

**AGREEMENT OF THE PARTICIPATING SCHOOL DISTRICTS IN SONOMA  
COUNTY REGARDING INTERDISTRICT ATTENDANCE AGREEMENTS**

(Education Code Sections 46600 et seq.)

This Agreement is made and entered into by and between the undersigned school districts and shall be effective July 1, 2020. The parties agree as follows:

1. Education Code 46600(a) provides that "[t]he governing boards of two or more school districts may enter into an agreement for a term not to exceed five school years, for the interdistrict attendance of pupils who are residents of the districts."
2. Education Code 46600(a) further provides that "[t]he agreement shall stipulate the terms and conditions under which interdistrict attendance shall be permitted or denied."
3. The undersigned school districts seek to serve the students in their districts in an efficient and collaborative manner.
4. Pursuant to Education Code section 46600, the parties agree that the respective policies of the district of residence and district of attendance shall control approval, denial, and revocation of interdistrict attendance permits. The parties acknowledge that these board policies and administrative regulations may be amended during the duration of this Agreement.
5. Each of the undersigned school districts shall continue to exercise its full authority to accept and reject interdistrict transfer applications as permitted by law.
6. This Agreement shall govern all existing interdistrict transfer permits and any applications for interdistrict transfer permits submitted for the 2020-21 school year and thereafter.
7. This Agreement shall continue for a five-year term. Each year, the parties will review this Agreement for purposes of extending the term for an additional year.
8. In the event a school district has converted some of its school program to a charter school, this Agreement shall not apply to the charter school grade level(s). Such a school district must specify in their records whether a student is enrolling in the charter school program or the regular school program, and must secure interdistrict attendance permits for students enrolling in the regular school program.
9. Any of the undersigned school districts may terminate its obligations under this Agreement upon giving ninety (90) days prior written notice to the other parties to this Agreement.
10. This Agreement shall supersede all prior interdistrict attendance agreements between the parties.

Sonoma County School Districts  
Interdistrict Attendance  
Agreement 2020-21 to 2024-25

<b><u>District</u></b>	<b><u>Board President</u></b>	<b><u>Signature</u></b>	<b><u>Date of Governing Board Approval</u></b>
Alexander Valley Union	_____	_____	_____
Bellevue Union	_____	_____	_____
Bennett Valley	_____	_____	_____
Union Cinnabar	_____	_____	_____
Cloverdale Unified	_____	_____	_____
Cotati-Rohnert Park Unified	_____	_____	_____
Dunham	_____	_____	_____
Forestville Union	_____	_____	_____
Fort Ross	_____	_____	_____
Geyserville Unified	_____	_____	_____
Gravenstein Union	_____	_____	_____
Guerneville	_____	_____	_____
Harmony Union	_____	_____	_____
Healdsburg Unified	_____	_____	_____
Horicon	_____	_____	_____
Kashia	_____	_____	_____
Kenwood	_____	_____	_____
Liberty	_____	_____	_____
Mark West Union	_____	_____	_____
Monte Rio Union	_____	_____	_____

Montgomery	_____	_____	_____
Oak Grove Union	_____	_____	_____
Old Adobe Union	_____	_____	_____
Petaluma City	_____	_____	_____
Petaluma Joint Union High	_____	_____	_____
Piner-Olivet Union	_____	_____	_____
Rincon Valley Union	_____	_____	_____
Roseland	_____	_____	_____
Santa Rosa City	_____	_____	_____
Santa Rosa City High	_____	_____	_____
Sebastopol Union	_____	_____	_____
Sonoma Valley Unified	_____	_____	_____
Twin Hills Union	_____	_____	_____
Two Rock Union	_____	_____	_____
Waugh	_____	_____	_____
West Side Union	_____	_____	_____
West Sonoma County Union High	_____	_____	_____
Wilmar Union	_____	_____	_____
Windsor Unified	_____	_____	_____
Wright	_____	_____	_____

Request for Proposals – Project Management Services

Gravenstein Union School District  
3840 Twig Ave., Sebastopol, CA 95472

March 9, 2020

**REQUEST FOR PROPOSALS  
FOR PROJECT MANAGEMENT SERVICES**

Pursuant to Government Code section 4529.10 et seq., the Gravenstein Union School District (District) invites proposals from qualified firms, partnerships, corporations, or individuals (collectively, “firms”) to provide project management services to the District for the project identified in this Request for Proposals (“RFP”) and any other projects the District deems necessary. Interested firms are invited to submit their proposals as described below, five (5) originals of requested materials to:

Attn: Superintendent David Rose  
Gravenstein Union School District  
3840 Twig Avenue, Sebastopol, CA 95472

A copy of the District’s Agreement for Project Management Services is attached hereto. Questions regarding this RFP may be directed to:

Wanda Holden  
GUSD Chief Business Officer  
3840 Twig Ave., Sebastopol, CA 95472  
707-823-7008 ext. 210  
wholden@grav.k12.ca.us

All proposals shall be sealed and delivered to the District, and must be received by the District on or before: **4:00 PM, March 27, 2020.**

This is not a formal request for bids or an offer by the District to contract with any party responding to this request. The District reserves the right to reject any and all proposals or any portions thereof.

Sincerely,

David Rose  
Superintendent  
Gravenstein Union School District



## **THE PROJECT**

Update the Gravenstein Facilities Master Plan, and manage the Hillcrest Roofing and Excessive Classroom Temperature Mitigation Project.

In summary, the Project Manager will be tasked to work with the School Facilities Committee and the Board of Trustees to generate a revised Gravenstein Facilities Master Plan and to manage the Hillcrest Roofing and Excessive Classroom Temperature Mitigation Project. The Gravenstein Facilities Master Plan is a District wide project with a time frame for completion of June 30, 2021. The Hillcrest Roofing and Excessive Classroom Temperature Mitigation Project will be located on the Hillcrest campus at 725 Bloomfield Rd., Sebastopol, CA 95472. The roofing and classroom temperature improvements have an estimated completion time of September 30, 2020.

The Project Manager must also follow the architect selection criteria defined in exhibit A, SB50 Program Professional Selection Process Schedule of Activities. *(This is an audit requirement for the Modernization Funding that the District is applying for.)*

A copy of the current Gravenstein Union School District Facilities Master Plan Summary is attached as exhibit B.

A copy of the Project Management Contract Template is attached as exhibit C.

**ANTICIPATED SCHEDULE**

Proposals Due: **March 27, 2020**

District Interviews: **April 8, 2020**

Anticipated Board Approval and Award: **April 9, 2020**

**SCOPE OF SERVICES**

The project management services will include but not necessarily be limited to the following numbered items and the services described in the attached Agreement for Project Management Services:

1. General:
  - a. Understand and represent District’s goals and objectives for the project;
  - b. Coordinate project activities with and assist District’s Project Inspector;
  - c. Coordinate project activities with District’s Architect and consultants;
  - d. Make recommendations, if appropriate, which may be incorporated into plans and specifications for project;
  
2. Bidding Phase:
  - a. Coordinate prequalification if applicable;
  - b. Participate in bid conferences and advise District, as needed;
  - c. Review bids, schedule, and materials breakdowns submitted by bidders;
  
3. Construction Phase:
  - a. Attend site meetings at least weekly and prepare complete and accurate meeting minutes for such meetings for distribution;
  - b. Attend monthly Board meetings and other District meetings as required;
  - c. Advise and assist District to develop economic, efficient, and desirable design, development and construction procedures;
  - d. Review and advise District concerning submittals, product samples, and specifications provided to Architect by contractor, subcontractors, and material suppliers for the project;
  - e. Analyze recommendations from Contractor, Architect, or other consultants which could improve the project or decrease construction time or costs;
  - f. Track all preliminary lien notices related to the project;
  - g. Track all necessary conditional and unconditional liens, and keep the District informed of the status of lien releases;
  - h. Review all change order requests issued by contractors and advise District about the form and content of such change orders in relation to the plans, specifications, and the contract documents;

Request for Proposals – Project Management Services

- i. Review and make recommendations on all payment requests pursuant to the contract documents, architect agreement, or other consultant agreements related to the project;
  - j. Identify possible payment defaults on part of contractors, subcontractors, material suppliers, or any party who may have lien rights against the project;
  - k. Perform periodic inspections of project at least once a week, or as often as necessary to verify:
    - 1) materials and labor being furnished are according to plans and specifications;
    - 2) work billed for each payment requested is completed in accordance with the plans and specifications;
    - 3) contractor time schedule is being maintained, as required by construction contract documents; and
    - 4) costs are within the District's budget;
  - l. Provide monthly accounting and Project Status Reports;
4. Close-Out Activities:
- a. Assist Architect in the preparation of punch lists for contractor, subcontractors, and other consultants on the project, coordinate and assist Architect in scheduling the completion of all such corrective work, and participate in all inspections;
  - b. Assist Architect in coordinating and assembling all warranties and guarantees as required by construction contract documents from the Contractor and submit to District.
  - c. Coordinate with Architect, DSA, OPSC, and Department of Education for final acceptance of Project;
  - d. Advise the District on project closeout and final hard and soft costs;
5. Additional Services:
- a. Develop, assemble, and submit documentation required to support the District's position in the resolution of Contractor's claims, if necessary;
  - b. Other activities as requested by District.

## INSTRUCTIONS FOR SUBMITTING PROPOSALS

1. Proposal Form Requirements: All notations must be typed or written in ink; proposals must not be written in pencil. Mistakes may be crossed out and correction inserted adjacent; but the correction should be initialed in ink by the person signing the proposal. No corrections can be made after the time for submitting the proposals.
2. Non-Discrimination: The Project Manager shall not discriminate against any employee or applicant for employment because of sex, race, creed, color, national origin, religion, age or non-job related handicap or disability. Failure to comply with these provisions shall be considered cause for not requesting proposals from the firm.
3. Disabled Veteran Business Enterprise (DVBE): The District has a participation goal for disabled veteran business enterprises (DVBE) of at least 3 percent of the overall design costs.
4. Conflict of Interest: Pursuant to Government Code section 4529.12, District employees are prohibited from participating in the selection process when they have a financial or business relationship with any private entity seeking to enter into a contract with the District, and the District requires compliance with all laws regarding political contributions, conflicts of interest or unlawful activities. Depending on the nature of work performed, the Project Manager may be prohibited from performing future work for the District if such work will result in a conflict of interest as prohibited under Government Code section 1090 et seq., and Government Code section 87100 et seq.
5. Proposal Requirements: All materials submitted to the District in response to this Request for Proposal will remain property of the District unless otherwise noted within this document. Each proposal should include the following information:
  - a. Name, address, contact numbers, e-mail, website (if applicable) and brief history of the firm.
  - b. Identify legal form, ownership, and senior officials of firm.
  - c. Identify proposed sub-consultants by name, address, and work to be performed.
  - d. List of applicable licenses including license numbers and expiration dates.
  - e. Organizational chart showing the proposed team and the key personnel to be assigned to this project.
  - f. Detailed resumes of personnel to be assigned to this project.

Request for Proposals – Project Management Services

- g. Describe process used by the firm to coordinate and check construction documents in order to minimize construction change orders.
- h. Describe the firm's approach to providing reliable, cost-effective project management services for public works projects.
- i. List projects completed by the firm within the past five (5) years, that are similar in scope and size to the project proposed in this RFP.
  - 1) Identify project name and location, size and date constructed.
  - 2) Include examples of cost estimating, if applicable, including bid results for the representative projects.
  - 3) Include a list of the total change orders for each of the representative projects.
  - 4) Include a list of references including contact names and telephone numbers for the representative projects.
- j. Proof of insurance.
- k. Detailed proposed fee schedule and estimate of costs to provide project management services for the project.

## EVALUATION AND SELECTION PROCESS

The District's selection committee will perform the selection process in three phases:

1. **Qualification Phase:** Receive and review proposals and selection of a "short list" of finalists.
2. **Interview Phase:** Interview the finalists, check backgrounds and select the preferred Project Manager for recommendation to the District Board of Trustees.
3. **Approval Phase:** Contract terms will be negotiated and submitted to the District Board for approval.

The District intends to select the firm that best meets the District's needs to perform the project administration services as described in this Request for Proposals. The following criteria will be used in evaluating and selecting the prospective firm:

1. Clarity of submittal and responsiveness to RFP.
2. Qualifications, education and relevant experience of the key team members.
3. Demonstration of experience in project management of comparable projects, including: project planning, coordination, scheduling, cost control, capabilities and techniques.
4. Quality of previous projects and record of budget and schedule performance.
5. The techniques and procedures used in other similar projects applicable to this project.
6. Comparison of billing rates and estimated cost to provide services for the project.
7. Any other criteria deemed relevant to the selection for this project.

**SB 50 Program  
Professional Selection Process  
Schedule of Activities**

The enactment of SB 50 in November 1998 included requirements regarding the selection of design professionals for projects for which districts will be seeking state funding.

Ed. Code Sec. 17070.50 provides that "The board shall not apportion funds to any school district, unless the applicant school district has certified to the board that the services of any architect, structural engineer or other design professional for any work under the project have been obtained pursuant to a competitive process that is consistent with the requirements of Chapter 10 (commencing with Section 4525) of Division 5 of Title I of the Government Code."

The SAB requires school districts to self certify compliance. On page 6 of the Application for Funding, form SAB 50-04, the following statement is included for certification by the school district: "All contracts entered on or after November 4, 1998 for the service of any architect structural engineer or other design professional for any work under the project have been obtained pursuant to a competitive process that is consistent with the requirements of Chapter 10 (commencing with Section 4525) of Division 5, of Title I, of the Government Code."

1. Identification of need by district (general scope of work developed).
2. Identification by district of interested and potential professional design firms to receive memo requesting letters and statements of qualification and/or placing advertisement in local paper (5 days) requesting qualification proposals (sample letter and ad attached).
3. Mail or fax criteria to all firms who respond to letter and/or advertisement (sample criteria attached).
4. Letters and statements of qualifications due (allow minimum of 10 days for firms to submit materials).
5. Designate committee members who will evaluate proposals and interview the selected firms (sample evaluation forms attached).
6. Letter mailed to selected firms advising date for interviews and pre-interview tour of sites (optional). Copy of questions that will be asked during the interview would be helpful to the selected firms (sample questions attached).
7. Letter mailed to firms that were not selected for an interview expressing appreciation for their interest (sample letter attached).
8. Schedule interview for selected firms. Allow at least 45 minutes for each interview. Have interviews on the same day, if possible (this allows the interviewing committee to compare all of the interviewed firms while information is fresh in their minds). The best firm for the project to be selected, based on qualifications.

9. Contract with selected firm negotiated and implemented.
10. Letter mailed to all firms interviewed, indicating results of interviews and expressing appreciation for their involvement (sample letter attached).
11. Post-selection requirements (public hearings, etc.).



**Item #2**  
**Sample Letter**  
**Request for Letters of Qualifications**  
**&**  
**Sample Advertisement**

District Letterhead

Date

Company Name  
Company Street Address  
City, State Zip code

RE: Request for Statements of Qualifications

Your firm is invited to submit your statements of qualifications to become eligible for a possible interview for architectural services related to design and construction requirements for the District Name. This project's description preliminary requirements are based on studies performed by the District Name.

Attached is the selection criteria for the District Name. Please respond in the same order/format as indicated on the Architect's Qualification Form.

For firms that are selected for an interview, a tour of the facility and site will be arranged (this sentence is optional). Your letters and statements of qualifications with \_\_\_\_ copies (enough copies for each committee member) should be forwarded to the following address, and should be received no later than 5 p.m. on day and date, and addressed to:

\_\_\_\_\_  
*Name* *Title*  
\_\_\_\_\_  
*Address*

Sincerely,

District Representative  
Title

**District Name**

**REQUEST FOR PROPOSAL FOR ARCHITECTURAL SERVICES**

**PROPOSALS DUE:**

The *District Name* is requesting proposals from qualified architectural firms which comply with all requirements set forth by the Office of Public School Construction (OPSC).

**Modernization of:**

**School Name  
School Street Address**

**School Name  
School Street Address**

**OPSC Application number not yet established**

**Interested firms will be required to provide:**

- History and background of new and modernization projects in public school construction.**
- History and background of working with the State (State Department of Education, OLA, DSA and others) on school projects.**
- Architect's Qualification Form**

**To obtain a copy of the Selection Criteria and Architect's Qualification Form, please contact:**

**District Representative, Title  
District Name  
District Mailing Address  
City, State Zip Code  
Phone Number**

**Item # 3**  
**Sample Criteria**

## **Selection Criteria**

Proposals submitted in response to this Request for Qualifications (RFQ) will be evaluated on the following criteria. Specific requirements are listed in the Architect's Qualification Form. Submittals are to be organized to respond in same order/format as the qualification form, 8-1/2" x 11" size. Including company brochures and promotional materials.

The successful firm will demonstrate, through its proposal, that it has carefully studied the District's expectations as stated in the RFQ. This proposal, presentation of completed projects and interview must show that the firm has the professional capability and personality to be a full service architect who will facilitate and oversee bidding, construction, close-out and occupancy of the project.

- ◆ Approach project architect will bring to project
- ◆ Individual strength of the design architectural team and consultants
- ◆ Experience in working with lay persons on Project Planning Committee
- ◆ Creative project problem solving
- ◆ Experience in data and communication systems used in schools
- ◆ Experience and knowledge of energy saving devices and strategies
- ◆ Firm's capability of submitting DSA approved plans and specifications on CD-ROM or Iomega Zip Disk for SB50 projects
- ◆ Project architect's experience in successful and timely approval of firm's projects through Division of the State Architect (access and structural sections) and State Fire Marshal
- ◆ Project architect's knowledge of applicable State regulations and California school construction/modernization practice
- ◆ Responsiveness to the RFQ - breadth and quality of response
- ◆ References from clients and contractors

**Architect's Qualification Form**  
**(Please respond in the same order/format listed below)**

**Date:**

1. THE ARCHITECT

1. Name of firm
2. Name of senior member
3. California registration number
4. Business address
5. Phone number
6. Type of firm:  
Individual \_\_\_\_\_ Partnership  
Corporation \_\_\_\_\_ Joint Venture
7. Date office established
8. Total number of school projects under the State School Building Program actually completed by this firm. Identify all Modernization projects completed.
9. Total number school projects in progress by this office at this time and approximate construction amount.
10. Total number of projects of all kinds in progress by this office at this time and approximate construction amount.

2. THE OFFICE

1. Number of employees currently in architect's office.
2. Maximum staff employed at any one time, date.
3. Of present employees how many are:  
Architects \_\_\_\_\_ Designers  
Draftsmen \_\_\_\_\_ Engineers  
Spec Writers \_\_\_\_\_ Clerical

3. ARCHITECT'S EXPERIENCE

1. Identify the following key Team Members and provide their qualifications:

Principal-in-Charge  
Project Manager/Project Architect  
Contract Administrator  
State Agency Advocate

Personnel identified for these positions are expected to be involved throughout the life of the project.

4. ENGINEERING ASSOCIATES

The Architect normally associates with the following firms:

1. Structural Engineer

- a. Name
- b. Structural registration number, date of registration
- c. Business address
- d. Total number of school jobs upon which the firm has been responsible for engineering services.
- e. Remarks (include years of previous experience with Architect)

2. Mechanical Engineer

- a. Name
- b. Structural registration number, date of registration
- c. Business address
- d. Total number of school jobs upon which the firm has been responsible for engineering services.
- e. Remarks (include years of previous experience with Architect)

3. Electrical Engineer

- a. Name
- b. Structural registration number, date of registration
- c. Business address
- d. Total number of school jobs upon which the firm has been responsible for engineering services.
- e. Remarks (include years of previous experience with Architect)

4. Civil Engineer

- a. Name
- b. Structural registration number, date of registration
- c. Business address
- d. Total number of school jobs upon which the firm has been responsible for engineering services.
- e. Remarks (include years of previous experience with Architect)

5. Provide name, address and phone number of proposed landscape architect, acoustical, food service and energy consultants.

5. ORGANIZATIONAL CHARTS

1. Provide an organizational chart showing the relationship and the flow of information between the District and your firm and consultants.
2. Methodology - Describe the approach you will take for this project.

6. FIRM RESOURCES

1. Design Capabilities
  - a. Briefly describe your design philosophy and process with emphasis on how this will suit our need.
  - b. Briefly describe how you integrate flexibility and future technology into



your design.

2. Technical Capabilities
  - a. CADD Capabilities
  - b. Cost Estimate History (show examples of cost estimate versus actual bid amount on five (5) recent projects, at least one of which must be from each group listed in Exhibit I).
  - c. Change Order History:
    1. Briefly describe your approach to problems and change orders.
    2. Track Record for five (5) projects listed in item F.2.b. Show the amount of change orders and indicate whether change orders were caused by the District, Architect or Contractor.
  - d. Briefly describe your experience in meeting schedules and time lines. Include for the five (5) projects listed in item F.2.b. the contract time at bid and the actual time from start of construction to owner occupancy.
  - e. Briefly describe quality control/assurance procedures.
  - f. Briefly describe your experience with State/Local Agencies and your knowledge of State School Building Program.
  - g. Briefly describe your Construction Administration Procedures.

7. FINANCIAL RESOURCES

1. Provide limits of professional liability (minimum \$1,000,000.00) for architect and engineering associates listed in items D.1 through D.4.
2. Provide limits of public liability and property damage insurance.

8. CLIENT SATISFACTION/REFERENCES

1. List at least four (4) education client references for whom your firm has performed similar project services. References must include:
  - a. School district name, address
  - b. contact name, phone number
  - c. Identify project(s) for referral
2. What school projects do you feel represent your best efforts to date and you would suggest visiting?

3. List three California licensed general or prime contractors who have used your firm's drawings and specifications on California public school projects; include the name, address, telephone number, and contact person who can attest to the clarity and accuracy of details, coordination of design, disciplines, and completeness of contract documents produced by your firm.

9. RELEVANT EXPERIENCE

1. Complete Exhibit I as prescribed.
2. Provide photographic representation of projects listed in Exhibit I (optional).

10. SIGNATURE

The information submitted as a summary of the architect's qualifications for work in the District Name.

Signature

Print Name

Title

RELEVANT EXPERIENCE  
EXHIBIT I

List the latest school projects, any level, in production, under construction or completed.

GROUP 1      \$100,000 - \$1,000,000

Completion Date	Project	Location	Cost	Job Status

GROUP 2      \$1,000,000 - \$3,000,000

Completion Date	Project	Location	Cost	Job Status

GROUP 3      \$3,000,000 - \$10,000,000

Completion Date	Project	Location	Cost	Job Status

GROUP 4      \$10,000,000 AND OVER

Completion Date	Project	Location	Cost	Job Status

**Item # 5**  
**Sample Qualifications Evaluation**  
**&**  
**Sample Qualification Evaluation Summary**

# Qualifications Evaluation

Owner \_\_\_\_\_ Contact Person \_\_\_\_\_

Project Description \_\_\_\_\_

Architectural Firm \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_

Zip \_\_\_\_\_ Telephone \_\_\_\_\_

Contact \_\_\_\_\_

	Rating	X	Weight	=	Total
1. Firm's history and resource capability to perform required services.	X			=	
2. Evaluation of assigned personnel.	X			=	
3. Related experience (as appropriate): <ul style="list-style-type: none"> <li>• Design Services</li> <li>• Demolition</li> <li>• Other</li> <li>• Construction Coordination</li> <li>• Studies</li> </ul>	X			=	
4. Budget, cost controls experience, and results.	X			=	
5. Familiarity with local area—Geography and facilities.	X			=	
6. Ability to relate to project requirements.	X			=	
7. Analysis of subjective statements (one page) applicable to the project as required on the RFQ.	X			=	
8. Reference check (evaluation transfer from reference check list).	X			=	
<b>GRAND TOTAL</b>					

Name of Reviewer \_\_\_\_\_

# Qualifications Evaluation Summary

*(To be used by the review group person in charge, to compile the evaluation results of all letters of qualifications submitted. Note: Enter the grand total for each firm's qualifications (from the respective evaluation sheets for comparative purposes) to select three to five most qualified firms to be interviewed).*

Firms	1	2	3	4	5	6	7	8	9	10
Reviewer 1										
Reviewer 2										
Reviewer 3										
Reviewer										
Reviewer										
Grand Total										

List the top-ranked firms as the short-list firms to be interviewed.

