courts

## 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:**

Jeffrey S. Gee, AIA

**TITLE:**

Vice President/General Manager

# ATTACHMENT D

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Swinerton performs all construction management (not-at-risk) services under the name of Swinerton Management & Consulting (Formal Legal Name: Swinerton Builders DBA Swinerton Management & Consulting). Swinerton Builders is a wholly-owned subsidiary of Swinerton Incorporated. Swinerton Incorporated is a 100% employee-owned California Corporation. Swinerton was originally founded in 1888 and incorporated in California in 1908.



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Signature

Jeffrey S. Gee, AIA

---

Name

February 19, 2021

---

Date

## ATTACHMENT E

### **PROJECT REFERENCE FORM**

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

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

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

# PROJECT REFERENCES

<b>Client</b>	Long Beach Unified School District (LBUSD)		
<b>Contact Person</b>	Tari Fowler, District Project Manager		
<b>Phone Number</b>	562-997-8000 x1330	<b>Address</b>	1515 Hughes Way Long Beach, CA 90810
<b>Email Address</b>	tfowler1@lbschools.net		
<b>Project Title/Location</b>	<b>LBUSD Millikan High School/Long Beach, CA</b>		
<b>Project Description</b>	Swinerton provided lease-leaseback preconstruction and construction services for a new three-story, 56,000-square-foot classroom building along with a new artificial turf soccer/softball field and student drop-off area.		
<b>Firm Responsibility</b>	Lease-Lease Back Contractor		
<b>Contract Bid Total of All Prime Contracts</b>	\$31,715,211	<b>Start of Construction Date</b>	December 2019
<b>Final Contract Total of All Prime Contracts</b>	Including change orders: \$25,062,000 (under budget)	<b>Building Occupancy Date</b>	December 2020
<b>Type of Contract</b>	Lease-Lease Back	<b>Status</b>	Complete

<b>Client</b>	San Mateo County Community College District (SMCCD)		
<b>Contact Person</b>	Jose Nunez, Vice Chancellor		
<b>Phone Number</b>	650-574-6512	<b>Address</b>	3401 CSM Drive San Mateo, CA 94402
<b>Email Address</b>	tfowler1@lbschools.net		
<b>Project Title/Location</b>	<b>SMCCD - Program and Construction Management for Capital Improvement Program (CIP 3)/San Mateo, CA</b>		
<b>Project Description</b>	Swinerton has provided Program Management and Construction Management services on over 200 projects for this \$896M program that serves three colleges: Canada College, College of San Mateo, and Skyline College.		
<b>Firm's Responsibility</b>	Program Management and Construction Management Services	<b>Total Value of Bid Allowances</b>	Various- Over 200 Projects
<b>Contract Bid Total of All Prime Contracts</b>	\$1.3 Billion - Over 200 Projects	<b>Start of Construction Date</b>	September 2002
<b>Final Contract Total of All Prime Contracts</b>	\$1.3 Billion - Over 200 Projects	<b>Building Occupancy Date</b>	Various - Program Completion 2022
<b>Type of Contract</b>	Project Management and Construction Management	<b>Status</b>	Ongoing

# PROJECT REFERENCES

<b>Client</b>	Solano Community College District (SCCD)		
<b>Contact Person</b>	Mr. Lucky Lofton, Executive Bond Manager		
<b>Phone Number</b>	707-863-7855	<b>Address</b>	2001 North Village Parkway Vacaville, CA 95688
<b>Email Address</b>	lucky.lofton@solano.edu		
<b>Project Title/Location</b>	<b>SCCD Project and Construction Management services for the Learning Resource Center/Fairfield, CA</b>		
<b>Project Description</b>	New Learning Resource Center (LRC) on the Fairfield Campus. The LRC is the single largest project for SCCD.		
<b>Firm's Responsibility</b>	Project Management, Design Management, Construction Management Services	<b>Total Value of Bid Allowances</b>	None
<b>Contract Bid Total of All Prime Contracts</b>	\$30.2 Million	<b>Start of Construction Date</b>	July 1, 2019
<b>Final Contract Total of All Prime Contracts</b>	In-progress	<b>Building Occupancy Date</b>	June 2021
<b>Type of Contract</b>	Construction Management	<b>Status</b>	Construction

<b>Client</b>	West Contra Costa Unified School District (WCCUSD)		
<b>Contact Person</b>	Mr. Luis Freese, Associate Superintendent Maintenance, Nutrition & Operations		
<b>Phone Number</b>	510-307-4545	<b>Address</b>	1108 Bissell Ave Richmond, CA 94801
<b>Email Address</b>	lfreese@wccusd.net		
<b>Project Title/Location</b>	<b>West Contra Costa Unified School District, Various Projects/Richmond, CA</b>		
<b>Project Description</b>	Swinerton Management & Consulting is providing Project and Construction Management Services		
<b>Firm's Responsibility</b>	Project Management, Construction Management, Bond Support Management Services, FF&E Procurement	<b>Total Value of Bid Allowances</b>	Michelle Obama Elementary School \$0
<b>Contract Bid Total of All Prime Contracts</b>	\$65 Million	<b>Start of Construction Date</b>	NTP for construction August 1, 2019
<b>Final Contract Total of All Prime Contracts</b>	\$65 Million	<b>Building Occupancy Date</b>	2021
<b>Type of Contract</b>	Construction Management	<b>Status</b>	Close out

WCCUSD - Michelle Obama Elementary School  
 Technical Analysis, Design and Implementation \$145,000  
 Project Management and Monitoring \$435,000  
 Training, Education Programs, Maintenance \$72,500  
 Budgeting \$72,500