**Item # 6**  
**Sample Interview Questions**



# Interview Questions and Score Sheet

Date:

Firm: \_\_\_\_\_ Project:

Rating X Weight = Total

## PLANNING

- |   |   |  |   |
|---|---|--|---|
| 1. How do you reconcile requested improvements with the project budget? | X |  | = |
| 2. What methods do you use to project construction costs?               | X |  | = |
| 3. How do you obtain user input for planning purposes?                  | X |  | = |

## DESIGN

- |   |   |   |   |
|---|---|---|---|
| 4. Explain several typical modernization needs on a school campus.                                    |   |   |   |
|   | X |   | = |
| 5. How do you choose materials and equipment for a project?   | X |   | = |
| 6. What issues would be involved with a complete reconstruction of a portion of an existing building? |   | X | = |

## CONSTRUCTION ADMINISTRATION

- |  |   |   |   |
|--|---|---|---|
| 7. What Methods would you use to control project costs?                  |   |   |   |
|  | X |   | = |
| 8. What methods would you use to minimize change orders?                 | X |   | = |
| 9. How would you schedule a modernization project on an existing campus. |   | X | = |

## MISCELLANEOUS

- |  |   |   |   |
|--|---|---|---|
| 10. Do you know of any techniques to speed plan review by the Division of the State Architect? |   |   |   |
|  | X |   | = |
| 11. What does the funding submittal package include when submitted to OPSC?                    |   | X | = |
| 12. What limitations apply to the savings left after completion of a modernization project?    |   | X | = |

**GRAND TOTAL** =

*During the interview, rate each firm on a scale of 1-5 being the highest, in each of the eight categories. Enter the under "Rating." At the completion of the interview, multiply the rating by the predetermined weight for each category, and enter the total. Add all totals and establish the grand total. The person in charge will combine all of the totals for those participating in the interview session. The preassigned weights are established with a maximum of 10 points for each category. A maximum of 400 points may be awarded, assuming all categories were weighted at 10 and the firm received the maximum 5 rating on each category.*

**Item # 7**  
**Sample Letter**  
**Firms not selected for interview**

District Letterhead

Date

Company Name  
Company Street Address  
City, State Zip code

RE: Status of Selection Process for \_\_\_\_\_ (Project)

The \_\_\_\_\_ *District Name* \_\_\_\_\_ expresses its appreciation to you and your firm for submitting your letters of qualifications. After careful consideration of all firms that submitted qualification, the *District Name* \_\_\_\_\_ decided to interview the following firms:

List firms in alphabetical order:

- 1.
- 2.
- 3.

Although your firm was not selected for an interview, we appreciate your interest in our project and the resources spent on the preparation of your proposal.

Sincerely,

District representative  
Title

**Item # 10**  
**Sample Letter**  
**Firms that were interviewed**

District Letterhead

Date

Company Name  
Company Street Address  
City, State Zip code

RE: Status of Selection Process for \_\_\_\_\_ (Project)

The \_\_\_\_\_ *District Name* \_\_\_\_\_ has completed the selection process for professional services for the above named project. It has been our objective to select the most qualified firm to perform this service. The results of \_\_\_\_\_ *District Name's* \_\_\_\_\_ decision ranks the firms interviewed into the following order:

Firm #1.

Firm #2.

Firm #3.

We have now entered into contract discussions and negotiations with \_\_\_\_\_ Firm #1 \_\_\_\_\_. *The District Name* \_\_\_\_\_ express their appreciation for your time, effort, and interest on our behalf.

Sincerely,

District representative  
Title

# GRAVENSTEIN UNION SCHOOL DISTRICT FACILITY MASTER PLAN



**Gravenstein Elementary School**



**Hillcrest Middle School**

August 3<sup>rd</sup>, 2012

Prepared by:



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## **1: INTRODUCTION:**

Gravenstein Union School District has requested that a facility master plan be prepared to identify and prioritize facility improvements required to accommodate the growth, operations, and educational vision of the District in the future. Preparation of a Master Plan is good business practice to address aging facilities and remain viable, safe, productive, operationally efficient, and successful in meeting educational goals and objectives.

This Master Planning process has been developed with community involvement, school stakeholder participation, and the oversight of a steering committee. The plan addresses the following core objectives:

- Establishing an overall vision for the school facilities
- General assessment of the existing state of the campuses and identification of general recommended facility repairs
- Analysis and recommendations for energy efficiency improvements
- Assessment of current Accessibility and noted deficiencies
- Prioritization the projects
- Establishment of an initial estimated construction cost.

The focus of this proposal will be to develop a plan in partnership with the Board of School Directors, School Stakeholders, and the Community.



## ACKNOWLEDGEMENTS

### Participation:

#### GUSD Board of Trustees

Jim Horn, President  
Sandra Wickland  
Kay Crocker  
Jeff Weaver  
Jan Zlotnick

#### Superintendent

Linda LaMarre

#### Principals

David Fichera, Hillcrest Middle School  
Linda LaMarre, Gravenstein Elementary School

#### District Maintenance and Facilities Manager

Brian Sposato

#### Community Meeting Participants from June 26<sup>th</sup>, 2012

#### Design and Assessment Team

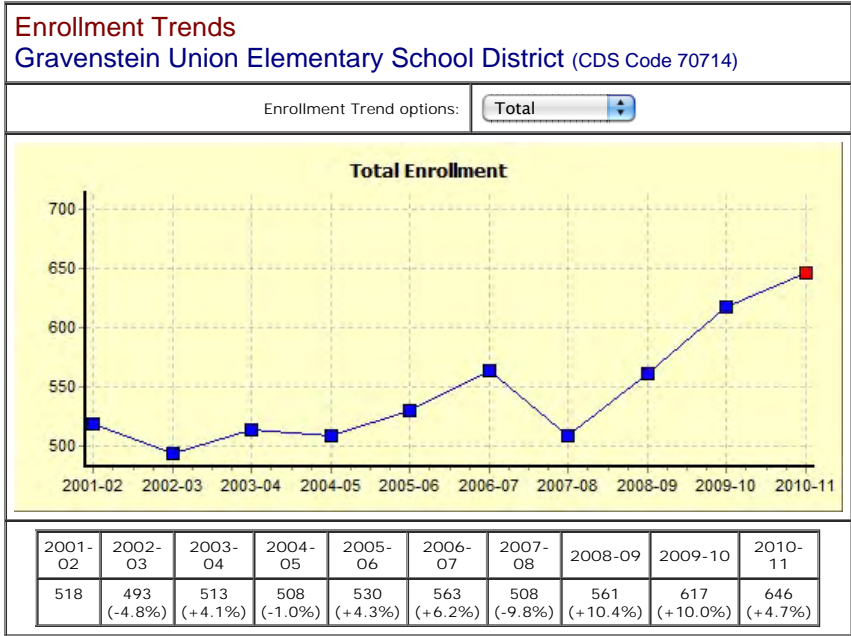
Doug Hilberman, Principal in Charge, AXIA Architects  
Robert Jacques, AXIA Architects  
Eddie VanSlambrouck, AXIA Architects  
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Terry Szalai, Suite 16 Electrical Engineers  
Jim Horn, Horn Mechanical Engineers  
Tom Terry, Roof Consultant  
Kevin Gilleran, Gilleran Energy Management  
David Lopez, Permit Services, LLC (ADA Assessment)  
Brian Sposato, Facilities Manager, GUSD

## 2: DISTRICT AND MASTER PLAN OVERVIEW:

Gravenstein Union School District is home to two small, award-winning public schools in the rolling hills near Sebastopol in the western portion of Sonoma County, California. The District provides resources from pre-kindergarten through 8<sup>th</sup> grade. Students from the Gravenstein Union School District feed into the West Sonoma County Union High School District after 8<sup>th</sup> grade.



The focus of the curriculum is on strong academic programs including creative arts and music instruction in a quiet rural setting. Both campuses and educational programs are recognized as California Distinguished Schools. The population of the schools has been increasing in recent years, attributable to the academic excellence.



Source: Ed-Data

The Gravenstein Elementary School campus serves approximately 350 children. The original campus was built in 1956. A large portion was modernized about 25 years ago and is at the end of its recognized life cycle for finish materials. One wing of classrooms was modernized in 2005.

The Hillcrest Middle School campus serves approximately 280 students. The original campus was built in 1966, with most portions modernized in 2007. The multi-use was added to the campus in 2000.

The School District recognizes that the campuses must be updated to meet current educational demands and to provide for the safety and wellbeing of its students. As part of the Master Planning preparation the team visited each campus and performed assessments of the existing conditions including building envelope, structural, electrical, mechanical, and general energy efficiency.

The Master Plan is intended as a state-of-the-District report, a blueprint for the future of the Gravenstein Union School District, and a working document that can be updated as the District implements portions of the plan and natural evolution and new needs occur.

### **3: PROCESS**

#### STEP 1: ESTABLISH GRAVENSTEIN UNION SCHOOL DISTRICT FACILITY MASTER PLAN STEERING COMMITTEE

AXIA Architects assisted the District with the organization of an oversight steering committee. The mission of the steering committee was to assess the data compiled, the recommendations, the formulated options, and provide direction to the design team. The result of the Steering Committee's efforts are summarized in a Report of Recommendations to the Board of School Directors. The Report has been prepared with the assistance of AXIA Architects.

#### STEP 2: STAKEHOLDER INPUT – COMMUNITY OUTREACH

The AXIA Architect team visited both the Gravenstein Elementary School and Hillcrest Middle School campuses. The school visits included the following activities:

- Observation of drop off/pick up circulation
- A meeting at each campus with representatives of the key school stakeholders and District personnel.
- A discussion to identify the needs, goals, constraints, and vision of each campus.

AXIA conducted one community meeting to solicit input from the community regarding school facilities at each of the campuses.

The visits and the community meeting enhanced the feedback to understand the needs of the facility as perceived by a variety of vantage points.

#### STEP 3: DATA COLLECTION - SCHOOL FACILITY REVIEW

The design and assessment team gathered data on the existing schools in preparation for analysis and Master Planning. The data gathering generally included the following key areas:

- Assessment of general structural condition
- Assessment of roof condition
- Assessment of main electrical equipment
- Assessment of Fire Alarm systems
- Consideration of potential IT and data upgrades
- Review campus for visible dry rot or building assembly failures.

- Assessment of existing food service equipment based on District lunch program
- Analysis of existing energy utilization
- Review of modernization needs
- Survey Information\*
- Accessibility Reports\*
- Assessment of mechanical units\*

\* Assessment information provided by District

The structural assessment of the existing facilities was performed based on an ASCE 31 Tier 1 review. The assessment included a review of the original construction drawings (when available), a site review of the buildings, and a general evaluation report. No special or invasive testing was performed

#### STEP 4: DATA COLLECTION – ENERGY EFFICIENCY REVIEW

Green Building features have been shown in cases to increase student attendance rates and productivity. Many of these features also have the capability to reduce the District operating costs for the facilities. The team assessed the existing campuses for opportunities to increase energy efficiency and create a healthier environment.

There are three opportunities to track possible energy and or green building upgrades or improvements to the schools. Each system has its benefits and during implementation the design team can work with the District and the District’s mechanical engineer to determine which system would best fit the District energy and green building goals.

- EPA’s benchmarking tools can certify the buildings under the Energy Star program for commercial buildings.
- Collaborative for High Performance Schools (CHPS) tools and processes can qualify any modernization under the CHPS Designed Program or the CHPS Verified Program. Additional funding may be available for modernizations under the CHPS High Performance Incentives (HPI) program.
- US Green Building Council’s LEED Program for Schools can certify the proposed project.

The design and assessment team reviewed the existing campuses and prior 24 months of utility bills to assess current conditions and opportunities for energy conservation. Observations included a review of the following:

- Light Fixtures – Replacement, relamping
- Lighting Controls – Day light dimming, occupancy sensors
- HVAC (through District’s Mechanical Engineer)– Mechanical Equipment Age and Efficiency, Economizers, Controls.
- Plug Load Controls
- Building Envelope Upgrades: Insulation, windows, clerestories, roof reflectance
- Energy Creation – Solar

A preliminary review of both campuses was completed for the potential addition of solar systems.

#### STEP 5: MASTER PLANNING

AXIA Architects worked with the District and key stakeholders to create a Master Plan for each of the campuses based on the data collected. The plan can be used by the District to prioritize, fund and initiate future modernization, remodeling and building addition projects on campus to meet present and anticipated educational and community goals.

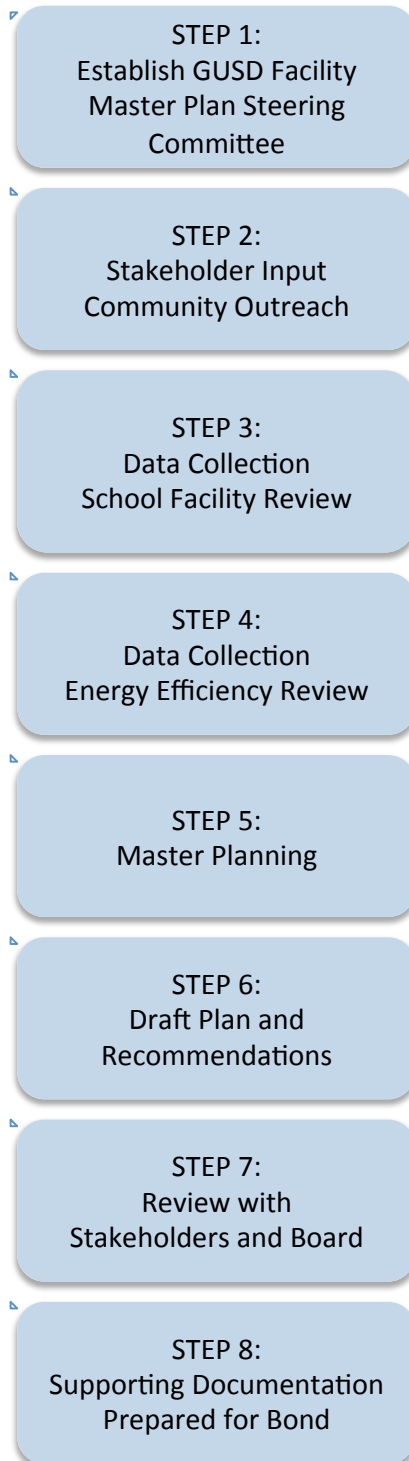
#### STEP 6: DRAFT PLAN AND RECOMMENDATIONS

At the completion of Steps 1-5, the Steering Committee and the AXIA team drafted an overall plan and formulated recommendations. The draft was presented at the July 11<sup>th</sup>, 2012 District Board of Trustees meeting. The plan identifies projects, approximates construction costs and the recommended order of implementation. In many cases, not all projects can be done at the same time and based on available resources a phasing criteria has been established.

#### STEP 7 & 8 : REVIEW WITH KEY STAKEHOLDERS AND BOARD, PREPARE DOCUMENTS

The Master Planning Process culminated with presentations to the Board of Trustees, the Site Committee, Key Stakeholders, and the community.

# Overview of Master Plan



#### **4: FACILITY ASSESMENTS**

This section of the Master Plan contains the following information for each campus:

1. SCHOOL OVERVIEW
2. GENERAL SUMMARY OF EXISTING CONDITIONS: This is a brief summary of the assessment notes made by the design team during the visual observation of the campus. A more thorough list of assessment notes can be found in the Appendix
3. RECOMMENDATIONS
4. MASTER PLAN OF SITE
5. CONCEPTUAL COST ESTIMATE

#### **ORGANIZATION OF THE RECOMMENDATIONS:**

The Master Plan includes a list of proposed improvements as well as related assessment reports from the Architect's and Owner's consultants. The identified improvements for the campuses are organized into three major categories as follows:

- A. *Mandatory Improvements:* These improvements are viewed as safety issues that are necessary for compliance with regulatory codes.
- B. *Necessary Improvements:* These improvements are required to preserve the campus and provide necessary classroom upgrades. Inaction for these improvements will likely affect the integrity of the facilities or the student performance.
- C. *Important Improvements:* This level of improvements is required to accommodate educational program changes, address current educational needs, create greater operational efficiencies, or to provide quality of life improvements important to the school.



#### **4: HILLCREST MIDDLE SCHOOL**

725 Bloomfield Road, Sebastopol, CA 95472

(707) 823-7653

##### **Overview**

Principal: David Fichera

Grades: 6<sup>th</sup> through 8<sup>th</sup> Grades

Curriculum Snapshot: A California Distinguished School, Hillcrest offers advanced mathematics courses, a two-year laboratory science program, regular Spanish instruction for all students, and a strong music and performing arts program. Hillcrest graduates advance to Analy High School.



### **General Summary of Existing Conditions Noted:**

- Programmatic deficiencies noted:
  - There are no walkway covers to keep students dry when circulating between buildings
  - There is no shade in the lunch area
  - Student pick-up areas lack shelter from the elements
  - The Principal's Office is removed from the Administrative Offices
- Dry rot noted in numerous locations
- Building F: Music building has considerable dry rot.
- Accessibility upgrades required in various areas
- Existing roof is not at the end of its life, but should be replaced if solar is added.
- Solar Array Availability: Estimated that 3/4 of roof area could accommodate solar panels with system weight of 4lbs / square foot
- No fire suppression sprinklers currently on site: Additional buildings will likely trigger need for fire sprinklers, pump, and fire water storage tank.
- Mechanical: Repair storm drain lines
- Electrical:
  - Existing main switchboard is old and undersized
  - PGE service is undersized for the size of campus
  - Older T12 light lamps should be replaced
  - Fire alarm panel lacks addressable technology
  - Phone system is a discontinued outdated system
  - Public address system is non-operational
  - Clock system is non-operational likely due to condition of master clock, failing system clocks, and wiring
  - The Main Distribution Frame (MDF) is currently located in the school office with copper wiring and surface run raceways. This configuration is operational but has limited effectiveness for existing and future needs.



# PHOTOS OF EXISTING CONDITIONS



Building B at outside corner, showing weather exposure and separation at corner flashings



Building B at perimeter edge (south side.) Ponding water is more severe at this edge of the roof because there are no roof drains at the south end of the roof deck.



Building A, damaged door frame and downspout



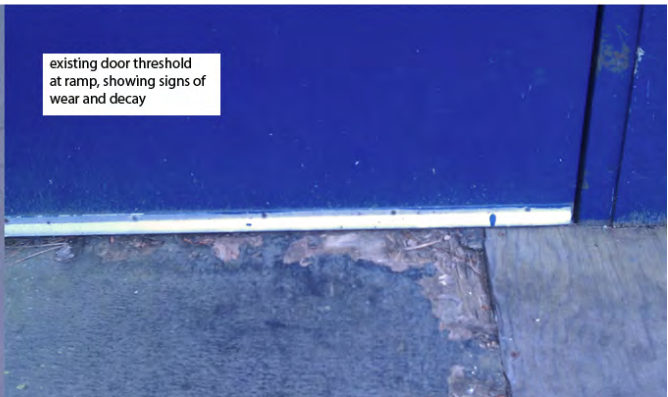
View of Building A, existing fascia shows signs of dry rot



Retrofit electrical penetration on Building A. Note that the penetration is not at a serviceable height and is not properly flashed.



Existing exterior recessed light fixtures are in need of replacement



existing door threshold at ramp, showing signs of wear and decay

## **HILLCREST MIDDLE SCHOOL**

### **Recommendations:**

#### Mandatory:

1. Accessibility upgrades
2. Fire Alarm Panel upgrades required by code

#### Necessary:

3. Replace main switchboard for the campus
4. Addition of a new 6,000 SF +/- wing comprising the following classrooms:  
(2) standard classrooms, (1) science classroom, (1) arts classroom, (1) music classroom
5. Not Used
6. Dry rot repair
  - a. Roof fascias
  - b. Exterior plaster corners
7. New pump house building
8. Repair of the storm drainage line on south and east ends of campus.

#### Important:

9. Proposed energy efficiency upgrades:
  - a. Insulation in the walls of the classrooms
  - b. Rigid insulation on the roof substrate prior to reroofing
  - c. Change glazing assemblies to insulated glass
10. New sheltered walkways strategically placed to connect the key buildings on campus
11. Natural solar shading in the lunch area
12. New shelter at the student pick-up zone, possibly attached to the face of the multi-use.
13. Addition of 5600 SF solar arrays on the roofs of the classroom buildings
14. New roof assemblies, including increased insulation.
15. Remodel of the Administrative Offices to include relocating the Principal into the Administrative Office.
16. New electrical systems including the following:
  - a. Upgrade the PGE service
  - b. Replace lighting in parking lot
  - c. Light fixture replacements to incorporate T8 or T5 lamping
  - d. Additional convenience outlets in the classrooms
  - e. Phone System replaced with VoIP system
  - f. Public Address System with UPS backup supply
  - g. Clock System including IP-based wiring and wireless technology
  - h. Category 6 wiring to be installed to support data needs
  - i. New IDF / MDF Locations
17. New concrete masonry unit trash enclosure

HILLCREST MIDDLE SCHOOL  
PROJECT PHASING: PHASE 1

The Master Plan implementation will be divided into phases based on funding constraints, impact to school activities, and logical clustering of the proposed improvements. The phasing has been crafted in response to feedback from the stakeholders and site committee.

Phase 1 of the Master Plan scope at Hillcrest Middle School includes the following proposed improvements:

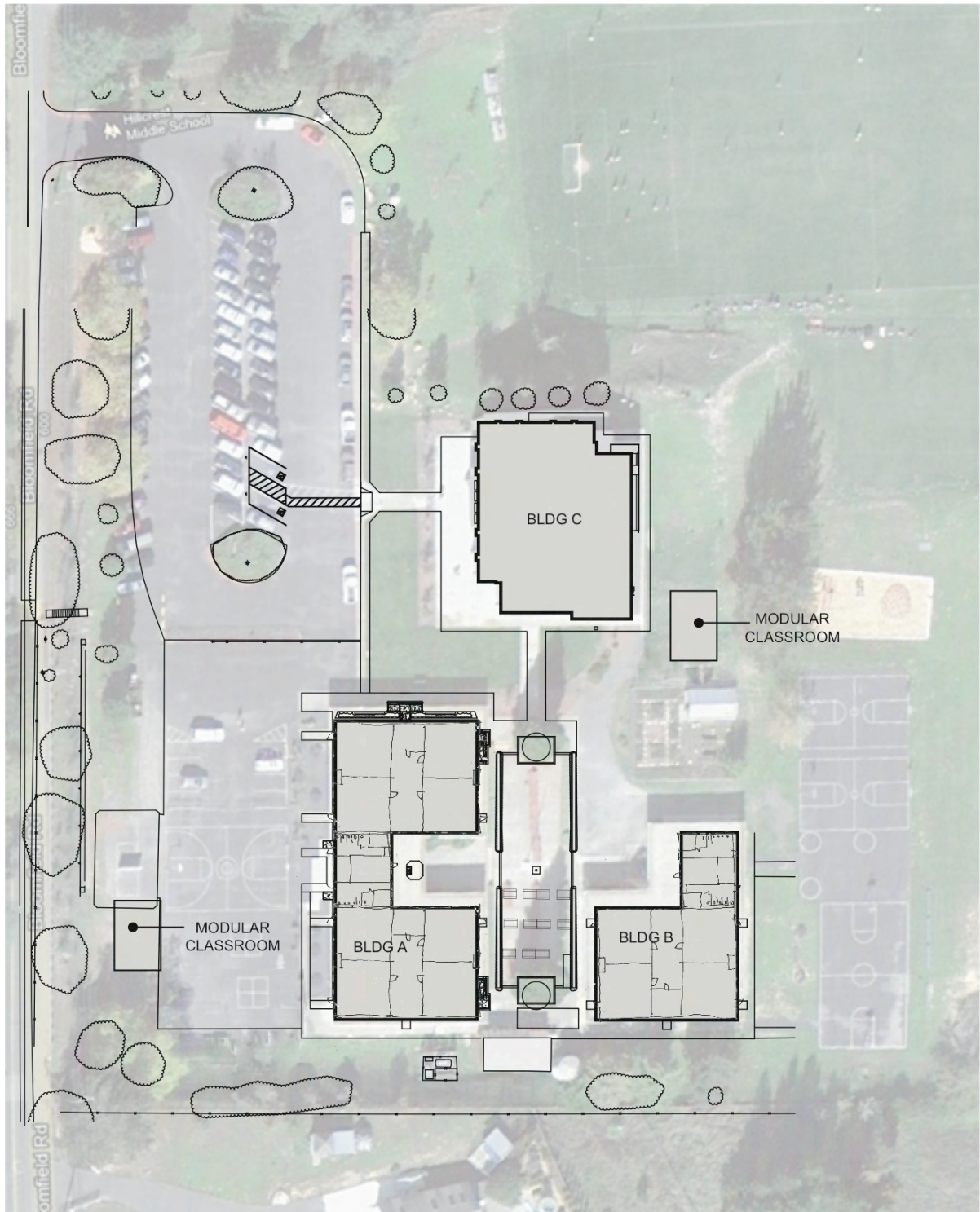
1. Addition of a new 3,000 SF +/- classroom wing to house a science classroom and a music room. The 1,800 SF music room will include instrument storage and performance riser. The 1,200 SF science room will include classroom and lab space.
2. Accessibility upgrades required by the California Building Code for the scope in Phase 1. A more detailed list of these upgrades is available in Appendix A available at the District office.
3. Fire alarm panel upgrade

Preliminary Construction Cost Estimate for Phase 1:

1. Science and Music classroom wing	\$ 1,456,000
2. Limited Accessibility Upgrades	\$ 321,300
3. Fire Alarm Panel Upgrades	\$ 17,100
4. Contingencies During Construction (10%)	\$ 179,400
Total:	\$ 1,973,800

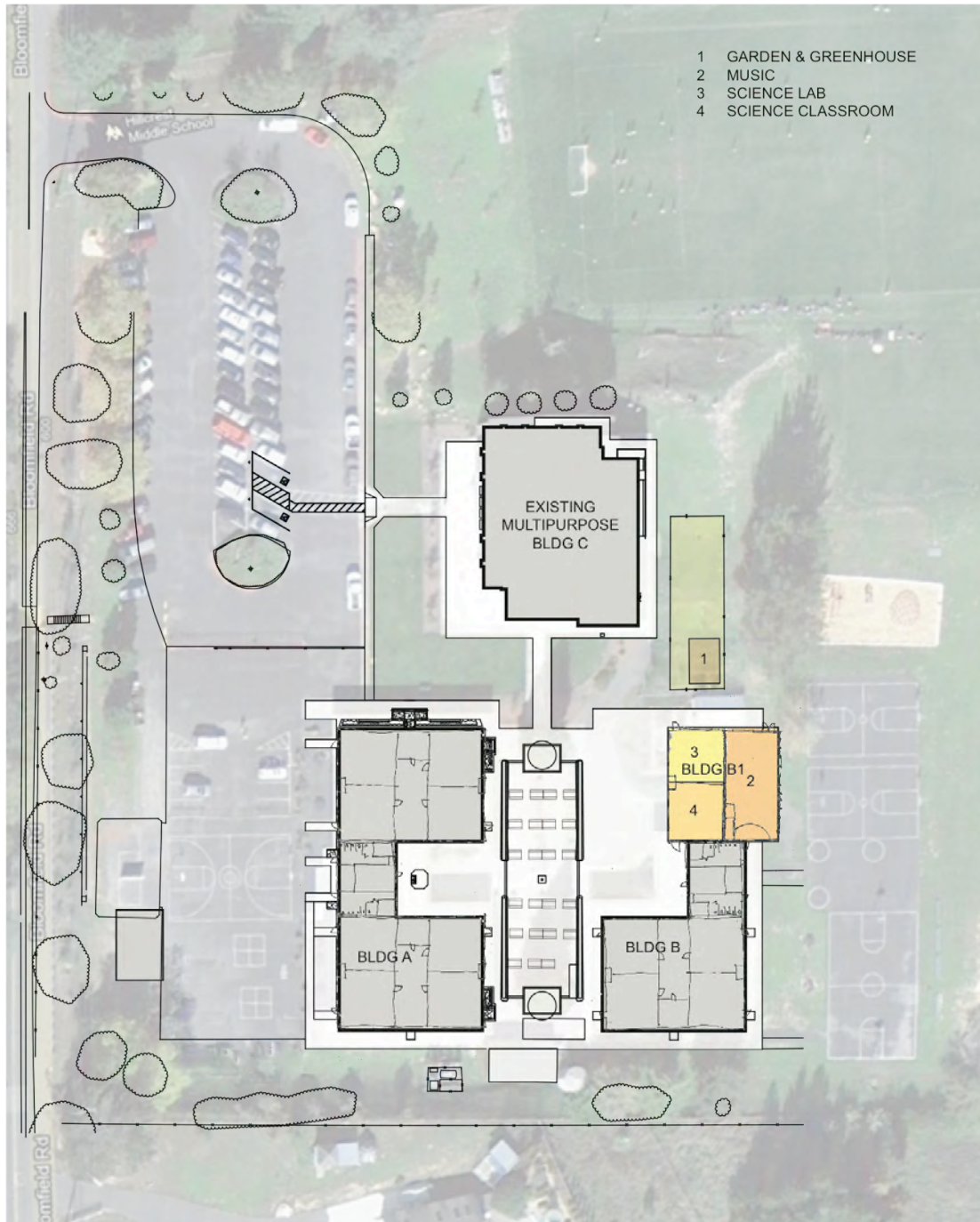


# HILLCREST MIDDLE SCHOOL – EXISTING SITE PLAN



HILLCREST MIDDLE SCHOOL - EXISTING CAMPUS

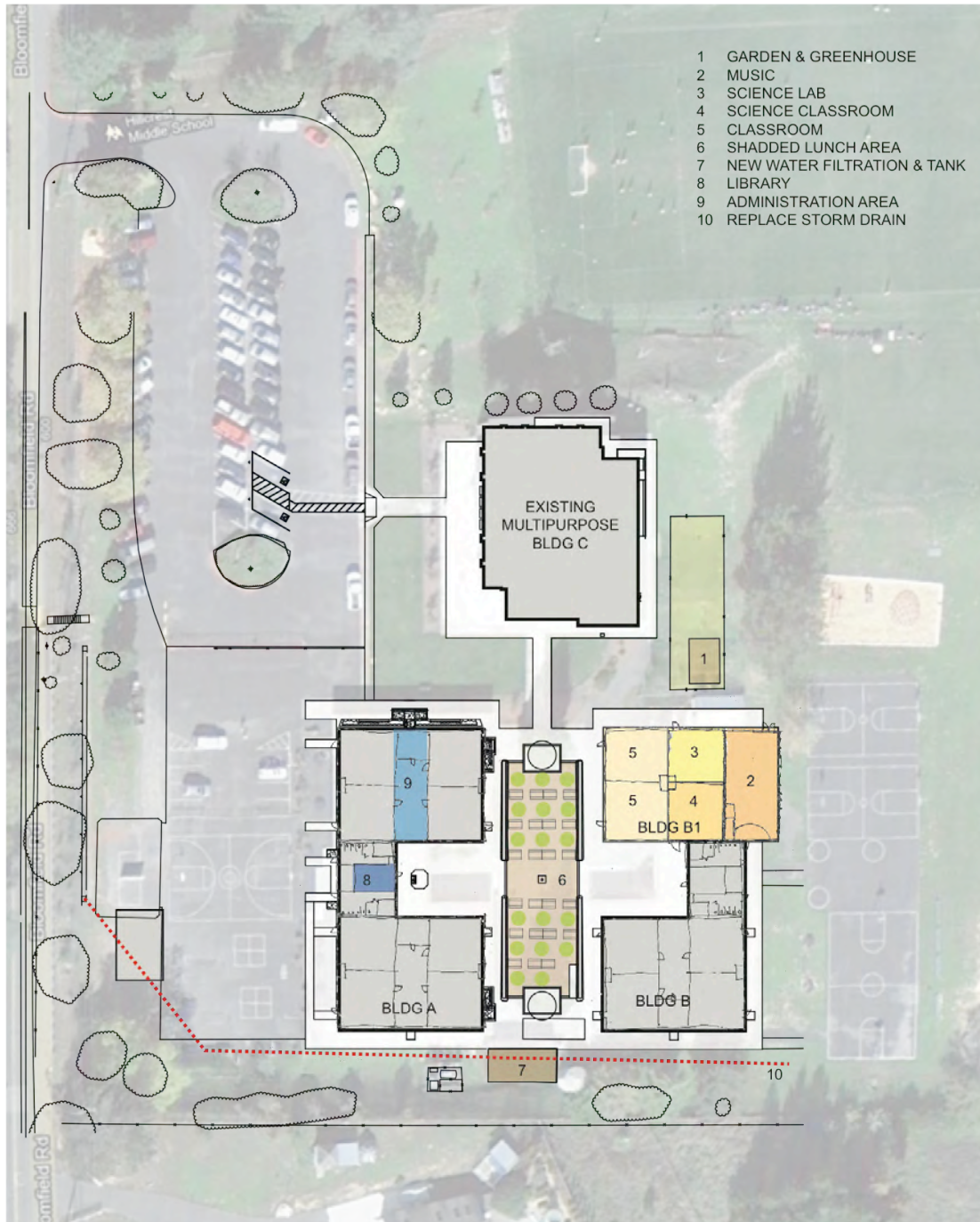
# HILLCREST MIDDLE SCHOOL – PHASE 1 OF MASTER PLAN



HILLCREST MIDDLE SCHOOL - PHASE 1



# HILLCREST MIDDLE SCHOOL - SITE MASTER PLAN



- 1 GARDEN & GREENHOUSE
- 2 MUSIC
- 3 SCIENCE LAB
- 4 SCIENCE CLASSROOM
- 5 CLASSROOM
- 6 SHADDED LUNCH AREA
- 7 NEW WATER FILTRATION & TANK
- 8 LIBRARY
- 9 ADMINISTRATION AREA
- 10 REPLACE STORM DRAIN

HILLCREST MIDDLE SCHOOL - MASTERPLAN



## REFERENCE IMAGES:

The following images are provided as examples of how other projects have incorporated features similar to those suggested for the courtyard of the Hillcrest campus.

### PLAZA CONCEPTS



### GOLDEN GATE MUSIC CONCOURSE



### TREE SHADED DINING AREAS



## **5: GRAVENSTEIN ELEMENTARY SCHOOL**

3840 Twig Avenue, Sebastopol, CA 95472

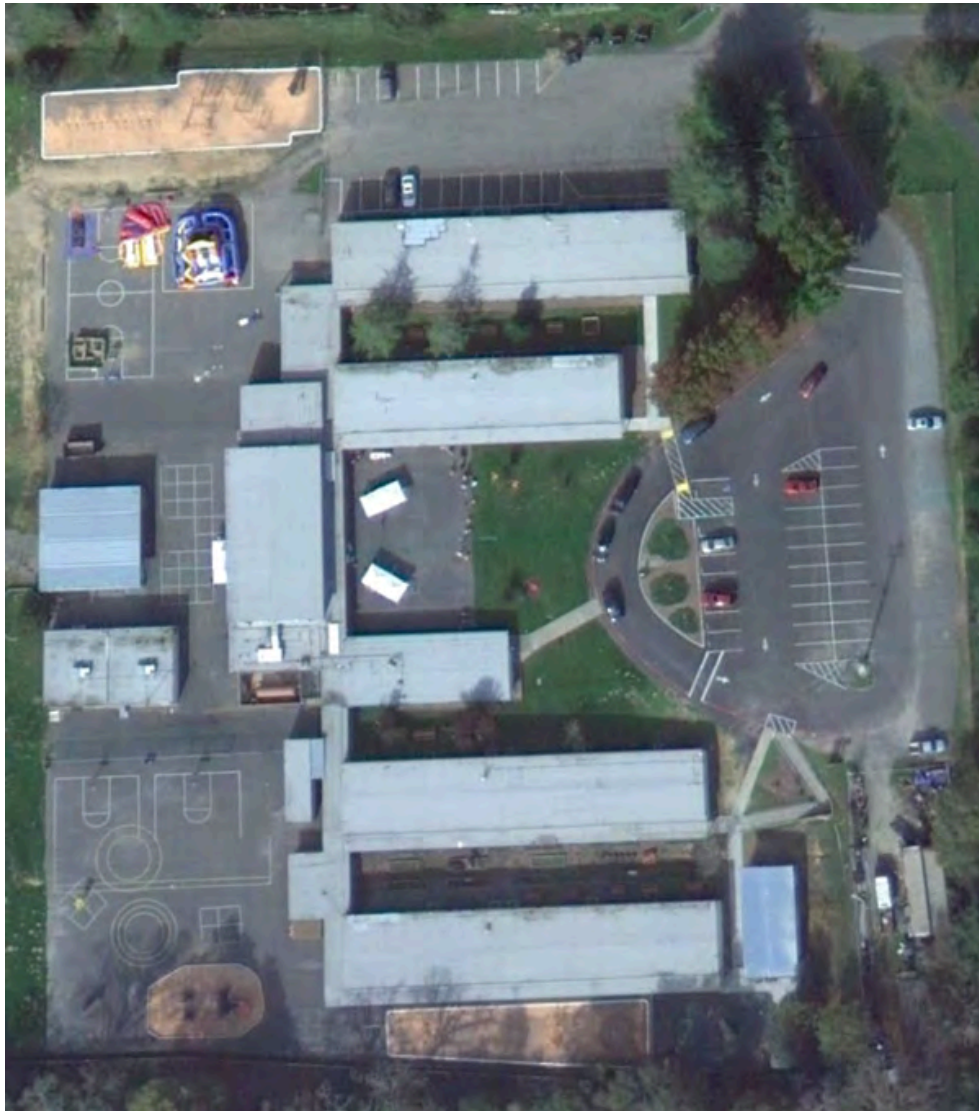
(707) 823-5361

### **Overview**

Principal: Linda LaMarre

Grades: Pre-Kindergarten through 5<sup>th</sup> Grade

Curriculum Snapshot: A California Distinguished School, Gravenstein Elementary School provides approximately 350 children with a strong academic program along with music, technology and the acclaimed "Artist in the Classroom" experience.



## **General Summary of Existing Conditions Noted:**

- Programmatic deficiencies noted:
  - The existing multi-use is insufficiently sized for current uses
  - The existing kitchen was designed for a food service program over 40 years ago
  - Parking lot back-up during pick-up/drop-off extends significantly down Twig Avenue
  - The Administrative office is not easily recognized from the parking lot
  - A significant number of classrooms have not been updated in about 25 years and are outdated in multiple ways.
  - Most restrooms rely on operable windows for ventilation
- Existing sewer, water, underground gas, and vent pipes are approximately 50 years old
- Dry rot noted in numerous locations
  - Roof fascia, walkway overhangs, window walls, wood sills
- The walkways lack seismic separation joints to allow the buildings to move more independently in an earthquake.
- Accessibility upgrades required in various areas
- Existing roof is at the end of its life and should be replaced
- Solar Array Availability: Estimated that 2/3rds of roof area could accommodate solar panels with system weight of 4lbs / SF or less
- Mechanical:
  - Most mechanical equipment on site is outdated and inefficient.
  - Most sinks, other than the wing modernized in 2007, are inaccessible
  - Restrooms in Administrative Office building are inaccessible
  - There is no seismic shutoff for the gas line into the campus
  - The District has not reported any problems with the well or septic.
- Electrical:
  - Existing main switchboard is undersized and may wish to be replaced
  - PGE service is undersized for the size of campus
  - Older T12 light lamps should be replaced
  - Fire alarm panel lacks addressable technology
  - Phone system is a discontinued outdated system
  - Public address system trunk wiring was replaced in 2005 and appears in good operation. The branch wiring from the distribution blocks to the speakers is likely original
  - Clock system is non-operational likely due to condition of master clock, failing system clocks, and wiring



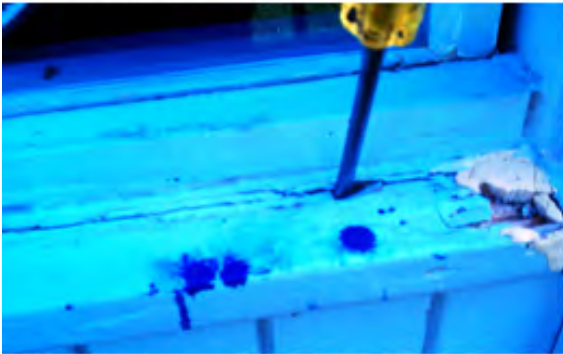
PHOTOS OF EXISTING CONDITIONS



DRY ROT TYPICAL AT WINDOWS EXPOSED TO THE WEATHER



DRY ROT TYPICAL AT EXPOSED WINDOW FRAMES



DRY ROT TYPICAL AT EXPOSED WINDOW SILL WHERE NO OVERHANG OCCURS



TYPICAL BUILDING FLOOR SILL PLATE IN CONTACT WITH GRADE. THIS WAS OBSERVED PRIMARILY AT THE EAST ENDS OF BUILDINGS A,B AND ADMIN



DAMAGED RAIN LEADER AND SURROUNDING FINISH MATERIALS



DRY ROT AT SIDING TRIM OBSERVED PRIMARILY AT BUILDINGS C, AND D

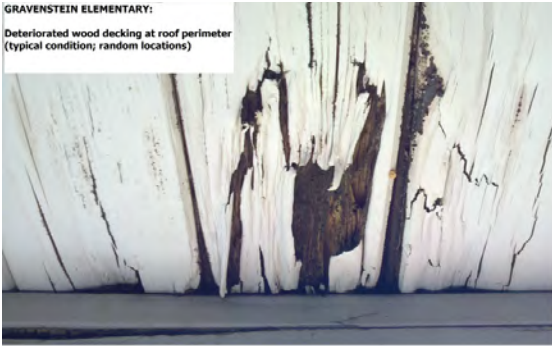


DRY ROTTING ROOF BEAM OBSERVED AT VARIOUS LOCATIONS

# PHOTOS OF EXISTING CONDITIONS

GRAVENSTEIN ELEMENTARY:

Deteriorated wood decking at roof perimeter (typical condition; random locations)



GRAVENSTEIN ELEMENTARY:

Deteriorated base of covered "daylight opening" over walkway canopy contiguous with the east side of the Multi-Use Building.

GRAVENSTEIN ELEMENTARY:

Deteriorated counter-flashing below window sill on the Multi-Use Building.

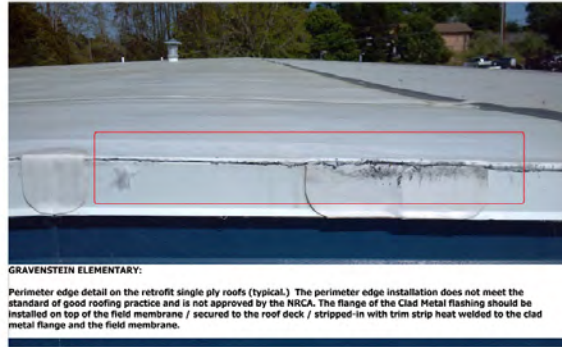
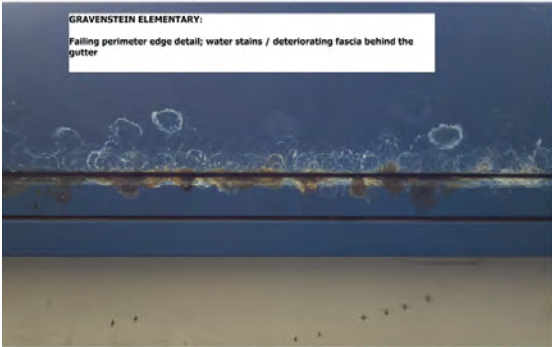


GRAVENSTEIN ELEMENTARY:

Deteriorated roof decking / support structure of the walkway canopy contiguous with the east side of the Multi-Use Building.

GRAVENSTEIN ELEMENTARY:

Falling perimeter edge detail; water stains / deteriorating fascia behind the gutter

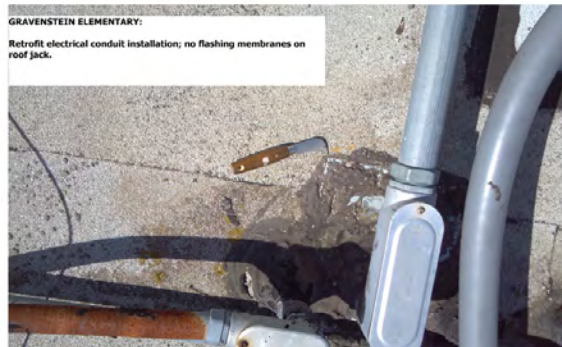


GRAVENSTEIN ELEMENTARY:

Perimeter edge detail on the retrofit single ply roofs (typical.) The perimeter edge installation does not meet the standard of good roofing practice and is not approved by the NRCA. The flange of the Clad Metal flashing should be installed on top of the field membrane / secured to the roof deck / stripped-in with trim strip heat welded to the clad metal flange and the field membrane.



GRAVENSTEIN ELEMENTARY:  
Evidence of roof repair. (Typical roof condition on all roof decks)



GRAVENSTEIN ELEMENTARY:

Retrofit electrical conduit installation; no flashing membranes on roof jack.

## **Recommendations:**

### Mandatory:

1. Install seismic expansion joints in the walkways between buildings
2. Accessibility upgrades

### Necessary:

3. Modernize majority of classrooms in 2015 when the campus becomes eligible for state modernization funds
4. Install new roof assemblies
5. Dry rot repair
  - a. Roof fascia, walkway overhangs, window walls, wood sills

### Important:

6. Expansion of the Multi-Use through one of three methods:
  - a. Replace roof/ceiling framing with longer beams and expand width of the room.
  - b. Relocate stage to the west side of the room and capture additional space on north side.
  - c. Demolish existing building and construct a new multi-use building
7. Alter overhang at walkway in front of multi-use to create amphitheater
8. Remodel the food service areas in the multi-use building
9. Proposed energy efficiency upgrades:
  - a. Insulation in the walls of the classrooms
  - b. Rigid insulation on the roof substrate prior to reroofing
  - c. Change glazing assemblies to insulated glass
  - d. Install more efficient mechanical and electrical systems
10. Addition of 5600 SF solar arrays on the roofs of the main classroom buildings
11. Remodel of the Administrative Offices to include accessible restrooms and identifiable entry
12. New electrical systems including the following:
  - a. Main switchgear to the campus
  - b. Upgrade the PGE service
  - c. Replace lighting in parking lot
  - d. Light fixture replacements to incorporate T8 or T5 lamping
  - e. Additional convenience outlets in the classrooms
  - f. Fire Alarm Panel
  - g. Phone System replaced with VoIP system
  - h. Public Address System with UPS backup supply
  - i. Clock System including IP-based wiring and wireless technology
  - j. Category 6 wiring to be installed to support data needs



GRAVENSTEIN ELEMENTARY SCHOOL  
PROJECT PHASING: PHASE 1

The Master Plan implementation will be divided into phases based on funding constraints, impact to school activities, and logical clustering of the proposed improvements. The phasing has been crafted in response to feedback from the stakeholders and site committee.