# PROJECT REFERENCES

<b>Client</b>	San Francisco Unified School District (SFUSD)		
<b>Contact Person</b>	Maureen Shelton, Director of Construction		
<b>Phone Number</b>	415-241-6152 x1527	<b>Address</b>	555 Franklin Street San Francisco, CA 94102
<b>Email Address</b>	sheltonm@sfusd.edu		
<b>Project Title/Location</b>	<b>SFUSD District-wide PM/CM Services, Current Project: New Mission Bay School/San Francisco, CA</b>		
<b>Project Description</b>	Swinerton Management & Consulting has been selected three times by the San Francisco Unified School District to provide comprehensive project and construction management services on their 2006 (\$450 Million), their 2011 (\$561 Million) and their 2016 (\$758 Million) Bond Programs. Scope of services include design management, preconstruction services and managing the construction process on multiple projects.		
<b>Firm's Responsibility</b>	Project Management/Construction Management Services	<b>Total Value of Bid Allowances</b>	TBD Project will be using Design Build Bridging
<b>Contract Bid Total of All Prime Contracts</b>	\$1.769 Billion	<b>Start of Construction Date</b>	New Mission Bay School: TBD
<b>Final Contract Total of All Prime Contracts</b>	\$1.769 Billion	<b>Building Occupancy Date</b>	Various - Program Completion: 2022
<b>Type of Contract</b>	Project Management, Construction Management	<b>Status</b>	Bridging Document

<b>Client</b>	Chabot-Las Positas Community College District		
<b>Contact Person</b>	Mr. Owen Letcher, Vice Chancellor of Facilities and Bond Program		
<b>Phone Number</b>	925-485-5277	<b>Address</b>	7600 Dublin Blvd 3rd Floor Dublin, CA 94568
<b>Email Address</b>	oletcher@clpccd.org		
<b>Project Title/Location</b>	<b>PM/CM Services/Chabot College/Hayward, CA</b>		
<b>Project Description</b>	Swinerton Management & Consulting was selected to provide comprehensive project and construction management services for over 58 projects at the Chabot College Campus.		
<b>Firm's Responsibility</b>	Project Management/Construction Management Services	<b>Total Value of Bid Allowances</b>	None
<b>Contract Bid Total of All Prime Contracts</b>	\$520 Million	<b>Start of Construction Date</b>	2006
<b>Final Contract Total of All Prime Contracts</b>	\$520 Million	<b>Building Occupancy Date</b>	Various 2006-2023
<b>Type of Contract</b>	Project Management, Construction Management	<b>Status</b>	In-progress

**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

Jeffrey S. Gee, AIA

Title

Vice President/General Manager

Date

February 19, 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 # 119-21 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 NMUSD 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: Jeffrey S. Gee, AIA

Duly Authorized Signature: 

Title: Vice President/General Manager

Date of this Proposal/Offer: February 19, 2021

Offeror Name: Swinerton Management & Consulting

Offeror Address: 200 North Main Street

Santa Ana, CA 92701

Offeror Telephone: (650) 483-7412

Offeror Email: jgee@swinerton.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 Vice President/General Manager **[PRINT YOUR TITLE]**

of Swinerton Management & Consulting **[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 19, 2021

Proper Name of Submitter: Jeffrey S. Gee, AIA

City, State: Santa Ana, CA

Signature: 

Print Name: Jeffrey S. Gee

Title: Vice President/General Manager

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# HOURLY FEE SCHEDULE

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Our fees are all-inclusive of laptop computers, cell phones, travel within the greater Orange County area, vehicle expenses are included in our staffing hourly rates, office supplies, etc. Expenses that are not included in our hourly rates would be any costs of reproduction, courier, delivery costs and specialized software licenses/computer programs required by NMUSD. Reimbursable items, if any, would be invoiced at cost to NMUSD.

Project Executive	\$200 - \$220
Senior Project Manager	\$180 - \$198
Project Manager	\$150 - \$158
Asst. Project Manager	\$115 - \$125
Sr. Project Engineer	\$115 - \$125
Project Engineer	\$ 95 - \$105
Sr. Financial Controls Manager	\$150
Scheduler	\$125 - \$155
Sr. Scheduling	\$180 - \$205
Jr. Scheduler	\$ 95 - \$105



**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:** Swinerton Management & Consulting

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	200 North Main Street Orange County Santa Ana, CA 92701	5
2. Past Performance	Write in:	Max. Pts.
a. Identify the Firm's number of years' experience in providing services for K-12	90 years	5
b. Project listing - Identify the number of K-12 projects the Firm has worked on within last 3 years	20	5
c. Industry experience - Circle the type of projects the Project Team has worked on within the last 3 years (circle all that apply)	<input checked="" type="checkbox"/> K-12 <input checked="" type="checkbox"/> Community College <input checked="" type="checkbox"/> Charter/Private School <input checked="" type="checkbox"/> Non-school District <input checked="" type="checkbox"/> Other Project Types	5
d. Identify the Firm's number of employees	4,500 for all of Swinerton	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	Jeff to answer??????????????????	5
b. Identify the number of settlements or judgments involving such actions within the last five (5) years	Jeff to answer??????????????????	5
4. Record of Past Performance	Write in:	Max. Pts.
a. Identify the number of client references from a K-12 school district included in the Response (0-3)	3	5

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

Jeffrey S. Gee, AIA

Printed Name



Signature

February 19, 2021

Date



Jeffrey S. Gee, AIA  
Vice President / General Manager  
650.483.7412  
jgee@swinerton.com  
[www.swinertonmc.com](http://www.swinertonmc.com)