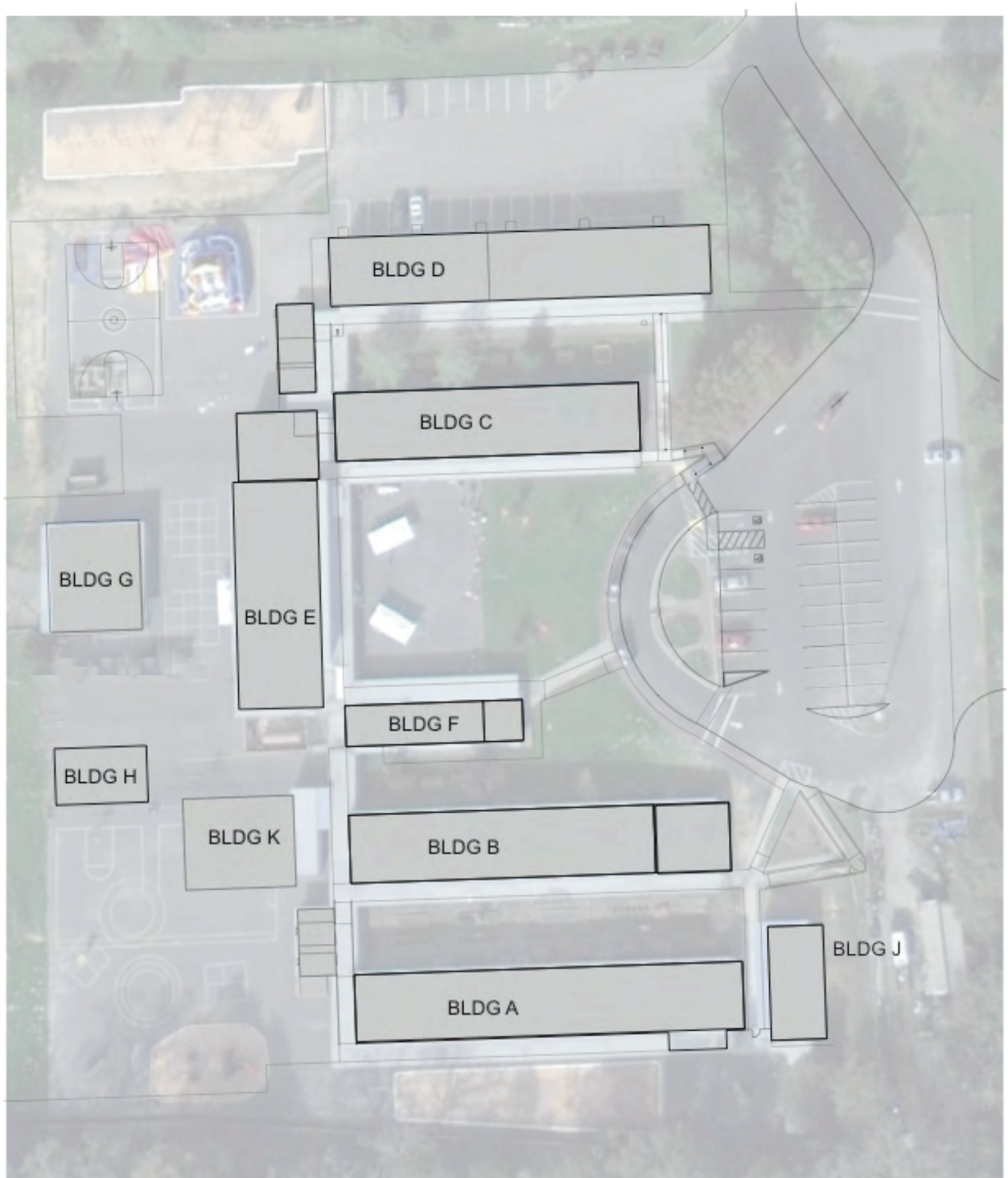
Phase 1 of the Master Plan scope at Gravenstein Elementary School includes the following proposed improvements:

1. Modernize majority of classrooms in 2015 when the campus becomes eligible for state modernization funds. Phase 1 includes a limited modernization focused on relamping light fixtures, replace mechanical units, Accessible sinks and cabinets, refurbished ceilings, and minor finish upgrades.
2. Accessibility upgrades required by the California Building Code for the scope in Phase 1. A more detailed list of these upgrades is available in Appendix A available at the District office.
3. Install seismic expansion joints in the walkways between buildings.

Preliminary Construction Cost Estimate for Phase 1:

5. Limited Modernization of Classrooms	\$ 2,521,000
6. Limited Accessibility Upgrades	\$ 1,395,000
7. Structural Seismic Joints at Canopies	\$ 21,700
8. Contingencies During Construction (10%)	<u>\$ 393,700</u>
Total:	\$ 4,331,400

# GRAVENSTEIN ELEMENTARY SCHOOL – EXISTING SITE PLAN



GRAVENSTEIN ELEMENTARY SCHOOL - EXISTING

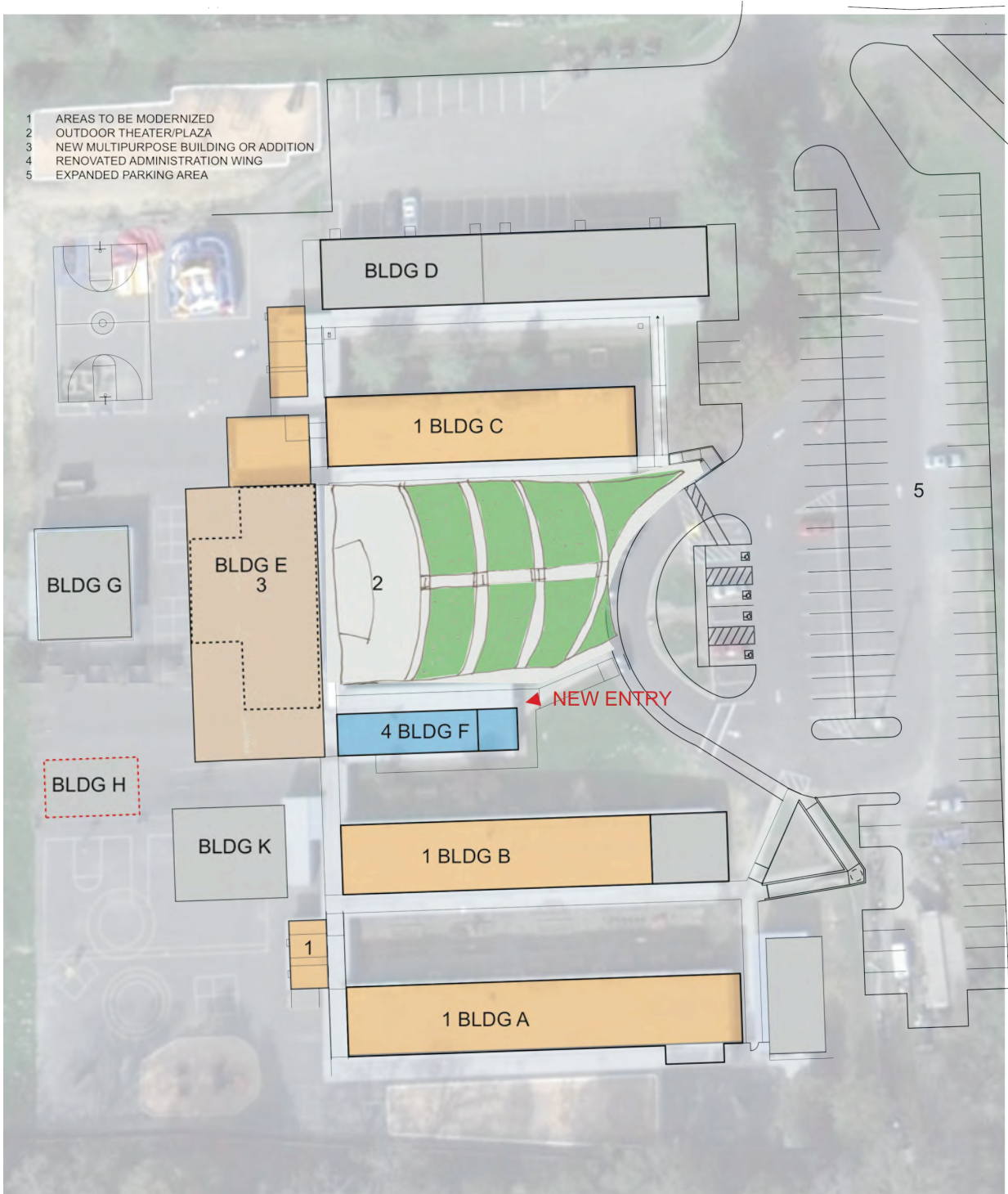


# GRAVENSTEIN ELEMENTARY SCHOOL – PHASE 1 PLAN



GRAVENSTEIN ELEMENTARY SCHOOL - PHASE 1

# GRAVENSTEIN ELEMENTARY SCHOOL - SITE MASTER PLAN



GRAVENSTEIN ELEMENTARY SCHOOL - MASTERPLAN



**REFERENCE IMAGES:**

The following images are provided as examples of how other projects have incorporated features similar to those suggested for the Gravenstein Elementary School campus plaza and amphitheater.

GRASS AMPHITHEATERS



GRANT ELEMENTARY



REDDING SCHOOL FOR THE ARTS



OUTDOOR THEATERS



## **6: MASTER PLANNING FOR THE FUTURE:**

True to the intent of master planning, it is acknowledged that Phase 1 of the implementation plan does not cover all of the needs at the District's facilities. This Section of the GUSD Master Plan is intended to summarize a more holistic review of the identified scope and costs associated with addressing the needs of the District's facilities. These items are cross-referenced from the lists of needs identified in Sections 4 and 5 of this document. The District has not identified funding sources or time frames yet for items beyond Phase 1. Like many Districts in California, GUSD can continue to monitor available funding sources and utilize this document as a referenced implementation plan into the future.

Appendix A, available at the District Office, includes a detailed breakdown of the assessments and cost estimates associated with the enclosed summaries.

**Hillcrest Middle School  
FACILITY UPGRADES  
Sebastopol, California  
CONCEPTUAL CONSTRUCTION COST ESTIMATE**

**SUMMARY**

<u>ITEM OF WORK</u>	<u>Cost</u>
<i>Mandatory:</i>	
1 Buildings A&B / Accessibility Upgrades	1,185,744
2 Fire Alarm Panel Upgrades	\$17,079
<i>Necessary:</i>	
3 Electrical Service Upgrades	353,238
4 New Building Wing	\$2,559,223
4B Fire Sprinklers at Existing Building B	316,669
6 Buildings A&B / Dry Rot Repair	636,153
7 New Well House	170,496
8 Storm Water System Upgrades	86,233
<i>Important:</i>	
9A New Insulated Windows	243,141
9B Insulate Walls at A & B	175,112
10 Walkway Covers	181,738
11 Lunch Courtyard Shading and Renovations	132,445
12 Walkway Canopy to Multi Purpose Bldg	665,562
13 Photo Voltaic Power System	712,879
14 New Roof on Bldgs A & B	619,808
15 Library Remodel	466,443
16A Electrical Upgrades	198,521
16B Phone System Upgrade	65,373
Hazardous Materials Abatement	1,577,837
<b>Total Cost Prediction</b>	<b>\$10,363,694</b>

**EXCLUSIONS:**

**Excludes 100% of Soft Costs (typically 30% of Hard Cost PLUS CO Contingency)**  
**Excludes 10% Change Order Contingency at Time of Bid Award**

Printed on 8/20/12



**Gravenstein Elementary School  
FACILITY UPGRADES  
Sebastopol, California  
CONCEPTUAL CONSTRUCTION COST ESTIMATE**

**SUMMARY**

<u>ITEM OF WORK</u>	<u>Cost</u>
<i>Mandatory:</i>	
1 Structural / Seismic Joint Installation	21,660
2 ADA Accessibility	\$1,890,026
<i>Necessary:</i>	
3 Classroom Modernizations	5,909,242
4 Replace All Roofs	782,526
5a Walkway Overhang Dryrot Repair	412,474
5b Beam End Repair at Overhangs	17,682
5c Ledger Deterioration at Multi Use	1,198
5d Dryrot Repair at Windows - North	775,690
5e Wood Sill Dryrot Repair	23,911
<i>Important:</i>	
6 New Multi Use - Replacement Option	3,690,013
9 Insulation of Walls: Incl in Modernization - Item 3	
Replace windows w/insulated units - Incl. in Item 5	
Replacement of mechanical units - Incl. in Item 3	
9 Energy Upgrades	940,072
10 Photovoltaic Panel Installation	712,879
12a Power Upgrades	379,359
12b Electrical Upgrades	363,486
12c Replace Phone System	87,900
13 Well Equipment Replacement	
14 Parking and Drop Off Improvements	915,353
15 Hazardous Materials Abatement	1,577,837
<b>Total Cost Prediction</b>	<b>\$18,501,308</b>

**EXCLUSIONS:**

**Excludes 100% of Soft Costs (typically 30% of Hard Cost PLUS CO Contingency)**  
**Excludes 10% Change Order Contingency at Time of Bid Award**

**AGREEMENT FOR CONSTRUCTION PROJECT  
MANAGEMENT SERVICES**

THIS AGREEMENT is made by and between the \_\_\_\_\_ School District, a political subdivision of the State of California ("DISTRICT"), and \_\_\_\_\_, a California corporation, ("PROJECT MANAGER").

The DISTRICT and PROJECT MANAGER hereby agree as follows:

1.     Description of Services:  
PROJECT MANAGER agrees to provide construction project management services as set forth in Attachment B to DISTRICT in conjunction with the projects identified in Attachment A (individually called "PROJECT" and collectively called "PROJECTS").
  
2.     Selection and Qualifications of PROJECT MANAGER:  
PROJECT MANAGER was selected to perform the services under the Agreement in compliance with Government Code section 4529.10 *et seq.* DISTRICT has determined that PROJECT MANAGER is licensed as a General Building Contractor by the State of California (# \_\_\_\_\_) and possesses the demonstrated competence and professional qualifications for the services to be performed.
  
3.     Contract Documents:  
The contract documents consist of the Agreement for Construction Project Management Services, the General Provisions, Attachments "A", "B", and "C" and completed insurance forms.
  
4.     Compensation:  
As full compensation for all services contemplated by this Agreement, PROJECT MANAGER shall be paid as set forth in Attachment "C."
  
5.     Term of Agreement:  
This Agreement begins effective \_\_\_\_\_, 2016, and completes upon completion of services under the Agreement, unless terminated sooner, whether pursuant to the provisions of Section 7 of the General Provisions or otherwise.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement on the day and year written below.

\_\_\_\_\_ School District

[Project Manager Name]

By: \_\_\_\_\_

By: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

## GENERAL PROVISIONS

### (AGREEMENT FOR CONSTRUCTION PROJECT MANAGEMENT SERVICES)

1. ASSIGNMENT/DELEGATION: Neither party hereto shall assign or transfer any interest in this Agreement or any duty hereunder without written consent of the other, and no assignment shall be of any force or effect whatsoever unless and until the other party shall have so consented.
2. STATUS OF PROJECT MANAGER: The parties intend that PROJECT MANAGER, in performing the services herein specified, shall act as an independent contractor and shall have control of the work and the manner in which it is performed. PROJECT MANAGER is not to be considered an agent or employee of DISTRICT and is not entitled to participate in any pension plans, insurance, bonus or similar benefits DISTRICT provides its employees.
3. INDEMNIFICATION:
  - (a) PROJECT MANAGER shall indemnify, defend with counsel acceptable to DISTRICT, and hold harmless to the full extent permitted by law, DISTRICT and its Board of Trustees, officers, agents, employees and volunteers from and against any and all liability, loss, damage, claims, expenses and costs (including, without limitation, attorney fees and costs and fees of litigation) (collectively, "Liability") of every nature in connection with PROJECT MANAGER'S performance of the project or its failure to comply with any of its obligations contained in these contract documents, except such Liability cause by the sole negligence or willful misconduct of the DISTRICT. This indemnification obligation is not limited in any way by any limitation on the amount or type of damages or compensation payable to or for PROJECT MANAGER or its agents under workers' compensation acts, disability benefit acts, or other employee benefit acts.
  - (b) PROJECT MANAGER shall be liable to DISTRICT for any loss or damage to DISTRICT property arising from PROJECT MANAGER's performance hereunder.
  - (c) The obligations set forth in this section 3 shall continue beyond the term of this Agreement as to any act or omission which occurred during or under this Agreement.
4. INSURANCE: With respect to the performance of work under this Agreement, PROJECT MANAGER shall maintain and shall require all of its subconsultants to maintain insurance as described below:
  - (a) Worker's compensation insurance with statutory limits as required by the Labor Code or the State of California. Said policy shall be endorsed with the following specific language: "This policy shall not be canceled or materially changed without first giving thirty (30) days prior written notice to the DISTRICT."
  - (b) Commercial or Comprehensive General Liability insurance covering bodily injury and property damage utilizing an occurrence policy form, in an amount no less than \$1,000,000 combined single limit for each occurrence. Said insurance shall include, but not be limited to: premises and operations liability, independent contractors' liability, and personal injury liability.
  - (c) Automobile liability insurance covering bodily injury and property damage in an amount no less than \$1,000,000 combined single limit for each occurrence. Said insurance shall include coverage for owned, hired, and non-owned vehicles.



- (d) Each said comprehensive or commercial general liability and automobile liability insurance policy shall be endorsed with the following specific language:
- (1) DISTRICT, its officers and employees, is named as additional insured for all liability arising out of the operations by or on behalf of the named insured in the performance of this Agreement.
  - (2) The inclusion of more than one insured shall not operate to impair the rights of one insured against another insured, and the coverage afforded shall apply as though separate policies had been issued to each insured, but the inclusion of more than one insured shall not operate to increase the limits of the company's liability.
  - (3) The insurance provided herein is primary coverage to DISTRICT with respect to any insurance or self-insurance programs maintained by DISTRICT and no insurance held or owned by DISTRICT shall be called upon to contribute to a loss.
  - (4) This policy shall not be canceled or materially changed without first giving thirty (30) days prior written notice to DISTRICT.
- (e) Professional Liability (Errors and Omissions) Insurance for all activities of the PROJECT MANAGER arising out of or in connection with this Agreement is an amount no less than \$1,000,000 combined single limit for each occurrence endorsed with the following specific language: "This policy shall not be canceled or materially changed without first giving thirty (30) days prior written notice to DISTRICT."
- (f) Documentation: The following documentation shall be submitted to the DISTRICT:
- (1) Properly executed Certificates of Insurance clearly evidencing all coverages, limits, and endorsements required above. Said certificates shall be submitted prior to the execution of this Agreement.
  - (2) Signed copies of the specified endorsements for each policy. Said endorsement copies shall be submitted within thirty (30) days of execution of this Agreement.
  - (3) Upon DISTRICT's written request, certified copies of insurance policies. Said policy copies shall be submitted within thirty (30) days of DISTRICT's request.
- (g) Policy Obligations: PROJECT MANAGER's indemnity and other obligations shall not be limited by the foregoing insurance requirements.
- (h) Material Breach: If PROJECT MANAGER, for any reason, fails to maintain insurance coverage which is required pursuant to this Agreement; the same shall be deemed a material breach of contract. DISTRICT, at its sole option, may terminate this Agreement and obtain damages from the PROJECT MANAGER resulting from said breach. Alternatively, DISTRICT may purchase such required insurance coverage, and without further notice to PROJECT MANAGER, DISTRICT may deduct from sums due to PROJECT MANAGER any premium costs advanced by DISTRICT for such insurance. These remedies shall be in addition to any other remedies available to DISTRICT.

5. METHOD AND PLACE OF GIVING NOTICE, SUBMITTING BILLS AND MAKING PAYMENTS: All notices, bills and payments shall be made in writing and may be given by personal delivery or by mail. Notice, bills and payments sent by mail shall be addressed as follows:

DISTRICT:

PROJECT MANAGER:

and when so addressed, shall be deemed given upon receipt via United States Mail, postage prepaid, provided it is forwarded "certified," or "registered" with proof of receipt. In all other instances, notices, bills, and payments shall be deemed given at the time of actual personal delivery. Changes may be made in names and addresses of the person to whom notices, bills, and payments are to be given by giving notice pursuant to this paragraph.

6. MERGER: This writing is intended both as the final expression of the Agreement between the parties hereto with respect to the included terms and as a complete and exclusive statement of the terms of the Agreement. No modification of this Agreement shall be effective unless and until such modification is evidenced by a writing signed by both parties.
7. TERMINATION AND SUSPENSION:
  - (a) If either party fails to perform any of its obligations hereunder, within the time and in the manner hereunder provided or otherwise violates any of the terms of the Agreement, either party may terminate this Agreement by giving written notice of such termination, stating the reason for such termination. In such event, PROJECT MANAGER shall be entitled to receive payment for all services satisfactorily rendered provided, however, that there shall be deducted from such amount the amount of liquidated damage, if any, sustained by DISTRICT by virtue of any breach of the Agreement by PROJECT MANAGER.
  - (b) DISTRICT shall also have the right in its sole discretion to terminate the Agreement for its own convenience and without cause by giving thirty (30) calendar days written notice to PROJECT MANAGER. Upon written notice from the DISTRICT of such termination, shall immediately cease work under the Agreement, except such work as may be required to comply with Section 12(b) of this Agreement. The DISTRICT shall pay the PROJECT MANAGER only the fee associated with the services provided since the last invoice that has been paid and up to the notice of termination, except for the fee for such work as may be required to comply with Section 12(b) of this Agreement.
  - (c) Termination of the Agreement shall have no effect upon any of the rights and obligations of the parties arising out of any transaction occurring prior to the effective date of such termination.
  - (d) If, at any time, the DISTRICT determines that any of the individual PROJECTS should be terminated, the PROJECT MANAGER, upon written notice from the DISTRICT of such termination, shall immediately cease work on the PROJECT(S) so terminated, except such work as may be required to comply with Section 12(b) of this Agreement. For any such PROJECT(S), the DISTRICT shall pay the PROJECT MANAGER only the fee associated with the services provided since the last invoice that has been paid and up to the notice of termination, except the fee for such work as may be required to comply with Section 12(b) of this Agreement. PROJECT MANAGER agrees to continue to perform all non-terminated portions of this Agreement in that case, and the Parties agree that PROJECT MANAGER'S compensation shall be adjusted accordingly.
  - (e) DISTRICT retains the right to terminate, either for convenience or for cause, PROJECT MANAGER'S performance on any of the individual PROJECTS. Upon written notice

from the DISTRICT of such termination, shall immediately cease work on the PROJECT(S) on which PROJECT MANAGER's services have been so terminated, except such work as may be required to comply with Section 12(b) of this Agreement. For any such PROJECT(S), the DISTRICT shall pay the PROJECT MANAGER only the fee associated with the services provided since the last invoice that has been paid and up to the notice of termination, except the fee for such work as may be required to comply with Section 12(b) of this Agreement. PROJECT MANAGER agrees to continue to perform all non-terminated portions of this Agreement in that case, and the Parties agree that PROJECT MANAGER'S compensation shall be adjusted accordingly.

- (f) DISTRICT also retains the right to suspend, either for convenience or for cause, PROJECT MANAGER'S performance of services under the Agreement as to any or all of the individual PROJECTS. Upon written notice from the DISTRICT of such suspension, shall immediately cease work on any PROJECT(S) so suspended. The DISTRICT shall pay the PROJECT MANAGER only the fee associated with the services provided since the last invoice that has been paid and up to the notice of suspension.

- 8. TRANSFER OF RIGHTS: PROJECT MANAGER assigns to DISTRICT all rights throughout the work in perpetuity in the nature of copyright, trademark, patent, right to ideas, in and to all versions of the plans and specifications now or later prepared by PROJECT MANAGER in connection with the project, if any.

PROJECT MANAGER agrees to take such actions as are necessary to protect the rights assigned to DISTRICT in this Agreement, and to refrain from taking any action which would impair those rights. PROJECT MANAGER's responsibilities under this contract include, but are not limited to, placing proper notice of copyright on all versions of the plans and specifications as PROJECT MANAGER may direct, and refraining from disclosing any versions of the plans and specifications to any third party without first obtaining written permission of DISTRICT.

- 9. NONDISCRIMINATION: PROJECT MANAGER shall comply with all applicable federal, state and local laws, rules and regulations in regard to nondiscrimination in employment because of race, color, ancestry, national origin, religion, sex, marital status, age, medical condition, handicap or other prohibited basis. All nondiscrimination rules or regulations required by law to be included in this Agreement are incorporated by this reference.

- 10. EXTRA (CHANGED) WORK: Only the Superintendent may authorize extra (and/or changed) work. The parties expressly recognize that DISTRICT and School personnel are without authorization to either order extra (and/or changed) work or waive contract requirements. Failure of the PROJECT MANAGER to secure proper authorization for extra work shall constitute a waiver of any and all right to adjustment in the contract price or contract time due to such unauthorized extra work and the PROJECT MANAGER thereafter shall be entitled to no compensation whatsoever for the performance of such work.

- 11. CONFLICT OF INTEREST: PROJECT MANAGER represents that it presently has no interest which would conflict in any manner or degree with the performance of services contemplated by this Agreement. PROJECT MANAGER further represents that in the performance of this Agreement, no person having such interest will be employed.

- 12. OWNERSHIP OF WORK PRODUCT:

- (a) DISTRICT shall be the owner of and shall be entitled to immediate possession of accurate reproducible copies of any design computations, plans, correspondence or other pertinent data and information gathered or computed by PROJECT MANAGER prior to termination of this Agreement by DISTRICT or upon completion of the work pursuant to this Agreement.

- (b) After completion of each PROJECT, after termination by DISTRICT of PROJECT MANAGER's services as to any PROJECT, and after termination of this Agreement, PROJECT MANAGER shall deliver to DISTRICT a complete set of PROJECT records for each PROJECT on which services were provided, including without limitation all documents generated by PROJECT MANAGER, copies of all documents exchanged with or copied to or from all other PROJECT participant, and all closeout documents. Said PROJECT records for each PROJECT shall be indexed and appropriately organized for easy use by DISTRICT personnel.
  - (c) The parties understand that under this Section 12, all documentation generated by PROJECT MANAGER will be turned over to the school district and that PROJECT MANAGER has no patent or copyright materials and/or product any such items that require this section in the contract.
13. PROJECT MANAGER'S WARRANTY: DISTRICT has relied upon the professional ability and training of PROJECT MANAGER as a material inducement to enter into this Agreement. PROJECT MANAGER hereby warrants that all its work will be performed in accordance with generally accepted professional practices and standards as well as the requirements of applicable federal, state and local laws, it being understood that acceptance of PROJECT MANAGER's work by DISTRICT shall not operate as a waiver or release.
  14. TAXES: PROJECT MANAGER agrees to file federal and state tax returns and pay all applicable state and federal taxes on amounts paid pursuant to this Agreement. In case DISTRICT is audited for compliance regarding any applicable taxes, PROJECT MANAGER agrees to furnish DISTRICT with proof of payment of taxes on those earnings.
  15. DUE PERFORMANCE: Each party to this Agreement undertakes the obligation that the other's expectation of receiving due performance will not be impaired. When reasonable grounds for insecurity arise with respect to the performance of either party, the other may, in writing, demand adequate assurance of due performance and until such written assurance is received may, if commercially reasonable, suspend any performance for which the agreed return has not been received.
  16. NO THIRD-PARTY BENEFICIARIES: There are no intended third-party beneficiaries of this Agreement.
  17. NO WAIVER OF BREACH: The waiver by DISTRICT of any breach of any term or promise contained in this Agreement shall not be deemed to be a waiver of any subsequent breach of the same or any other term or promise contained in this Agreement.
  18. FINGERPRINTING. By execution of the Agreement/Contract, the PROJECT MANAGER acknowledges that Education Code Section 45125.1 applies to contracts for the provision of school and classroom janitorial, school site administrative, school site grounds and landscape maintenance, pupil transportation and school site food-related services. Section 45125.1 requires that employees of entities providing such services to school districts must be fingerprinted by the California Department of Justice for a criminal records check, unless the DISTRICT determines that the PROJECT MANAGER and PROJECT MANAGER's employees will have limited contact with pupils. In making this determination, the DISTRICT will consider the totality of the circumstances, including factors such as the length of time the PROJECT MANAGER and PROJECT MANAGER's employees will be on school grounds, whether pupils will be in proximity with the site where the PROJECT MANAGER and PROJECT MANAGER's employees will be working, and whether the PROJECT MANAGER and PROJECT MANAGER's employees will be alone or with others. The DISTRICT further reserves the right to determine, on a case-by-case basis, to require any entity providing school site services to comply with the requirements of this paragraph.

(a) **DISTRICT Determination of Fingerprinting Requirement Application**

**The DISTRICT has considered the totality of the circumstances concerning the Project and has determined that the PROJECT MANAGER and PROJECT MANAGER's employees:**

\_\_\_\_\_ **are subject to the fingerprinting requirements of Education Code Sections 45125.1 and Paragraph (b) below, is applicable.**

\_\_\_\_\_ **are not subject to the fingerprinting requirements of Education Code Section 45125.1 and Paragraph (c) below, is applicable.**

- (b) If the DISTRICT has determined that fingerprinting is required, the PROJECT MANAGER expressly acknowledges that: (1) PROJECT MANAGER and all of PROJECT MANAGER's employees working on the school site must submit or have submitted fingerprints in a manner authorized by the Department of Justice, together with the requisite fee as set forth in Education Code Section 45125.1; (2) PROJECT MANAGER shall not permit any employee to come in contact with students until the Department of Justice has ascertained that the employee has not been convicted of a serious or violent felony; (3) PROJECT MANAGER shall certify in writing to the Governing Board of the DISTRICT that none of its employees who may come in contacts with students have been convicted of a serious or violent felony; and (4) PROJECT MANAGER shall provide to the Governing Board of the DISTRICT a list of names of its employees who may come in contact with students. The PROJECT MANAGER is required to fulfill these requirements at its own expense.
- (c) Even if the DISTRICT has determined that fingerprinting is not required, the PROJECT MANAGER expressly acknowledges that the following conditions shall apply to any work performed by the PROJECT MANAGER and/or PROJECT MANAGER's employees on a school site: (1) PROJECT MANAGER and PROJECT MANAGER's employees shall check in with the school office each day immediately upon arriving at the school site; (2) PROJECT MANAGER and PROJECT MANAGER's employees shall inform school office staff of their proposed activities and location at the school site; (3) Once at such location, PROJECT MANAGER and PROJECT MANAGER's employees shall not change locations without contacting the school office; (4) PROJECT MANAGER and PROJECT MANAGER's employees shall not use student restroom facilities; and (5) If PROJECT MANAGER and/or PROJECT MANAGER's employees find themselves alone with a student, PROJECT MANAGER and PROJECT MANAGER's employees shall immediately contact the school office and request that a member of the school staff be assigned to the work location.

19. APPLICABLE LAW: The laws of the State of California govern this Contract. Each and every provision of law and clause required by law to be included in the Contract shall be deemed to be inserted herein and the Contract shall be read and enforced as though it were included. Solano County, California, in which the DISTRICT is located, shall be the venue for any action or proceeding that may be brought or arise out of, in connection with or by reason of this Agreement, and no other place.

20. REPORTS TO IRS: The parties understand that Federal Internal Revenue regulations require this office to report all payments to PROJECT MANAGER for services.

21. DISPUTE RESOLUTION PROVISIONS:

(a) **MEDIATION**

- (1) Any claim, dispute or other matter in question arising out of or related to this Agreement may be subject to mediation if the parties mutually agree.

- (2) A request for mediation shall be filed in writing with the other party to this Agreement.
- (4) The parties shall share the mediator's fee and any filing fees equally. The mediation shall be held in the place where the Project is located, unless another location is mutually agreed upon.

## **Attachment A**

The Project Manager shall assist the District with all project as assigned in writing by

\_\_\_\_\_.

# Attachment B

## SCOPE OF SERVICES

**Program and Design Phase Services:** Project Manager shall provide the necessary service to implement the District's Master Plan. The Project may be asked to perform the following scope of services.

- a. Assist the District with the updating the master schedule.
- b. Assist the District with Site Design Committee Meetings at each school site.
- c. Work with the Architect and District Consultants (CEQA, Hazmat, Surveying, Geotechnical, and others) to develop and refine the design plan at each school. Coordinate the work of the Architect and consultants as needed.
- d. Perform Constructability Reviews of every project on plans and specifications with written comments at the 75% and 90% of the design drawings. Review should include but not be limited to site visit, as built check, constructability issues, site access, phasing plan, and detailed coordination of drawings and specification. CM is required to back check and verify that comments in the reviews have been addressed by the Architect.
- e. Cost estimating services at various stages (schematic design, design development, 75% construction documents, and completed construction documents) of each project to ensure design work is within program budget. Coordinate estimating work with the Architect and recommend areas of value engineering to the District.
- f. Scheduling services to assist in achieving the required design, submission, and approval of the plans of the Master Schedule milestones. Report on a regular basis the status of all design work including local and state agency approvals.
- g. Coordinate with the Architect and District in developing detailed construction phasing and coordination plans.
- h. Assist the District with any utility coordination, permits, service upgrades and connections as related the program.
- i. Attend bi-weekly District Facility Committee meetings.
- j. Provide assistance and advice on hiring Project Inspectors and other consultants needed.
- k. Provide document control and filing of all relevant program documents.

**Bid and Award Phase Services:** Provide comprehensive bid and award phase services including the following:

- a. Assist the District with bid marketing to ensure the most responsive and competitive bids.
- b. Assist the District with pre-bid walks and bidder orientation.
- c. Assist the District with reviewing bids for responsiveness and advice on any bidding issues or complications. Assist the District with pre-construction tasks.
- d. Assist in processing executed contracts, purchase orders, insurance certificates, performance and payment bonds, and distribution of contract to all legal parties.

**Construction Phase Services:** Provide comprehensive Construction Management services for the projects included in the Master Plan. Project Manager is to assume all management and coordination responsibilities for construction activities, including but not limited to the following:

- a. Scheduling services to monitor construction phase work, evaluate contractor baseline schedule, all monthly updates, and all two week look-ahead schedules. Maintain separate as built schedule.
- b. Provide cost estimating services required to review, reconcile, and validate contractor change order submission.
- c. Track all construction cost vs. budgets and report to the District on a regular basis.
- d. Review quality and correctness of work and report any deficiencies not corrected by the



contractor to District.

- e. Provide filing system for all projects.
- f. Verify contractor is implementing CHPS requirements as specified in the contract documents.
- g. Verify contractor is implementing required Storm Water Pollution Plan meeting local, state, and federal laws.
- h. Coordinate all public agency permits, connections, and other related coordination work during the construction phase.
- i. Schedule and conduct the pre-construction meeting with the contractor and all relevant team members. Coordinate a separate hazardous material abatement pre-construction meeting.
- j. Verify contractor is maintaining the record documents on a regular basis. All revisions should be recorded on a single set at the construction site.
- k. Assist the District with moving and storage work that may be required to perform the construction work in the Master Plan. Coordinate and manage work with site staff and District staff to minimize disruptions to the school operations.
- l. Manage the established document controls for RFIs, Submittals, Change Orders, and other project logs and files.
- m. Review shop drawings and submittals for completeness and monitor the status of all submittals, shop drawings, and related correspondence.
- n. Document the progress of construction work with daily reports and digital photos that document project progress, unforeseen conditions, and non-compliant work.
- o. Coordinate and lead all weekly construction meeting.
- p. Ensure contractors meet all Division 00 and 01 contract requirements.
- q. Manage and oversee the Project Inspector is performing their work per his or her contract requirements.
- r. Prepare monthly reports for all projects that include executive summary of the program and detailed status of each project.
- s. Analyze and review all change orders proposals. Verify scope and accuracy of cost and submit a recommendation to the District.
- t. Evaluate all claims and make recommendations to the District on the most effective way to mitigate and/or resolve.
- u. Review contractor payment applications request and gather required signature for further processing by the District.
- v. Monitor all liens and stop notices and advise the District. Monitor contractor compliance with insurance certificates, endorsements, limits, and other legal documents.
- w. Assist District in issuing and managing small contracts needed to accomplish the work of the larger projects and program.

#### **Post Construction and Project Close Out Services:**

- a. Coordinate with Architect and consultants the development of the punch list into a single document. Monitor and assist in the verification and completion of the punch list work.
- b. Prepare all close out documents needed for DSA, OPSC Funding, County (File Notice of Completion) and permits.
- c. Coordinate submission of all Contractual documentation from the Contractor to the District including Record Drawings, Warranties and Operation and Maintenance Manuals. Review and approve as appropriate.
- d. Coordinate all required close out documents and transmit to the District, including resolution of all project issues, RFIs, PCOs, COs, RFIs, ASI, Project Photos, O&M Manuals, and correspondences. All documents to be submitted in an organized and filed in appropriate boxes. Provide electronic version of all relevant information in a safe and reliable format.
- e. Assist and coordinate the District move into its new facilities including installation of District equipment and furnishings.
- f. **Assist in the implementation of commissioning process of the projects or coordinating the training of the new facilities to District staff and personal.**
- g. Prepare close checklist for DSA and OPSC. Consultant to assist Architect and District that all projects are closed with both OPSC and DSA.

## **Attachment C**

The Consultant shall be paid the following fee:

Insert fee and timing of payment. Payments should correspond to work that has been performed.

Issued to: **Gravenstein Union School District**  
Attention: **David Rose, Superintendent**



**Statement of Qualifications  
and Proposal**  
Construction Management Services  
March 27, 2020



License #407339, Class B









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**Letter of Introduction**

Response to Request for Qualifications (RFQ)  
Project/Construction Management Services

David Rose, Superintendent  
Gravenstein Union School District  
3840 Twig Avenue  
Sebastopol, CA 95472

March 25, 2020

Dear Mr. Rose,

Thank you for the opportunity to share our qualifications with the Gravenstein Union School District. We have studied your RFP and feel we fully understand the needs of your district. We believe our team of professionals are highly experienced in the construction management services requested. We currently work with multiple school districts throughout Sonoma, Mendocino and Marin County. Counterpoint Construction Services, Inc., is well-established with sixteen years in the construction management industry. We are a "hands-on" firm that works diligently to understand each client's philosophy and mindset in order to apply our knowledge to each project.

Counterpoint Construction Services Inc. is staffed with individuals who have unique experience working in the trades and architectural firms, primarily focused in institutional construction, specifically K-12. What sets us apart is our relational approach, conscientious professionalism, and experience in institutional construction combined with our ever-expanding pursuit of knowledge of all aspects of Public Works.

We offer our reply for your review and consideration. You will find our references and reputation to be excellent. We are exceptionally qualified to provide the requested services and I sincerely hope Counterpoint Construction Services, Inc., is selected to collaborate with the Gravenstein Union School District.

Sincerely,  
COUNTERPOINT CONSTRUCTION SERVICES, INC.



Tenaya Dale,  
Vice President Construction Services



# Description of Firm

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*At Counterpoint Construction Services, Inc. we understand the vital importance of open communication and a collaborative approach driven by hard work and striving for excellence.*

■ Counterpoint Construction Services, Inc. (Counterpoint) was established in February of 2004, by Mr. Neil Bohn. Our founding principle is that our clients come first.

Justin Walling began his career with Counterpoint shortly after its creation and became President and CEO in November of 2015. Today, Counterpoint has five full-time employees. We are a smaller firm by choice, believing it takes uniquely skilled individuals to be successful in this industry. Our relative size is a hallmark to our founding belief in maintaining a workforce that shares in our principles to provide our clients with excellent professional service.

Over the past sixteen years, we have focused on a wide variety of K-12 school work. For the Roseland Charter District we managed the building of the new \$16 million Roseland University Preparatory High School. In 2016 we aided the Sonoma Valley Unified School District in the passing and implementation of their \$120 million bond measure. At the Harmony Union School District and Forestville Union School District, we assessed their campuses and created an extensive Five Year Deferred Maintenance plan including cost estimates. Over the last five years we have guided the Healdsburg Unified School District in a full campus modernization including a new Modular STEM building and new all weather track and field with state of the art LED lights. From modernization, to new construction, we help our clients achieve their goals with professionalism and integrity. There is no job too large or small that we won't tackle for our clients.

Our approach to work begins with getting to know the philosophy of our clients and applying that knowledge to their benefit during construction projects. This practice compliments your District and bond program well and fosters a collaborative team. We utilize your philosophy to oversee the work with minimal disruption to the educational process while applying the most cost effective methods. We know that anything that delays an active project cost our clients' money.

## **Ownership/Legal Form**

Justin Walling - President  
California Corporation  
Subchapter S

## **Senior Company Officials**

Justin Walling - President  
Angela Walling - Vice  
President/ Treasurer

## **Contact Information**

3663 N. Laughlin Rd., Ste 200  
Santa Rosa, CA 95403  
www.counterpointcs.com  
707-824-8440

## **Key Contact**

Tenaya Dale  
tdale@counterpointcs.com

## **California Contractor License**

# 407339 Class B  
Issued June 1981  
Expires January 31, 2022



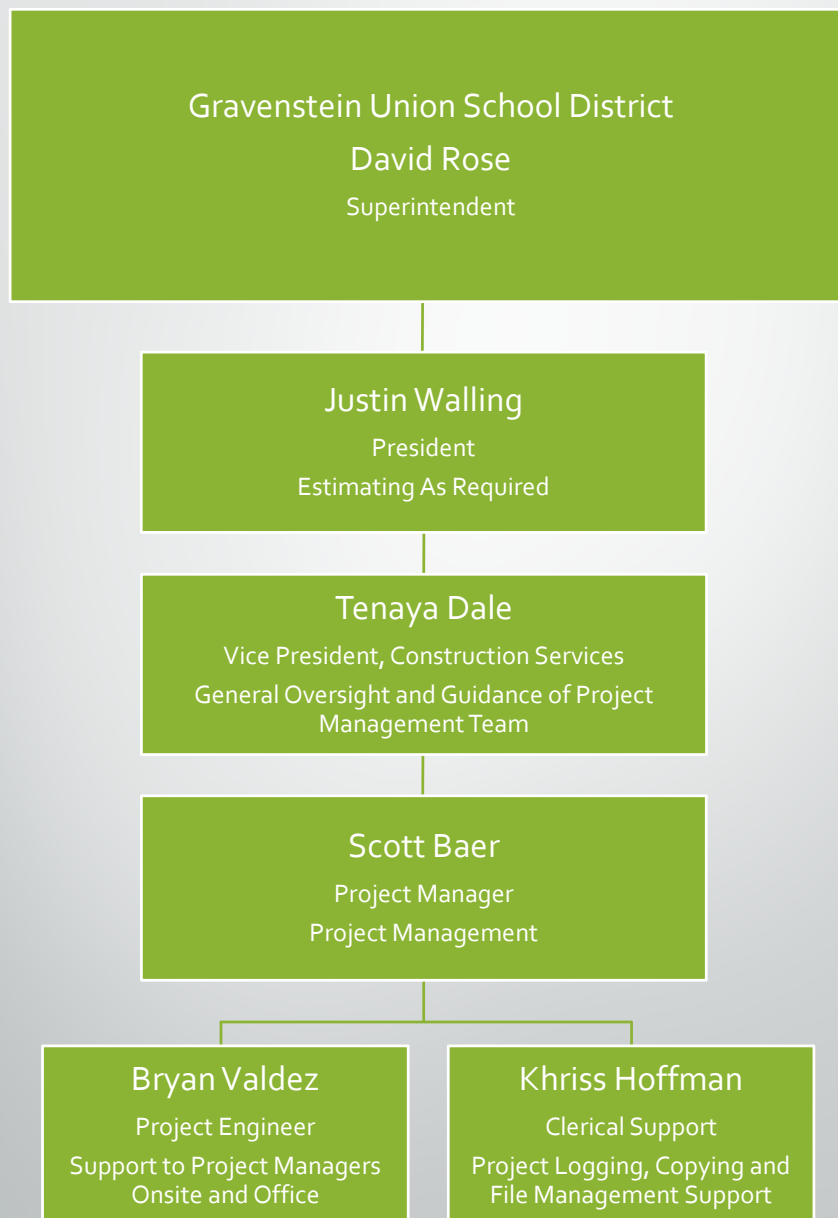


Roseland School District Office

# Project Staff

*Tenaya Dale will be the key contact and have primary oversight of all projects while Scott Baer will serve as the day to day Project Manager. Both will be supported by Bryan Valdez.*

## Organizational Structure



# Project Staff

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Tenaya Dale, Vice President, Construction Services

With Counterpoint since: 2014

**Experience:**

Mrs. Dale has over 25 years' experience in K-12 school construction projects throughout the Bay Area. Her previous experience as Director of Construction Administration at a large architectural firm provides a robust knowledge of all types of K-12 construction. In 2018 Tenaya assumed general oversight of the day-to-day management of all projects under President Justin Walling.

**2014-Present: Counterpoint Construction Service, Inc.**  
**Vice President, Construction Services**

- Construction Management and Owner's Representative including:
  - Healdsburg Unified School District
    - Master Planning for \$67 Million 2016 Bond Initiative and Bond Program Management
    - \$35 Million 2012 Bond Initiative and Bond Program Management
  - Sonoma Valley Unified School District
    - Master Planning for \$120 Million 2016 Bond Initiative and Bond Program Management
    - 5-year Deferred Maintenance Implementation Plan
    - District Wide HVAC Replacement
    - District Wide Data Infrastructure Replacement
    - Various Bond Projects relating to Traffic Flow and Student Access
    - Adele Harrison Middle School Athletic Fields
  - Petaluma City Schools
    - Casa Grande Athletic Facility Renovation

**2001 - 2014: Quattrocchi Kwok Architects**  
**Director of CA Services/Contract Administrator**

- Set Policies and Procedures for Construction Administration Department and oversaw CA staff.
- Concurrently provided CA Services for districts including the following:
- Larkspur Corte Madera School District
  - Re-Construction of the San Clemente School into the new 21<sup>st</sup> Century Cove School.
- Ross School District
  - Complete Multiple-Phased Renovation of Elementary School
  - New Gym
- San Ramon Valley Unified School District
  - Creekside Elementary School – New Campus
  - Live Oak Elementary School – New Campus
  - Gale Ranch Elementary School – New Campus
  - Monte Vista High School – New 3-Story building, Shop Building and Café Renovation.
  - Twin Creeks Elementary – New MPR Building and Renovation of Library and Computer Lab

**1995 - 2001: GV Custom Modular**  
**Project Manager**

# Project Staff

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Scott Baer, Project Manager

With Counterpoint since: 2016

**Experience:**

Mr. Baer brings 19 years' experience to his role as a Project Manager. Scott was a General Contractor for 10 years. Scott also spent 6 years as a Project Superintendent. His responsibilities included managing the day-to-day operations of commercial and residential projects for Private and Public works projects.

**2016-Present: Counterpoint Construction Service, Inc.**

**Project Manager**

- Construction Management and Owner's Representative including:
  - Harmony Union School District
    - Master Planning of \$9.5 Million 2018 Bond Initiative & Bond Program Management
    - 5-year Deferred Maintenance Implementation Plan
    - 2019 DM Summer Project
    - Planning 2020 Middle School Expansion & 2021 New Natural Turf Field
  - Waugh Elementary School District
    - Master Planning of \$4 Million 2016 Bond Initiative & Bond Program Management
    - 5-year Deferred Maintenance Implementation Plan
    - 2017 Summer - Corona Campus Parking Lot, Playground Improvements
    - 2018/2019 Summer - Meadow Campus
    - Planning 2020 Corona Campus Dry Rot Repairs, Painting & Roofing
  - Konocti Unified School District
    - 2019 Summer - Burns Valley Elementary Staff Room Remodel
    - 2019 Summer - Konocti Education Center Walk In Cooler
  - Monte Rio
    - 2019 Summer - Roofing Replacement
    - 2019 Summer - Flooring Replacement at Gym, Band room and Kitchen

**2010-2016: Kirby Construction Company, Inc.**

**Project Superintendent**

- Project Superintendent for private, public and commercial projects
- Schedule Consultation
- Estimating

**2000-2010: Baer Construction**

**Owner**

- Residential & Commercial (New & Remodel)
- Winery remodels/ Wine care construction



# Project Staff

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Bryan Valdez, Project Engineer

With Counterpoint since: 2017

**Experience:**

Mr. Valdez became part of the CCS team as a Project Engineer in 2017. His attention to detail and excellent communication skills have allowed him to quickly assimilate to the construction industry which has led to tremendous growth while as CCS. Bryan provides quality detailed support to our Project Managers and clients.

**2017-Present: Counterpoint Construction Service, Inc.**

**Project Engineer**

Provide support to Project Managers for a variety of tasks including:

- New project coordination and start up
- Assist with advertising and consultant/contractor solicitations
- Assist in preparation of procurement documents
- Assist with construction meetings and minutes
- Maintain project logs & budgets
- Assist in coordination of vendor/consultant activities
- Onsite observations
- Follow up as requested by the Project Managers
- Assist Project Managers for the following Districts
  - Sonoma Valley Unified School District
  - Roseland School District
  - Healdsburg Unified School District
  - Waugh Elementary School District
  - Harmony Union School District
  - Monte Rio School District

**2017-Prior:** Food Service Industry with various positions held from server to floor supervisor.



Casa Grand High School Field Renovation



Sonoma Valley Unified District Wide  
Roof and HVAC Replacement



# Consultant

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If required for complicated or forensic scheduling Counterpoint plans to use Hakan Kiliccote with Lombardia Consulting.

*Hakan Kiliccote, Principal*

*187 Avila St.*

*San Francisco, California 94123*

*(415) 225-6358*

*hakan@lombardiaconsulting.com*

**Education:**

Master of Science – Construction Management, Stanford University, Stanford, California.  
Coursework emphasis on techniques of project planning and control, construction financial issues and claims, and legal context of construction. Graduated with 3.95/4.00 GPA.

**Experience:**

Managed project scheduling for projects from \$1 million to over \$1 billion, for contractors, project owners, and construction managers.

Performed scheduling seminars and training for project management professionals and students.

From 1996 to 2005, worked for AMEC Construction Management as scheduling manager.

Experienced in Primavera P6, Primavera P3, Primavera SureTrak, Microsoft Project, vPlanner, and VICO Control scheduling platforms.

**Recent projects include:**

04/13 – 9/14 : Marin Primary School Renovations / Sitework, Larkspur, CA  
08/14 – 06/19 : St Lukes Hospital Tower Construction, San Francisco, CA  
01/15 – 07/18 : New Office Campus Construction, Confidential Client, Cupertino, CA  
05/16 – Current : New Office Campus Construction, Confidential Client, Menlo Park, CA  
05/16 – 18/01 : San Jose City College PE Building and Wellness Center, San Jose, CA  
11/16 – 12/18 : Four Seasons Hotel Construction, Calistoga, CA  
11/16 – 10/18 : Portsmouth Parking Garage Remodel / Upgrades, San Francisco, CA  
12/16 – Current : New Office Campus Construction, Confidential Client, Mountain View, CA  
17/01 – Current : Foothill College New District Offices Project, Los Altos, CA  
17/03 – Current : San Francisco Fire Station #5 Construction, San Francisco, CA  
17/06 – Current : San Mateo Fire Station #52 / 57 Construction, San Mateo, CA  
17/06 – 18/05 : Will C Wood Stadium Construction, Vacaville, CA  
17/09 – 18/11 : Napa Courthouse Construction, Napa CA  
17/11 – Current : UCS Precision Cancer Medicine Building, San Francisco, CA  
18/02 – Current : Public Safety Center Construction, San Mateo, CA  
18/07 – Current : New UCSF Parnassus Hospital Preconstruction Planning, San Francisco, CA  
18/08 – Current : SF General Research and Academic Building (RAB), San Francisco, CA



# Consultant

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## **Forensic Schedule Analysis :**

Party represented is underlined in the list below:

- Housing Authority of Alameda vs Fine Line Construction – Alameda Housing Project
- SF Care vs Disegno Arch. – SF Care Residential Senior Center
- AMEC vs 246 2nd Street Condominiums – 246 2nd Street Residential Tower
- City of Milpitas vs Turner / Studios Architecture – Milpitas City Hall
- South Bay Construction vs Church of the Nazarene – San Jose First Church
- Mountain States Steel vs West Bay Builders – San Francisco Bay Bridge W2 Pier
- R&W Concrete vs West Bay Builders – San Francisco Bay Bridge W2 Pier
- City of Stockton vs A/E Team – Stockton Arena
- AMEC vs Chabot Space Center POA – Chabot Observatory
- AMEC vs UC Riverside – Riverside Fine Arts Center
- AMEC vs UC Berkeley – Harmon Gymnasium
- Shepherd Construction vs Mount Diablo School District – Delta View Elementary School
- Fremont Union School Dist vs BFGC Architects – Monte Vista High School
- Rainbow Construction vs Ukiah School District – Grade Hudson Elementary School
- Golden Gate Bridge District vs TY Lin / Imbsen Associates – Golden Gate Bridge Retrofit
- Granite Construction vs Carter Burgess – Las Vegas Monorail Construction
- Bay Ship Steel vs Deems Lewis McKinley – Newark Mem. HS Tech Center Addition / Commons
- Centinela Valley High School District vs FH Paschen – Centinela Valley Cafeteria
- West Contra Costa Unified School District vs RDS Architects – Hercules Middle/High School
- E.W. Thorpe vs. BACA - Airport Executive Center, Livermore, CA
- City of San Mateo vs. Pacific Mechanical Contractors – San Mateo Sewage Treatment Plant, San Mateo, CA
- Mission Meridian Village vs. Moule & Polyzoides Architects & Gangi Builders – Mission Meridian Village, South Pasadena, CA
- Grossmont Healthcare District vs. The Design Partnership – Grossmont Hospital Construction, La Mesa, CA
- San Diego County vs. A+A/Carrier Johnson – Edgemoor Skilled Nursing Facility, San Diego, CA
- UC Old Adobe vs. Stantec – UC Old Adobe Medical Center Construction, Sacramento, CA
- West Contra Costa Unified School District vs. West Bay Builders, King Elementary School Expansion, Richmond, CA
- Road and Roof Construction vs. ECCL, Law Enforcement Compound, Kabul, Afghanistan
- Road and Roof Construction vs. ECCL, Sensitive Investigation Unit and Air-Mech-Strike Unit, Kunduz
- Daly Partners vs Proforma Construction, Juniper Lofts Residential Complex Construction, Oakland, CA



Hidden Valley Elementary School Modular Classrooms





Healdsburg High School Campus Modernization



# Project Methodology

*Counterpoint Construction Services, Inc. is highly adept at scheduling, budgeting, cost estimating, and document control. The following sections describe the methodology of our services and capabilities.*

We employ highly motivated and qualified staff who share our unique view of our work product and who strive to create longstanding relationships built on trust. Our unique approach to understand each client's philosophy and mindset enables us to perform at a higher level for our clients. Our staff is a mixture of lifelong construction field personnel, combined with staff members who have backgrounds in large architectural firms. This blend of experience allows us to better understand each project from both design and construction perspective, while keeping the focus on our clients' goals. This level of understanding, we believe, allows us to be qualified to represent each Districts' unique characteristics.

Our approach to each project begins at the early stages, working with all appropriate stakeholders, whether it is the Superintendent, CBO and Director of Maintenance or Site Principals. Once we understand the unique perspective or goal that each may bring to the project, we are better able to apply that knowledge, along with previously established budget and/ or schedule goals, to deliver a successful project. For example, understanding the programmatic issues at a given campus, we are better able to align a given project to suit that specific program's needs with minimal disruption to the educational process.

During these early stages of project and scope development, we utilize tools such as our pre-construction checklist to forecast and anticipate challenges or unique situations that may arise. The list covers everything from utility connections and tie-ins to CDE and OPSC applications (if applicable). We apply the same thoroughness when completing the projects leaving no issue incomplete and ensuring final DSA close-out is achieved.



Roseland School District Office





Kent Middle School

# Project Methodology

Listed below are services provided by Counterpoint. This list is further expanded upon on the following pages

<u>Planning/ Pre-Design</u>	<u>Design</u>	<u>Bid/Award</u>	<u>Construction</u>	<u>Post Construction/ Close-Out</u>
<ul style="list-style-type: none"><li>• Program Planning</li><li>• Facilities Assessments</li><li>• Master Planning</li><li>• Implementation Plans</li><li>• Deferred Maintenance Plans</li><li>• Site Selection</li><li>• CEQA Planning</li><li>• Public/Board Outreach</li><li>• Consultant Selection</li><li>• Alternative Funding</li><li>• Pre-Construction Check-List</li><li>• Budgeting</li><li>• Project Delivery Method</li><li>• Scheduling</li></ul>	<ul style="list-style-type: none"><li>• Architect Coordination</li><li>• Programming Meetings</li><li>• Design Reviews</li><li>• Board Presentations</li><li>• Local Agency Coordination</li><li>• Site Coordination &amp; Moving</li><li>• District Standards</li><li>• Constructability Review</li><li>• Cost Estimating</li><li>• Value Engineering</li><li>• Outside Consultant Coordination</li><li>• Front-End Specifications</li><li>• Furniture &amp; Equipment Procurement</li><li>• Moving</li></ul>	<ul style="list-style-type: none"><li>• Noticing</li><li>• Pre-Qualification</li><li>• Bid Documents Distribution &amp; Document Control</li><li>• Advertisement</li><li>• Contractor Selection for LLB or Design Build</li><li>• Pre-Bid Conferences and Legal Conformance</li><li>• Addenda</li><li>• Receive Bids, Evaluations and Recommendations</li><li>• Contract Preparation</li><li>• Special Testing &amp; Inspection Agency Selections</li></ul>	<ul style="list-style-type: none"><li>• Noticing</li><li>• Pre-Construction Meetings and Expectations</li><li>• Outside Utility and Agency Coordination</li><li>• Observations and Meetings</li><li>• Document Control</li><li>• Schedule Oversight</li><li>• Budget Control and Oversight</li><li>• Change Order Review</li><li>• Claim Avoidance/Resolution</li><li>• Payment Applications and Invoice Review</li><li>• Board/Site Communication</li></ul>	<ul style="list-style-type: none"><li>• Punch List Coordination &amp; Corrective &amp; Warranty Work</li><li>• Final Move-in Coordination</li><li>• Coordinate required close out documents</li><li>• Final Notice of Completion Filing</li><li>• Confirm O&amp;M &amp; Record Drawing Submissions</li><li>• Final Project Accounting</li></ul>



# Project Methodology

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## ■ Client Representation:

Our goal is to understand your Districts values and ensure that those values are implemented at each step of the program. From the very first meeting, no matter where in the process we are hired, it is our intent to have a clear direction for the needs of our clients. This starts with understanding the intent and limitations of your District. Below are the services that, as required, can be part of our partnership representing you as our Client.

## ■ Planning and Pre-Design Phase Services:

- **Program Planning** - There are several things to consider when forming a program for your District. Is there a current Deferred Maintenance Plan? When were the last set of upgrades made to your sites? What are the important “warm, safe and dry” components you are already aware of that require attention? What are your educational program goals? Are there stakeholder concerns that need to be addressed? All these components need to be considered when formulating a program and prioritizing available funds. Counterpoint can guide the District in preparing this program outline.
- **Facilities Assessments & Deferred Maintenance Plans** - One of the first steps of assessing your needs when working to design your program is performing a facilities need assessment while collaborating with your maintenance department to identify the most critical ADA, Fire/ Life Safety priorities. This will include reviewing your facility using Williams Settlement format for deferred maintenance and repair items and include common sense review. We will look at major areas of concern including accessibility concerns, building envelope failures and major building systems for failures. We take into consideration your AHERA reports and can also help obtain Roofing Assessment Management Plan (RAMP) Report. Counterpoint then assembles a report for each campus that includes scope and quantity of work, as well as estimated cost in today's dollars. Following this assessment, we can provide a proposed five-year plan for construction/ maintenance/repairs discovered during the investigation.
- **Master Planning** - An essential component to providing all students with safe and educationally supportive learning environments as required by California Department of Education (CDE) is that school districts have a Facilities Master Plan (FMP) and that they are kept updated with local community input. Having an updated FMP is also required any time that an application for grants or matching funds is submitted. A FMP is viewed as the long range plan for the district including enrollment predictions and educational plan and how they affect each campus in your district. While large parts of the FMP are provided by a design professional, there are other aspects required for the long range plan including demographic studies and enrollment projections. We are prepared to help coordinate this with your design professional or your in-house staff. This includes coordinating meetings with stakeholders, community partners and even the Board of Education. Creating this road map for your district will ensure that informed decisions are made when planning individual projects. The final step is working with your team and Board to review and approve the implementation plan.
- **Site Selection** - If your program requires, Counterpoint is qualified to assist the District in site selection process and evaluate the impacts that site selection requires.

# Project Methodology

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- **CEQA Planning** - Districts are as lead agencies required to assess every project (no matter what size) to identify the significant environmental impacts of their actions and to avoid or mitigate those impacts, if feasible. Counterpoint can assist the District in this process. We collaborate with District legal counsel in preparing a Categorical Exemption if this is the appropriate action. If further review such as a Initial Study/Mitigated Negative Declaration (ISMND) or full Environmental Impact Report (EIR) is required, we assist the district in selection of the environmental consultant, and guide the process alongside them. This includes public meetings, schedules, and helping gather the information required on the District's behalf. This can be a daunting process and our goal is to make sure that it is done correctly to minimize the District's exposure to opposition or litigation. During the construction process, we help ensure that mitigation measures are followed.
- **Public Input and Board Outreach** - Throughout the program, Counterpoint will assist to the level required in setting up and leading public input meetings and Board sessions. We can provide handouts and presentations alongside, or as requested by any District staff or consultants. Clear communication is key to ensure that all stakeholders are heard, kept in the loop and that their needs are met. We can also provide assistance with reporting to your Oversight Committees.
- **Consultant Selection & Contracts** - As your program progresses, Counterpoint is comfortable working with District legal counsel to solicit through a fair, competitive process and assist the District in drafting and executing agreements as required.
- **Alternative Funding Options** - It can be necessary to apply for matching funds if the District cannot fully fund the work. Counterpoint is experienced in assisting with this and strives to be mindful of alternate funding through any grants from state or local agencies. Depending on the project, there may be several methods of funding. For instance, some Career Technical Education projects can apply for both CTIG and OPSC matching funds. Ultimately our goal is to have your known funding go as far as possible and leveraging grants makes that possible.
- **Pre-Construction Checklist** - Each project has unique requirements. To try and anticipate potential issues and prepare budgeting, we start with the checklist and assign place holders for each item that may potentially be needed. This includes state and local fees that will be assessed during the different phases of the project. Not only does this help create realistic budgets, but helps minimize areas of risk by verifying areas of utilities and possible unknown conditions that could slow construction and create costly change orders later in the process. We feel strongly that identifying as many potential obstacles during pre-construction allows for the project to meet the anticipated budget and scheduled goals. This includes acquiring HAZMAT Surveys, subterranean utility surveys, soils reports, title reports and any other necessary items that will assist in the design and help avoid unforeseen conditions.
- **Budgeting** - Utilizing early estimates and the pre-construction checklist we can then create a comprehensive realistic budget detailed with hard costs, soft costs, contingencies and escalation. We have extensive budgeting experience on a wide array of projects. Our relationships with a variable assortment of resources in the construction industry allows us to update our budgets to reflect current construction industry trends. Depending on the size and complexity of the District program we utilize a multitude of technology and systems to create



# Project Methodology

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budgets and estimates. Project budgeting for all hard and soft costs are typically managed in a cloud based program called Procore, which can be exported into PDF or Excel at any time for project record. The budget is a living document that is continually updated providing a record of how the project dollars are spent. The District can view this information online as well any time. Full and complete files will be provided at the close of each phase/project.

- **Project Delivery Method** - Counterpoint utilizes many construction delivery methods. Evaluation of what delivery method best fits for a project is based on the complexity of the project, the estimate, time frame and funding source. We will review each project individually to help the District decide if CUPCCAA, Design/Bid/Build, Design/Build, Multi-prime or Lease/Leaseback is the right method for that scope of work.
- **Schedule** – Our many years of practical construction knowledge has led us to become skilled in schedule creation, review and analysis. We believe that these skills are essential to the success of any project and a key component to mitigating potential project claims. Setting realistic time lines for each phase of the project is key to helping manage expectations for not only the stakeholders, but the public and your board. Managing the schedule begins at the start of the program and monitoring each phase through project completion.

## ■ Design Phase Services:

Our preference is to be involved with a project before the design starts, when the master planning is done or when a specific project budget is set and the Architect/Engineer is hired. This provides the whole picture of the project and history on why decisions were made, which allows us to provide quality control. Regardless of when we enter the project, we believe it is our job to ensure that the District gets what they envisioned on time and on budget, while also respecting the creativity of the design professional.

- **Architect Coordination** – We firmly believe that the relationship between CM and Architect should be a parallel relationship of harmony, focusing on one singular goal; the satisfaction of our mutual client. We realize and understand that our role as the District representative means that we must achieve fair, yet firm representation in our client's best interest. Timely submission of the project to the authority having jurisdiction, in most cases DSA, can make or break a project schedule. Having regular meetings and deadlines helps to ensure that occurs. Architect coordination and oversight carries through all subsequent phases of the project closely monitoring responses to RFIs and Change Orders ensuring timely and accurate responses are given.
- **Programming Meetings** – Counterpoint will coordinate with the project schedule timely programming meetings to ensure that all users will have the ability to provide necessary input.
- **Design Review** – We will, during all 3 phases of construction documents perform high level design review to ensure that the project scope is maintained and that scope creep does not occur. While projects tend to change as the design develops, it is our job to keep the overall project budget and schedule on track.

# Project Methodology

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- **Board Presentations** - At certain phases of the project, we suggest that not only are the stakeholders being kept up to speed, but that the Board is informed and adequately involved. This will be at the Districts request or along side District staff.
- **Local Agency Coordination** - Agencies that are identified in our pre-construction check-list may require owner coordination. This is a place we can act as the owners agent by assisting with permit applications or soliciting local fire authority signature as required for DSA submittal.
- **Site Coordination & Moving** - We will review the necessary relocation/moving of site materials and/or buildings and ensure all parts of this are included in either the construction documents, or a separate contract. Packing and moving can be an invasive process for staff, therefore, clear communication is necessary. We have attended staff meetings to explain the project and discuss how the project will affect the staff and students. During these meetings we collaborate on how to minimize the impacts. Another step that often gets overlooked is working with any non-district related programs on site that need to be notified and potentially relocated. Bringing this up before construction starts allows for minimal impact of those programs.
- **District Standards** - We understand how important it is to your maintenance department that district standards are followed during design. This is required to simplify stocked materials and keep consistency in the employees work-flow when maintaining your facilities. We will work with the Design Team to make sure that your standards are maintained.
- **Constructability Review** - Counterpoint can perform constructability review in addition to high level design review. This review of the documents helps verify that not only is the design intent being met, but that it's buildable.
- **Cost Estimating** - We are well versed in a wide variety of cost estimating projects ranging from the small projects to a \$65 million dollar SRJC Petaluma Campus expansion, in three phases (SD/DD & CD). We currently also provide estimating services for a variety of local Architects. Our estimating services have proven accurate from the very basic conceptual design all the way through DSA submission/approval documents.
- **Value Engineering** - Sometimes costs need to be cut. Counterpoint has been successful with, during all phases of construction, identifying ways to trim the cost of a project while still maintaining the project intent. This can include changing of materials or methods to even recommending modular construction that could save cost with offsite fabrication to cut the budget where needed. We recently were able to bring a project that was 60% over budget by working with the Lease/Leaseback contractor to value engineer the project to within budget while making major cost revisions but minimally changing the student experience of this project. Our experience in the industry allows us to asses where scope can be manipulated to bring them back into budget. In this quickly changing bidding environment having these skills is critical to moving projects forward.

# Project Methodology

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- **Outside Consultant Coordination** - Districts can have special consultants that, for instance, work with their technology systems, or security systems. These consultants are not part of the Design Teams scope, but require coordination. Counterpoint will ensure that all parties are included in the design and execution of completing these systems to District standards. We have worked with multiple consultants to provide full District cabling replacement projects that required working a security consultant, clock-bell-intercom-telephone team and District IT consultants for the wireless routing.
- **Front End Specifications** - Counterpoint will work with District legal counsel to ensure that the standard contract and conditions of the contract, Division 00 and Division 01, are utilized across all projects to set standards for contract management.
- **Furniture & Equipment Procurement** - We can assist in coordinating outside furniture and equipment procurement for items not part of the general contractor's scope. This may include meeting with site staff and outside consultants. We have gone so far as to undertake complete district wide furniture replacement projects which included moving and disposing of surplus furniture not relocated to other sites or Districts.

## ■ Bid and Award Phase Services:

Our services and strategy for this phase include two major emphasis. One is complete and timely responses, prior to the bid, so that the District's bid date proceeds as scheduled. To that end, we focus on assisting the Architect with timely responses to pre-bid questions. Maintaining proper (written) levels of communication with prospective bidders is key. This includes identifying the last date Addenda may be issued without postponing the bid date. The second emphasis is bid strategy which starts in the planning phase. This allows for optimal bid window at particular times of the year to lower cost and boost contractor interest.

- **Noticing** - Counterpoint will assist in publicly noticing the projects for traditional low-bid or Lease/Leaseback contractor selection. We are also familiar with the specialized requirements for CUPCCAA noticing as well.
- **Pre-Qualification** - Whether it's required due to your funding source, your delivery method or as a District optional pre-qualification, we understand what is required. We will work with District legal counsel to assure that the right method and publication requirements are met. We can then review and assist in the grading process providing the owner with the findings.
- **Bid Document Distribution** - We can either completely handle or assist the design team with bid document distribution. Ensuring that no partial sets are released to create miss information during your bid period is critical.
- **Contractor Selection for LLB or Design Build** - We understand the public scrutiny on these delivery methods. Therefore, it's crucial to follow the law on the steps for these alternative delivery methods. Counterpoint will work with District legal counsel to ensure their interpretations on the recent changes to this bid climate are met and documented.

# Project Methodology

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- **Addenda** - As stated previously, we will ensure that either the design team or Counterpoint is properly issuing addenda within legal and adequate time frames.
- **Receiving Bids, Evaluations and Recommendations** - We will be present and manage every public bid process which involves the District in accordance with the public bidding requirements. In those rare instances we will manage (along with District legal counsel) any and all bid irregularities, bid protests or postponements. Once the bids are received, we will perform license and DIR registration checks and work with District legal counsel to verify responsive, responsible bids. If interviews are required, Counterpoint will assist and in all cases provide a final recommendation to the District to take to the Board.
- **Contract Preparation** - Counterpoint will assist or provide all formatted contracts and Notice of Award to be executed once Board approval has been received. Having these ready before Board award allows for the expedited start of construction. It is also during this time that it is imperative to provide the required notification to the Department of Industrial Relations (DIR) for contractor prevailing wage reporting. We can guide the District through this, especially when funding requirements have certain time-frames.
- **Special Testing and Inspection Agency Selection** - Solicitation of all necessary testing and inspection consultants will occur during this phase after final DSA approval. Counterpoint can provide this solicitation and agreement execution for the District.

## ■ Construction Phase Services:

Our methodology and philosophy for providing CM Services is quite simple. We provide the general oversight of all parties to ensure that members of the team are moving the project forward in a clear and swift manner. Counterpoint ensures the design team, contractors, inspection team, DSA and any district members have what they need to provide the work. Essentially, we're the hub of the wheel keeping the spokes in line to roll down the road. To keep each part of the team informed we communicate with our client's team openly and often. This helps move topics forward and fosters an atmosphere that we all are here to accomplish the same goal, while also holding each party accountable.

- **Noticing** - Following the execution of the Contract, the construction phase officially starts with the Notice to Proceed. We ensure that this document is properly issued to tie the contractor to a completion date and starts the project calendar. We will also ensure that the DSA inspector provides the official project start up paperwork with DSA as required.
- **Pre-Construction Meeting & Expectations** - This meeting is important to set expectations onsite as well as how the contract will be administered. Counterpoint will ensure that topics such as hours of work and neighborhood concerns are discussed. Adherence to CEQA mitigation measures will be discussed, as well as District use of facilities while the project occurs. This will also be where the expectations for all construction documents will be set to ensure smooth project communication.

# Project Methodology

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- **Outside Utility and Agency Coordination** - If these are required, we will help coordinate this with the design team, the District and the Contractor.
- **Observations and Meetings** - Counterpoint will retain an onsite presence to ensure progress is occurring on schedule and within budget requirements. Our management staff is uniquely qualified to understand contractor issues and to translate those issues into success for all parties. It is because of our field experience we are able to recognize issues that may slow the contractor productivity equating to increased project cost. We will ensure that during progress meetings issues are not left unattended and thus delaying and increasing cost to the District. It is common for our members to provide direction on topics as needed in order to not cause a delay. These site visits, along with regular meetings, are a vital part of answering the questions needed to continue work. If we don't have that answer, we know who to chase down in order to get it.
- **Document Control** – A key component to any project is document control. Counterpoint maintains a full and complete parallel file on our sever. That is why we are involved in the distribution of all project documentation including but not limited to:
  - *Requests for Information (RFI)*
  - *Architect's Supplemental Instructions (ASI)*
  - *Requests for Proposals (RFP)*
  - *Submittals*
  - *Substitution Requests*
  - *Change Orders*
  - *Schedule Updates*
  - *Applications for Payment*
  - *Photos*
  - *Testing and Inspection DSA documents*

We make the effort to understand each question and directive that is issued and will provide input or guidance as necessary. This allows us to ensure all issues are fully closed and documented and will be turned over to the owner electronically at the end of the project.

- **Schedule and Budget Oversight** - As previously stated we maintain oversight and a continual review of the schedule and budget. Construction hard costs as well as soft costs are updated monthly in our cloud based software and can be viewed or provided upon request. These can be used to update not only the District personnel, but the Board as well. This leads to no surprises at the end of the project. We prefer to review all invoices and direct costs to the project and how they affect the overall budget.
- **Change Order Review** – Always the source for much debate, project change orders will occur. Our approach is simple; we review every change order to ensure that it complies with the contract documents and is fairly priced. If a submitted request matches this criteria, it is recommended for approval. We feel change orders should only be approved for those items which are not quantifiable at bid time. Our years of construction experience and on-going relationships with various contractors, vendors and suppliers, keeps us up to date on current industry pricing trends which is a valuable asset to our clients.

# Project Methodology

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- **Claims, Avoidance & Mitigation** – The best way to mitigate a claim is to keep any dispute from getting to the point of a claim being filed. Should a disputes arise, our approach is to research the facts of the issue thoroughly and resolve them in a prompt and professional manner. The simple practice of accurate record keeping (change orders, project schedule) can reduce the risk of project disputes. We work closely with both contractors and our clients to understand, communicate and resolve all project claims. We believe that in this process there are guidelines, (the contract and the contract documents) that stipulate what is required of each party. Both provide essential guidance for how claims are to be handled. When all parties understand this, claims can be avoided and/or mitigated.
- **Monthly Updates and Board Reports** - Throughout the program and the project we can provide monthly updates, and provide Board updates. Depending on the amount of work ongoing we have implemented bi-weekly updates with District staff and then quarterly updates to the Board. The bottom line is whatever is necessary for project communication and transparency, we will support the District with those needs.

■ **Post Construction, Occupancy and Project Closeout** - We are familiar with the DSA closeout process and what is required to obtain DSA certification of your project. For us the closeout process begins the instant a project starts. Record keeping along the way ensures that when the project is done and meetings cease, that all the documents required have already been collected and achieving close-out is possible.

- **Punch List Coordination and Corrective Work** - Counterpoint will ensure that timely punch list documentation and completion is achieved. Once the punch list is issued, we will not consider it completed until every item has been signed off. This may entail holding appropriate funds from pay applications, weekly notifications or 48-hour notices.
- **Final Move-In** - Communication with site staff is vital to coordinate moving the occupants into the completed project. We will communicate and work with moving consultants if required. Coordinating this work with the final phases of the construction schedules is a task we start mid construction to create a smooth process.
- **Final Completion** - When appropriate, we will assist in recommending to the Board the Notice of Completion and ensure it gets filed with the local agency and distributed appropriately.
- **Operation and Maintenance Manuals** - Working with the Contractor and the Architect, Counterpoint will ensure that the District receives the necessary O&M Manuals and record drawings.
- **Final Project Accounting** - Upon verification that all consultants and direct costs have been paid, we will provide the District with the final accounting and budget update for the project record. At this time, we also deliver the project documents and records.



# Project Methodology

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■ **Technology and Software** – Quick, accurate delivery of information is key to any successful project. That is why we employ the latest project technology and software. Our managers are fully integrated with laptops and smart phones, making us reachable virtually anywhere, anytime. We also utilize cloud based project software to create, transmit and track the dissemination of all project information.

■ **Sustainability** – Counterpoint managers have had years of “green building” experience. It’s not only the right thing to do, but it’s required by the California Building Code and California Energy Commission. Our CHPS experience started with one the of first Collaborative High Performance Schools (CHPS) campuses in California, Kenilworth Junior High School, in Petaluma. Our LEED facility experience began with the renovation and construction of the Novato City Hall, in Novato.

In addition, our project managers’ green building experience includes high efficiency air to air heat exchange, HVAC systems, solar power arrays, daylight harvesting, lighting control as well as native plant landscape projects. We understand that part of designing 21st Century Schools includes not only building high performance learning spaces with light, sound, air and connection to nature, but create flexible and adaptable learning environments. These types of facilities support good learning and quality education.



Healdsburg High School Track and Field

# Agency Experience

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■ **Regulatory Agencies and School Experience** – As described in our general experience section and with the numerous years as construction managers in school construction, we have had many interactions with various public agencies. We have become experts in helping district's, contractors and architects understand and successfully navigate these processes. We have developed long standing working relationships with the various agencies listed below. We believe that our success in dealing with these various agencies comes from perseverance, dedication and an acknowledgment of the guidelines they have established for the areas which they regulate.

When applying for funding Counterpoint will assist in all required documentation, clearly demonstrating the project, and providing information properly to be filed with agencies as CDE, OPSC and the SAB. Timing on this can be critical and once approved, there are many requirements to document per the grant agreement. Not providing this information in a careful manor can jeopardize the grant funds, and even require returning funds. Some of the Districts that we work with cannot pass large bonds, and rely on these grants to provide the facilities they need. We work with them every step of the way on new construction, modernization and even specialized CTE competitive grants.

During the plan approval process, the District has areas of responsibility to provide assistance with items like CGS approval of soils reports which is necessary before DSA submission. Counterpoint regularly assist with this process. We can help with DTSC and CEQA noticing and submission along side any consultants required.

During construction we remind and assist the District to make sure proper notification to DIR for certified payroll monitoring is made and that all SWPPP requirements are followed.

We have routinely worked and interacted with the following agencies or programs:

- Division of the State Architect (DSA)
- State Fire Marshall and Local Fire Agencies
- Office of Public School Construction (OPSC)
- California Department of Education (CDE)
- State Allocation Board (SAB)
- California Geological Survey (CGS)
- Department of Industrial Regulations (DIR)
- Storm Water Pollution Prevention Planning (SWPPP)
- Department of Toxic Substance Control (DTSC)
- Bay Area Air Quality Management District (BAAQMD)
- California Environmental Quality Act (CEQA)
- State Clearing House
- PG&E
- Department of Fish and Wildlife
- California Energy Commission (CEC)
- Leadership in Energy and Environmental Design (LEED)
- Collaborative High Performance Schools (CHPS)





Bacich Elementary School Modernization



# Experience

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*Counterpoint Construction Services, Inc. is highly qualified to provide Bond and Program/Project Management services as proven by our experience.*

To support the district needs, we foster an environment of team work for both our clients and the contractor. We understand that when one or both of these parties is harmed, the project suffers. Having staff members with a contracting background, gives us the unique perspective of “having been there” and we are able to understand the many challenges faced by today’s contractors. Coupled with our history of continued agency management, we are often able to apply both perspectives to resolve issues expediently, which allows for continued progress on a project.



Roseland Creek Elementary School

Another factor in our continued success is quite frankly “we love what we do”. All of our staff members have been selected specifically because they share the same enthusiasm and passion for their work. People with a passion for what they do yield tremendous results. Our firm is highly qualified to perform Construction Management duties for the Gravenstein Union School District. Our history has been focused on K-12 educational projects. We are versed in the ever changing spectrum of construction projects under the jurisdiction of the Division of the State Architect (DSA). Our recent experience includes providing similar services for bond program and construction management to various districts. Along side our clients, we have assisted in the completion of numerous projects including the largest summer work volumes these Districts have undertaken in many years. The following examples demonstrate how regardless of the client needs, we endeavor to provide meaningful management of their program fitting their individual needs.

# Experience

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## ■ Healdsburg Unified School District Chris Vanden Heuvel - Superintendent (707) 431-3488

**2012 Bond Measure E (\$35M):** In August of 2013 Counterpoint was hired and continues to provide construction management services at Healdsburg Unified School District for completion of work that was passed in a local Secondary District Bond Measure. Large projects included a complete campus modernization at Healdsburg Junior High School with a new seven classroom building, and modernizing Healdsburg High School's Career Technical Education wings including a new custom modular STEM Building. These projects were managed utilizing a Lease/Leaseback delivery method. Post construction when the State passed Prop 51, Counterpoint successfully assisted the District in applying for reimbursement funds from OPSC that will now be used to fund additional District priority projects. The work also included small deferred maintenance projects.

**2016 Bond Measure D (\$67M):** During the modernization of the Career Technical Education wings at the high school campus, the District recognized that additional funds were needed to modernize the rest of their Secondary Campuses. Counterpoint worked with the design team to update their master plans and set a list of prioritized projects. This implementation plan allowed the District to seek a \$67M Bond measure on the 2016 ballot. Counterpoint is over half way through the execution of these projects including renovating the main classroom building, renovation of their all weather track and field including new LED lighting and the construction of a second gym. Projects have been completed within original budgets established by the implementation plan and finished early or on time utilizing a Lease/Leaseback delivery method.

**2016 HHS Campus Roofing and HVAC Replacement (\$9.7M):** Spanning two summers of 2016 and 2017 we worked at Healdsburg High School to fully replace all the roofs and HVAC equipment on their campus. The project included large areas of dry rot repair and complicated building revisions. This project was completed on time and with a final change order credit of (\$204,516).

## ■ Sonoma Valley Unified School District Bruce Abbott - Assistant Superintendent of Business Services (707) 935-4249

**2010 Bond Measure H (\$40M):** During master planning for their campuses, Counterpoint worked with the District to implement an energy savings endeavor installing Photovoltaic (solar panels) on canopies at all ten campuses. This \$12 million three year long project continues to provide the District with energy savings each year. Following this project several deferred maintenance projects, including flooring replacements, exterior campus painting, re-roofing and updating HVAC systems at all campuses was rolled out over a period of five years. Counterpoint led a district wide re-cabling and wireless upgrade project to meet the one-to-one student technology goals. During the last two years of deferred maintenance projects, the District recognized that the current bond measure would not allow them to provide all required upgrades, and proceeded with pursuing another bond measure on the 2016 ballot.

**2016 Bond Measure E (\$120M):** After voter approval of the \$120 million bond, the District re-evaluated the projects in the 2011 master plans and updated accordingly. An implementation plan was created prioritizing projects for all ten campuses to work within the cash flow of the bond sale. Counterpoint has executed the first two years of this implementation plan which has completed almost half of the projects identified. Delivery methods being utilized for these projects range based on size and complexity and includes CUPCAA, traditional Design/Bid/Build and Lease/Leaseback.

# Experience

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**2018 SVUSD Campus Roofing and HVAC Replacement (\$7.94M):** During the summer of 2018 Counterpoint assisted the District in fully replace all the roofs and HVAC equipment on 4 of their campuses. This was the third year competing the total district wide replacement at all their campuses. This phase of the project was completed on time and with a final change order credit of (\$56,776).

## ■ Roseland School District

**Amy Jones-Kerr - Superintendent (707) 545-0102**

**2013 Bond Measure N (\$7M):** In December 2012, our firm was hired and continues to provide construction management services for Roseland School District and Roseland Charter School. This includes a mixture of bond program management as well as non-bond program work. Work includes the acquisition of a new site for their \$16 Million Roseland University Prep High School. We are currently working on the new \$11 Million Roseland Accelerated Middle School. Counterpoint assisted with applying for OPSC priority funding to complete this project and we continue to apply for matching funds for current projects to maximize the district resources. We have also assisted the District with smaller projects such as their Prop 39 Energy Efficiency projects, replacing lighting and HVAC systems and replacement of their natural turf field with a robust drainage system. After the 2017 Northern California fires, Counterpoint assisted the District in emergency campus relocation and is currently working on re-population post necessary repair work.

## ■ Kentfield School District

**Liz Schott - Superintendent (415) 458-5130**

**2015 Bond Measure D (\$30M):** Counterpoint was hired in 2015 to assist Kentfield School District with the execution of their 2015 bond measure. Working closely with the Superintendent and Design Team, Counterpoint has overseen the modernization of both the Elementary School and Middle School campuses. Challenges on these two sites included renovation and new construction while not relocating students to another site. Counterpoint assisted the District in selection of the Lease/Leaseback contractor and has worked with the project team to achieve both the desired budget and project completion goals. The final phase of the modernization opened on time and within budget in September of 2019 with seven new classrooms and a new administration building.

## ■ Harmony Union School District

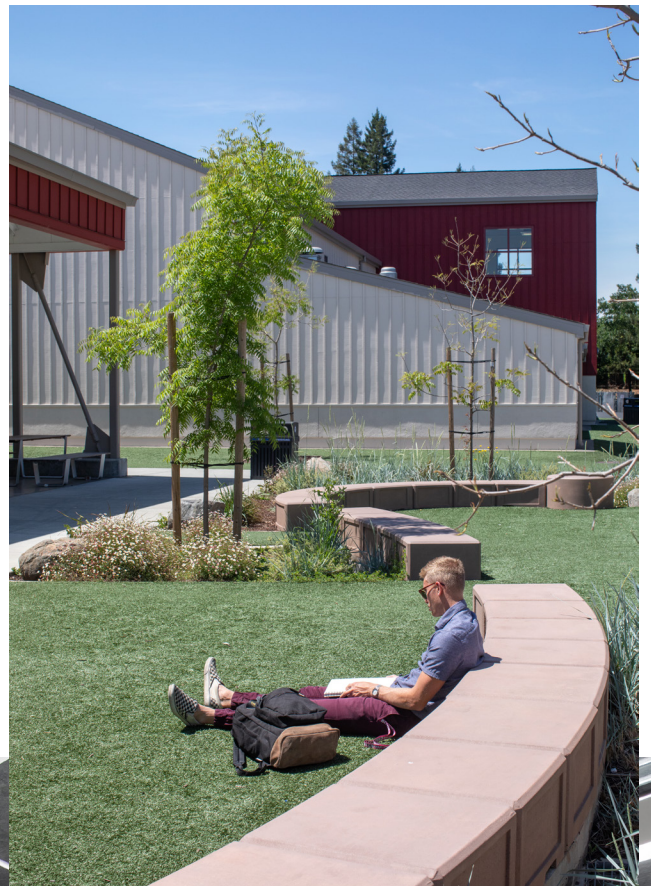
**Stacy Kalember - Business Manager (707) 874-1205**

**2018 Bond Measure C (\$9.6M):** Counterpoint was hired by Harmony in 2017 to assist with creating a deferred maintenance plan as well as provide construction management for other miscellaneous projects. After completing campus assessments for the District, it was identified that a general obligation bond was needed to fund the necessary and desired projects. Counterpoint assisted in creating the bond project list with associated estimates. In November 2018 voters approved Bond Measure C. Counterpoint is currently managing the bond program and in 2019 we aided the District in deployment of their first Lease-Leaseback delivery method RFQ/RFP.



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Healdsburg High Modular STEM Classroom and  
Outdoor Breakout Space





# References

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## **Tenaya Dale Vice President, Construction Services**

### **Chris Vanden Heuvel, Superintendent 707-431-3488**

Healdsburg Unified School District

- Bond Measure E and D (2014 to Present - \$107 Million)
- Healdsburg High School Modernization (2016 - 2018 - \$21M)
- Healdsburg Junior High Modernizations (2014 to 2016 - \$7M)

### **Bruce Abbott, Assistant Superintendent of Business Services 707-935-4249**

Sonoma Valley Unified School District

- Bond Measure H and E, Multiple Projects (2014 to Present - \$160 Million)
- 

## **Scott Baer Project Manager**

### **Mike Gardner, Superintendent 707-765-3331**

Waugh School District

- Bond Measure X (2016 to Present - \$4 Million)
- Meadow Elementary Deferred Maintenance Project (2018-2019 - \$1M)
- Corona Creek Elementary Deferred Maintenance Project (2018-2019 - \$1.5M)

### **Stacy Kalember, Business Manager (707) 874-1205**

Harmony Union School District

- Harmony Elementary School Deferred Maintenance Project (2018-2019 - \$2M)
- Bond Measure C (2018 to Present - \$9.6 Million)



A.E. Kent Middle School Modernization

# Fee Proposal

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March 27, 2020

David Rose  
Gravenstein Union School District

Thank you for allowing Counterpoint Construction Services, Inc. the opportunity to provide you with our fee and rate schedule. We recognize the importance of setting a budget related to the scope of services requested. It is our intent to provide the fee structure in a manner to allow fair yet reasonable fees to cover the work required. We do recognize there may be services that would occur not related to specific project budgets such as assistance with master planning and creating an implementation plan. Those services would be provided as needed on an hourly basis.

Our Proposal includes three groups of phases for each project. These are as follows:

**Pre-Construction and Award Services (Hourly):** Basic services required for planning, administrating, bidding and processing work precedent to the Board award of contract. Depending on the type of project, this can range from straight forward project planning and bidding, to full environmental review and detailed community involvement.

**Construction Services (Percent):** Basic services required measured from the month in which the Board awards the contract for the project and ending at the scheduled completion time. This phase is intended to expire 30 days after contractor's scheduled completion date to allow for standard contract closeout. If the project is delayed beyond this time, due to no fault of the project manager, additional services may be charged at our hourly rates.

**Extended Closeout and Warranty Services (Hourly):** All services required after the end of the scheduled completion date described above.

Phase of Service Summary:

Pre-construction & Award  
Construction Services  
Extended Closeout/Warranty

Basis of Payment:

Hourly  
Percent of Contract Award  
Hourly

**Percent of Contract Award Fee-based Services:**

At the time of award of construction contract, our fee for Construction Services Phase will be established as follows based on Contractor award amount:

Projects less than \$600,000 at time of award: Hourly

Projects between \$600,000 and \$1,500,000 at time of award; 5% of award amount.

Projects between \$1,500,001 and \$9,000,000 at time of award; 4.5% of award amount.

Projects in excess of \$9,000,001 at time of award; 4% of award amount.

# Fee Proposal

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## **Hourly Rates:**

Our hourly rates are as follows:

President:	\$ 170.00 per hour
Vice President:	\$ 155.00 per hour
Sr. Project Manager:	\$ 140.00 per hour
Project Manager:	\$ 120.00 per hour
Project Engineer	\$ 95.00 per hour
Project Clerical:	\$ 65.00 per hour

These rates are assessed based upon actual time of service to the nearest half-hour, including direct driving time.

Hourly rates and Fee-Based proposals are all-inclusive, except as excluded below in “Fee Qualifications”, and except as noted as additional services or as reimbursable costs below. All home-office payrolls, overhead, fuel, vehicle, phone, regular mail, fax, computers and cell phone costs are included in our hourly rates.

## **Fee Qualifications**

The following costs shall be reimbursed at the rate of actual cost plus 10%:

- Blueprinting.
- Claims, cost or scheduling consultants hired with consent of District
- UPS, FedEx or Cal-Overnight Charges
- Schedule reproduction (larger than 8.5 X 11)
- Reproduction and binding for monthly reports
- Bid advertisements
- Authorized expenditures
- Permits, fees, utility company fees

**Hourly or Lump Sum Additional Services** (These services are considered additional services, to be provided if and as agreed between District and Consultant)

- Estimating Services
- Value Engineering
- Preparation of CPM Schedules or As-Built Schedules
- Facility Needs Assessments
- Deferred Maintenance Planning

**The following listed items are excluded from our Fee Proposal:**

- Responsibility for handling, assessment or abatement of hazardous materials or Substances, including black mold, lead or asbestos
- Liability for site contractor’s compliance with safety regulations, or proper payment and reporting of prevailing wages
- Services provided by the Architect or any of the Architect’s sub-consultants or by registered design professionals
- Services provided by the Geotechnical Consultant
- Inspection services provided by the District’s Inspector of Record
- Special testing and inspection services

# Fee Proposal

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## Staffing Plan:

Counterpoint's staffing plan is for all staff listed as part of the project team to have varying involvement in each phase of the scope of work. We are confident that the program and project requirements can be completed with the staff listed for the duration of the program. It is always our intention to most efficiently utilize these team members to provide the best value to the client while ensuring key personnel are always representing the District in the goals associated with the work of the program.

Sincerely,  
COUNTERPOINT CONSTRUCTION SERVICES, INC.,



Vice President, Construction Services  
Tenaya Dale



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# Certificate of Insurance



COUNCON-02

LMACE

## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
3/16/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER License # 0303587 ISU Sander Jacobs Cassayre Insurance Services 3200 Villa Lane Napa, CA 94558	CONTACT NAME: <b>Linda Mace</b>
	PHONE (A/C, No, Ext): <b>(707) 254-4105</b> FAX (A/C, No): E-MAIL ADDRESS: <b>lmace@sanderjacobs.com</b>
INSURED  Counterpoint Construction Services, Inc. 3663 N. Laughlin Rd., Suite 200 Santa Rosa, CA 95403	INSURER(S) AFFORDING COVERAGE      NAIC #
	INSURER A : <b>Colony Insurance Company</b> <b>39993</b>
	INSURER B : <b>Ohio Security Ins. Co.</b> <b>24082</b>
	INSURER C : <b>National Union Fire Ins. Co.</b> <b>19445</b>
	INSURER D : <b>STATE COMPENSATION INS. FUND OF CA</b> <b>35076</b>
INSURER E : INSURER F :	

**COVERAGES      CERTIFICATE NUMBER:      REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR			103GL001270504	2/1/2020	2/1/2021	EACH OCCURRENCE \$ <b>1,000,000</b>
							DAMAGE TO RENTED PREMISES (Ea occurrence) \$ <b>300,000</b>
							MED EXP (Any one person) \$ <b>10,000</b>
							PERSONAL & ADV INJURY \$ <b>1,000,000</b>
							GENERAL AGGREGATE \$ <b>2,000,000</b>
							PRODUCTS - COMPI/OP AGG \$ <b>2,000,000</b>
							<b>PROJECT GENERAL</b> \$ <b>5,000,000</b>
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			BAS57085113	8/19/2019	8/19/2020	COMBINED SINGLE LIMIT (Ea accident) \$ <b>1,000,000</b>
							BODILY INJURY (Per person) \$
							BODILY INJURY (Per accident) \$
							PROPERTY DAMAGE (Per accident) \$
							\$
C	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE			EBU015853055	2/1/2020	2/1/2021	EACH OCCURRENCE \$ <b>3,000,000</b>
							AGGREGATE \$ <b>3,000,000</b>
							\$
D	<input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N If yes, describe under DESCRIPTION OF OPERATIONS below			9156796-19	4/19/2019	4/19/2020	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER
							E.L. EACH ACCIDENT \$ <b>1,000,000</b>
							E.L. DISEASE - EA EMPLOYEE \$ <b>1,000,000</b>
							E.L. DISEASE - POLICY LIMIT \$ <b>1,000,000</b>

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

<b>CERTIFICATE HOLDER</b>  Gravenstein Union School District 3840 Twig Ave Sebastopol, CA 95472	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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3663 North Laughlin Road, Suite 200  
Santa Rosa, CA 95403  
707.824.8440



March 25, 2020

Gravenstein Union School District  
Dave Rose, Superintendent  
3840 Twig Ave.  
Sebastopol, CA. 95472



***RE: Request for Statement of Proposals for  
Project Management Services***

We appreciate the opportunity to submit our Qualifications and Proposal for Project Management Services to the Gravenstein Union School District. **RGM Kramer Inc (RGMK)** was incorporated through the thoughtful merger of two well-established public-school agency CM firms, RGM & Associates Inc., founded in 1987 and Kramer Project Development Company Inc., founded in 2003. Both company's' founding Principals and key staff are fully engaged in RGMK. Both founding firms and RGMK are recognized by the public-school community for their dedication, leadership, responsible business practices and ability to develop confidence and trust from our clients and their supporting communities.

***WHO WE ARE...*** RGM KRAMER, Inc. is a Construction Program and Management firm with a solid and proven background in developing and managing school construction programs. Beginning in 1987 as a General Contractor building both public and private facilities, in 1993 RGM turned its focus almost exclusively to K-12 construction planning and management consulting. Our staff's 32 years of "in the trenches" experience as a general contractor and construction manager has given us the extensive construction expertise that sets us apart in our agency role serving our public clients. We possess a wealth of experience working with all school facility agencies including the Division of the State Architect (DSA), the California Department of Education (CDE), the Office of Public School Construction (OPSC), the Department of Toxic Substances (DTSC) as well as extensive knowledge with the Public Contract Code, Education Code and the California Building Code.

***WHERE WE WORK...*** RGMK's main office is in Concord with regional offices in Santa Rosa and San Jose. We provide an extensive menu of program, planning and management services to our clients throughout Northern California. We are currently managing comprehensive bond programs for Bellevue Union SD, Alexander Valley USD, Pope Valley USD (Napa), Brentwood Union SD, Jefferson Elementary SD (Daly City), Lafayette SD, Moraga SD, Martinez USD, Monterey Peninsula USD, Redwood City SD, San Leandro USD, Tracy Joint USD, Soquel ESD, Mountain View Los Altos HSD, Portola Valley SD, Loma Prieta SD and the San Mateo County Office of Education. In addition, we are providing planning and consulting for the West County Transportation Agency, Oak Grove USD, Piner-Olivet USD, Menlo Park City SD, River Delta USD, Cambrian SD, Los Gatos Union SD, Scotts Valley USD, Los Gatos Saratoga HSD and the Sequoia Union High School District.

***WHAT WE DO...*** We offer a methodical "hands on" approach to the planning and construction of school facilities, born from our experience actually building schools. Additionally, we've nurtured our understanding of the nuances of public-school operations, school boards and communities. We're capable of managing both new construction and modernization programs of varying types and complexities. RGM Kramer Inc has developed Facility Assessments for many of its district clients and has had extensive experience assisting with the creation or updating of Facilities Master Plans. RGM Kramer Inc will expertly guide you through the Planning, Pre-Construction, Construction and Post-Construction phases of your projects with the thoughtfulness, skill and proficiency necessary to ensure success.

RGMK clientele will attest to our success and professionalism, and our ability to assemble a team that will best suit the needs of the Gravenstein Union School District. We encourage you to contact our clients and learn how we have helped them succeed in similar programs and proved our immeasurable value along the way.

Respectfully Submitted,

  
Ralph J. Caputo, CEO



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I	EXPERIENCE
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	ADDENDUM



RGМК Corporate Office

**RGM KRAMER, Inc.**  
**Locations and Contacts**

**Corporate Office &  
Northern California Office**

3230 Monument Way  
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www.rgmkramer.com  
Federal ID #84-2164123  
Contractor License #: 509513  
Architect License #: 23943

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Office**

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San Jose, CA 95117  
Phone: (408) 246-6327  
Fax: (408) 246-6354



Jack London Elementary School, Piner-Olivet USD, Santa Rosa

**RGM KRAMER, Inc.** is the official merged company of two well established Northern California agency CM firms; RGM & Associates founded in 1987 and Kramer Project Development Co. Inc. founded in 2003. The Principals of the firm are Ralph J. Caputo, CEO, and Rick Kramer, President, both are actively engaged in the firm. The Principals hold an active "B" Contractor's California License #509513 Issued 1987 (Expires 2021) and an active California Architects License #23943 Issued 1993 (Expires 2021). These Licenses have never been suspended or revoked.

**RGM KRAMER, Inc.** provides comprehensive planning, funding support, facility assessments, educational specification consulting, facility master planning, pre-construction services, construction phasing and management, field construction management, expenditure reporting, grant writing, and other specialized services. Our experienced Project Managers and Construction Managers have proven experience and expertise in completing projects for K-12 districts with programs similar to the needs of the Dublin Unified School District.

RGMK currently has a staff of 67 full-time personnel, including 32 project and construction managers, and has maintained continual, controlled growth, bringing in new personnel with diverse education and job-related experience in architecture, engineering, construction, business and construction management.

## SUB-CONSULTANTS

None Proposed

**RGM Kramer, Inc.** has sufficient staff and expertise to perform all the tasks outlined in the Request for Qualifications for Construction Management Services for the Roseland School District.

We do not anticipate hiring any sub-consultants.



Jack London Elementary School, Piner-Olivet Union School District, Santa Rosa, CA





**RGM and Associates** holds a currently active B - General Building Contractor License # 509513, issued by the Contractors State License Board on 4/23/1987. RGM's DIR Registration number is #1000000320.

RGM further certifies that its license has never been suspended or revoked and we are legally permitted and properly licensed to conduct Program and Construction Management Services in the State of California.

**Please see resumes for individual licenses and certifications.**



### RGMK staffing support:

• <b>Ralph Caputo</b>	CEO	Principal Oversight and Leadership
• <b>Rick Kramer</b>	President	Principal Oversight and Leadership
• <b>Steve Petcavich</b>	Project Manager	Project Management
• <b>Matt Medeiros</b>	Project Manager	Project Management
• <b>Sandra Murphy</b>	Project Coordinator	Project Coordinator, Document Control
• <b>Todd Fletcher</b>	Field Engineer	Field Engineer
• <b>Marlin Jones</b>	Sr. Project Estimator	Construction Cost Estimator
• <b>Andrea Noble</b>	Funding Specialist	OPSC SFP/GO Bond Support
• <b>Susan Kettlewell</b>	Labor Compliance	Labor Compliance, Legacy Closeout

### Principal Oversight

**Ralph Caputo** and **Rick Kramer** will provide principal oversight and facility guidance, procurement strategies and project technical and schedule analysis. Both principals can also be available to support district staff with Board Meetings, Bond Oversight Committee Meetings, routine and special updates, community outreach and steering meetings, as needed.

### Primary Office & Executive

The office serving Gravenstein will be our **RGMK Office** located at 1101 College Avenue, Santa Rosa, CA 95404. **Phone (707) 575-9550**. **Steve Petcavich, Project Manager**, will serve as RGMK's Project Executive and can assist the District in developing staffing needs, assignments, contracts, construction management and implementation plans, and will provide guidance to the Project Management staff and District.

### Project Managers & Construction Managers

RGMK has highly qualified project managers and construction managers, ready to assist the District with planning, project management, construction contract administration and contract closeout responsibilities. Depending on the specific project needs and project delivery model, we will staff projects in coordination with the District and adjust as District needs change.

**Steve Petcavich, Project Manager** and **Matt Madeiros, Project Manager** will provide project management and supervise administrative support staff that may be used on specific projects. **Todd Fletcher** will provide supervision and reporting on projects in the field.

### Administrative Support

**Sandra Murphy, Project Coordinator**, will provide administrative support. Under oversight of the project managers, RGMK's administrative support staff will prepare bid documents, maintain contract documents and files, issue plans, solicit bidder interest, track Submittals, RFI's, Change Orders, payments and waivers, and facilitate prompt project closeout.

### Estimating, Constructability Reviews, Scheduling

**Marlin Jones** and **Matt Madeiros** will provide estimating, program budgeting, assist with planning, procurement, phasing and implementation strategies, and scheduling.

### State Program Funding / DSA Legacy Closeout

**Andrea Noble** is an expert with the OPSC funding program requirements, as well as DSA criteria, and can provide support and assistance to your funding consultant and design team. **Susan Kettlewell** is a specialist in labor compliance, DSA certification, and closeout of Legacy Projects and is readily available to support the needs of LLESD.

RGMK has a continuously growing staff of 70+ employees who may be assigned to best suit the District's Program and needs.





**Memberships:**

- Coalition for Adequate School Housing
- Institute for Conflict Management
- Association of California Construction Managers
- Dispute Review Board Foundation

**Ralph J. Caputo, CEO, Principal Oversight**

Bachelor of Arts, Teaching Credential, Calif. State University, Sonoma 1979. California Contractor's License #654117, Class B, Advance Arbitration Certificate Program - 2000 Construction Mediation and Dispute Resolution Programs -1998, 1999, Contractors State License Board Arbitrator, Arbitration, Mediation & Conciliation Center and Arbitration Works - 2000 to 2008

Ralph Caputo has been involved in the construction industry for over 40 years and presently serves as the CEO for RGM Kramer. Ralph oversees the daily operations and financial responsibilities of the corporation and provides principal oversight and comprehensive program, planning and leadership services to clients. Ralph engages with the Districts administrative staff, Architect and other stakeholders in defining roles and responsibilities and will help tailor a Construction Planning and Management Program specific to the needs of the client. Ralph offers valuable assistance with Board and community presentations. He also has considerable training and experience in dispute resolution and frequently assists Districts and legal counsel in analyzing troubled projects and mitigating conflicts.

**Selected School CM Experience Includes:**

- Principal Oversight & Bond Program Mgmt. – Menlo Park City School District \$145M
- Principal Oversight & Bond Program Mgmt. - Antioch Unified SD - \$330M
- Principal Oversight & Bond Program Mgmt.- Monterey Peninsula SD - \$275M
- Principal Oversight & Bond Program Mgmt.- Redwood City SD - \$193M

**Rick Kramer, President, Principal Oversight**

MS in Engineering, Construction Engineering & Mgmt., Stanford University, 1996  
 BS in Architectural Studies and Bachelor of Architecture, NDSU, 1987  
 National Council of Architectural Registration Boards, Certification #46634, 1993  
 Adjunct Professor, Civil Engineering, San Jose State University, since 2007  
 Leadership in Energy and Environmental Design Accredited Professional, 2008

Rick Kramer has been involved in the construction industry for over 32 years. He has extensive experience in all phases of facility management, design and construction. Rick served as a Navy Civil Engineer Corps Officer, managed Stanford University's Housing Capital Improvement Program and managed construction for a general contractor before starting his first business.

Rick founded Kramer Project Development Company in 2003. Rick's strengths include program planning, master plan development, implementation plan development, bond financial systems and design management. Rick provides planning and program leadership for numerous school district construction programs.

**Selected School CM Experience Includes:**

- Principal Oversight & Bond Program Mgmt. - Mountain View Los Altos HSD - \$360M
- Principal Oversight & Bond Program Mgmt. - Cambrian SD - \$90M
- Principal Oversight & Bond Program Mgmt. - Los Gatos Saratoga HSD - \$90M
- Principal Oversight & Bond Program Mgmt. - Los Gatos Union SD - \$60M
- Principal Oversight & Bond Program Mgmt. - Soquel School District - \$50M



**Memberships:**

- American Institute of Architects
- National Council of Architectural Registration Boards
- Coalition for Adequate School Housing
- US Green Building Council

## Marlin Jones, Senior Program/Project Manager, Estimator

Marlin Jones has been involved in many facets within the construction industry for 49 years and is one of our most valued and resourceful managers. He provides general bond program and specialized project oversight. As a Senior Project Manager, Marlin manages construction projects in all phases, from planning to close-out. He provides expertise in developing project schedules and budgets. Marlin also performs conceptual and detailed cost estimates, plan reviews and change order analysis. Marlin has developed Facility Assessments for numerous District clients, including River Delta USD and Antioch Unified.

### Credentials:

Bachelor of Science, Architecture and Political Science, University of Kansas

### Selected Planning and Construction Management Experience:

- Measure B Bond Program Management - Antioch Unified School District \$52.5M
- Project Manager - New Stadium/Track/Field/Admin/Library - Antioch High School - Antioch USD - \$19.9M
- Program Manager - Measure C Bond Program - Antioch Unified School District - \$56.5M
- Program Manager - Measure C Bond Program - Antioch Unified School District - \$61.7M
- Program Manager - New Campus Dozier Libbey Medical High School - Antioch Unified School District - \$20M
- Program Manager - New Campus Orchard Park School - Antioch Unified School District - \$18.3M

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## Steve Petcavich, Project Manager, Estimator

Steve began his career at the landscape architecture firm, Cardoza Delalo and then went on to work for RHL Design Group as a Landscape Architect. Steve began in construction as an Assistant Project Manager / Estimator with Midstate Construction. He then became a Senior Project Manager for Jeff Luchetti Construction. Steve has accumulated 30 years of experience in the construction industry. His experience includes both private and public works projects involving a wide variety of building systems. Steve is well organized and detailed in developing project schedules, cost reports, plans and specification review, constructability, project budgets and project close-outs. His design training and experience provides an additional asset to project teams due to his unique perspective in working with Architects.

### Credentials:

Bachelor of Science, Landscape Architecture, California Polytechnic State University, San Luis Obispo, CA  
Landscape Architect, Certificate # 3205

### Selected Experience Includes:

- Project Manager – Modernization, Alexander Valley Union School District - \$ 5.3 M
- Project Manager – Modernization and Additions, West County Transportation Agency - \$3.3Million
- Project Manager – Modernization, Pope Valley Elementary - \$2.35 Million
- Project Manager – New Modular Classrooms, Willowside School, Oak Grove USD - \$ 2.5 M
- Project Manager - New Modular Classrooms and Restroom, Oak Grove School, Oak Grove USD - \$ 1 Million
- Project Manager – Jack London Elementary School, Piner-Olivet USD, Santa Rosa - \$ 13 M

## Sandra Murphy, Project Coordinator

Sandra began working for RGM in 2017 as the Project Coordinator for the Santa Rosa office. Sandra previously gained construction experience working for General Contracting firms. Sandra provides project management support for numerous projects for a range of school district clients. Sandra is adept at managing document control processes, and has provided administrative support to numerous RGMK clients, including the West County Transportation Agency, and the Dunham Elementary, Oak Grove Union, Sebastopol Union, Bellevue Union and Alexander Valley School Districts.

### Selected Experience Includes:

- Project Coordinator - Various District-Wide Projects – Bellevue Union School District
- Project Coordinator – New Additions – West County Transportation Agency
- Project Coordinator – BrookHaven Multi-Purpose Building – Sebastopol Union School District
- Project Coordinator – New Modular Classrooms – Oak Grove Union School District
- Project Coordinator - Modernization Project – Alexander Valley School District

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## Todd Fletcher, Field Engineer

Todd Fletcher joined RGMK in early 2019. Todd started his career in Public Relations and Community Service and later went on to construction where he gained over 20 years of field experience. Todd provided daily field supervision for the Modular Classroom Replacement Project at the Willowside Middle School (Oak Grove USD), a fast-track project that went from demolition to occupancy in the 2019 summer construction window. Todd currently provides field supervision and coordination for RGMK projects in several Bay Area school districts, including Bellevue Union and Sebastopol Union.

### Selected Experience Includes:

- Field Engineer - Various District-Wide Projects – Bellevue Union School District
  - Field Engineer – BrookHaven Multi-Purpose Building – Sebastopol Union School District
  - Field Engineer – New Modular Classrooms – Oak Grove Union School District
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### **Mathew Medeiros, Project Manager/Construction Plan Reviewer/Scheduler**

For the last 22-years Matt has held a variety of positions in the Construction and Construction Management industry. He has extensive experience in Construction Review and Scheduling as well as Project Management. He also has experience in Cost Estimating, Value Engineering, Standard Reporting Procedures and Project Delivery. He is also well versed in all other areas of Construction Management, Construction Processes, Documentation and Client Relations.

#### **Credentials:**

Bachelor of Science, Mathematics and Secondary Education, Western Washington University, 1996 LEED Certification

#### **Selected Experience Includes:**

- K-8 Schools: Elk Grove Unified School District, San Diego City Schools, Laguna Unified School District, Hemet Unified School District, Mount Diablo Unified School District, Pittsburg Unified School District, Dublin Unified School District.
- K-12 Schools: San Diego City Schools, Pittsburg Unified School District, Benicia Unified School District
- K-14 Schools: Yosemite Community College District, Los Rios Community College District.

### **Andrea Noble, Senior Program Manager/Funding and Planning Assistance**

Andrea has acted as a Bond and Construction Manager for numerous K-12 programs and provides facility assessments, master planning, OPSC liaison and budget management services. She has acquired particular expertise in bond planning and State funding programs. She was instrumental in developing Facility Assessments for the John Swett Unified School District, Benicia Unified and Piner-Olivet USD. She has expertise in Facility Hardship appeals and diverse funding sources. Andrea provides funding services, including preparation of CDE, OPSC documentation for SFP projects, OPSC Expenditure Reports and represents school districts during the SFP closeout and audit processes.

#### **Credentials:**

Bachelor of Arts, University of California, Santa Cruz, 1971  
Construction Management Certification, Santa Rosa Jr. College, 1988  
California Contractor's License #649672

#### **Selected Experience Includes:**

- Program Manager - Measure S Bond Program Planning - Benicia Unified School District - \$49.6M
- Program Manager - Measure K Bond Program - Oak Grove Union School District - \$6M
- Program Manager - Measure A Bond Program - John Swett Unified School District \$46.1M
- Program/Project Manager - Jack London ES - Piner-Olivet Union School District - \$15 M
- Program Manager - Modernization & New Construction - West Sonoma County Union High School District - \$25M

### **Susan Kettlewell, DSA Legacy Project Closeout/Labor Compliance Manager**

Since joining our team more than 11 years ago, Susan has demonstrated proficiency at interpreting complexities of labor compliance legislation as it applies to public works construction. Currently, Susan has turned her attention to assisting school districts with identifying projects that did not receive DSA certification at the completion of construction ("legacy projects"). She is proficient at identifying documentation and processes necessary for certification legacy projects.

#### **Credentials:**

Bachelor of Fine Arts, California College of the Arts, Oakland, 1985  
Leadership Management Certificate, University of the Pacific, 2000  
Labor Compliance Program Training for California Public Works, Fresno City College, 2007

#### **Selected Experience Includes:**

- Legacy Closeout – Redwood City School District
- Legacy Closeout – Monterey Peninsula Unified School District
- Labor Compliance Manager – Napa Valley Unified School District
- Labor Compliance Manager – Menlo Park City School District



## DOCUMENT REVIEW PROCESS

Document reviews are ideally designed to look at the project from a contractor's perspective and determine if the drawings and specifications are complete and accurate enough to estimate properly and from which to build. At RGM Kramer, we believe our construction background, combined with our experience in the design professions, estimating and inspection, provide us with a unique edge over other firms in conducting comprehensive constructability and coordination reviews. We make a point of having staff persons with different perspectives (building construction, estimating, engineering, inspection, architectural, and specialty trades, where applicable) review the drawings. The document review process is the "first line of defense" against potential change orders. We want to catch errors, inconsistencies, coordination issues, and potential cost savings in the documents before the project goes to bid.

**The following summarizes the various types of plan review services which we offer.**

### CONSTRUCTABILITY REVIEW

A Constructability Review is a review of the plans and specifications from a Contractor's perspective and is intended to determine if the documents are *biddable* and *buildable*. The reviewer determines if all potential bidders will be able to bid accurately based on the information provided in the plans, and if the successful bidder can build from that same information. The reviewer will also check if the materials and equipment specified are readily available and proper for the intended purpose, noting any long lead items which may affect sequencing and project continuity. A thorough Constructability Review reduces problems encountered with substitution requests, numerous Requests for Information (RFI's) and resulting delays and Change Orders. A Constructability Review may also involve major components of the other reviews defined below.

### COORDINATION REVIEW

A Coordination Review, sometimes referred to as an Interdisciplinary Review, is typically intended to cross reference the Architectural drawings with the technical specifications and the various engineering disciplines (i.e., structural, mechanical, plumbing and electrical drawings). The purpose is to alleviate internal inconsistencies in the documents by ensuring proper coordination between the various disciplines, thereby mitigating conflicts between the trades and potential change orders.

### CODE COMPLIANCE REVIEW

A Code Compliance Review consists of an examination of the documents in relation to Title 24, DSA criteria and

other applicable Building Codes. This will include review for fire-life-safety, ADA access, structural, plumbing, mechanical and electrical code compliance. Our review staff includes DSA-certified, working inspectors who know the local DSA field representatives' particular criteria and special issue items.

### VALUE ENGINEERING

Value Engineering is a review intended to offer alternative materials and methods which will essentially serve the same aesthetic and structural purpose but may be more readily available and less expensive than that which is specified. A proper review will also consider life cycle cost factors and maintenance and operation expenses on machinery and appliances. An extension of the review often entails a comprehensive search for cost saving factors which may compromise the original design somewhat but is intended to help bring projects back into budget.

### PROJECT MANUAL AND SPECIFICATION REVIEW

**A review of the project manual is two-fold:**

- Review of the technical specifications for compliance with District Standards, completeness and compatibility with the drawings. This aspect is described as a part of the Coordination Review above.
- Review of the front-end documents (the contract, instructions to bidders, bond forms, general, supplemental and special conditions, payment procedures, coordination requirements, insurance requirements and other Division 1 requirements) for compliance with current regulations and complete coverage of contractual issues.

### COST ESTIMATING AND PROJECT BUDGETS

RGM Kramer, Inc. offers professional estimating services to assist the District and Architect in defining an adequate project budget and identifying appropriate bid alternates. This can be done conceptually at the preliminary stages of design development and, more accurately, at the 90%-to-completion stage of the drawings. The budget/cost estimates provided by RGMK are performed by competent and experienced staff: professional estimators, project managers and superintendents who made their living bidding and running projects as contractors prior to becoming owner's representatives. Therefore, the final budgets and value engineering we provide are not based merely on square foot or book analysis, but on "real world" experience.

## PROGRAM MANAGEMENT APPROACH

RGMK Kramer, Inc. provides a full menu of services, and has worked with all State and many local agencies to properly plan and execute school construction programs. We often act as the clearing house to manage the selection, coordination and submission of all applicable documentation to the respective governing agencies. Our team members are fluent in Division of the State Architect (DSA), California Department of Education (CDE) and Office of Public School Construction (OPSC) programs and requirements, including CTE and Joint Use Facilities, CEQA and DTSC protocol. Our experience managing many commensurate programs, and a close relationship with these agencies, enables us to assist our clients to follow design and regulatory approval timelines.

Our approach to Construction Management can be summarized as a highly collaborative process. We recognize that every client has different needs and requirements, in-house or other consultant expertise and involvement related to their construction program. We work with all the parties associated with a project to define a process that will achieve the best value and help expedite the design and construction program. Since our

fundamental role is to facilitate the design and construction process, detailed planning, effective communication and coordination are essential.

### Communication and Coordination

The final program will clearly document the District's educational program, design criteria, and Bond program goals and requirements. To promote a successful program, close communication and coordination with a variety of diverse stakeholders, regulatory agencies, planning and advisory committees, and community and decision makers is essential. We facilitate design review meetings and establish budget workshops during the design phase and involve the appropriate District, Maintenance, Operation and Transportation (MOT) and user groups in the process. We conduct weekly project meetings during construction and provide routine status reports and other construction or funding related items to the District, Governing Board, Bond Oversight Committee and the Community.

Effective communication also requires an emphasis to frequently communicate with all team members and user



groups and provide access to relevant project information. This enables the design and management team to recognize potential issues early, develop and implement solutions and keep the projects moving forward efficiently in design and construction. Our role is to facilitate the process and complement the architect's efforts, while serving the District's best interests.

### Anticipating and Planning for Problems

No project plan or design is perfect. Our project managers are trained to anticipate problems. With each anticipated problem, we bring potential solutions.

### Understanding Program and Quality Expectations

A crucial task in planning is a discussion with the design team and the District regarding the standard of quality, specific design components, program and educational features and other criteria, such as environmental (green) construction goals and components important to MOT. This information will be used to define the program and establish quality and product guidelines for the project.

### Cost Control

Through the planning process we can identify potential cost savings. By identifying potential problem areas early, we facilitate informed decisions and help ensure a successful project. Our input helps to develop logical contract packages, utilizing phasing, sequencing and other contract implementation methodology to minimize disruption at the site and optimize the District's construction budget and schedule.

### Pre-Design and Design Development Phases

Utilizing the experience and talents of RGMK during the planning and design phases will prove an important component in the timely and cost-effective development and completion of the overall program. The Proposed team can help the District and design team assess its program goals, coordinate with MOT and user groups and review proposed building materials, check design trends with the budget and help develop realistic budgets.

Without this oversight, many Districts go to bid only to find they cannot afford the design they worked so hard to develop. This not only renders their efforts moot and leaves them at odds with the design team, but can compound budget constraints and schedule. We have a successful track record in bringing projects on time and within budget.

### Funding Analysis and Support

RGMK has provided funding support services working in conjunction with the OPSC, District's funding consultant

or directly with Business Services since the inception of the SFP program. In many districts where we provide full service program and construction management, we complete funding application documents, track applications through the OPSC process, and provide annual and final expenditure reports.



### DSA and CDE Coordination

RGMK can help the District and design team secure approval of plans and specifications from the Division of the State Architect (DSA), Office of Public School Construction (OPSC), California Department of Education (CDE) and local agencies. We are involved in assisting Districts with closing out projects with the DSA, both current projects where we provide assistance to the project architect and old projects in districts that have been closed without certification. We have successfully worked with districts and DSA to close projects that have been archived for years, or have other obstacles, such as inspectors or designers who cannot be located.

### Constructability Reviews

RGMK performs comprehensive plan and specification reviews to ensure that the plans are *biddable* and *buildable*. Detailed constructability reviews literally pay for themselves by mitigating potential change orders and associated delays and cost overruns. Success with cost and quality control starts in the planning phase with a thorough review of the plans and specifications for constructability and compliance with District standards.

RGMK and Associates performs its constructability reviews from a contractor's perspective to determine if the documents are sufficient to compile a bid and adequate for the contractor to determine how to construct the project. The plan reviewer also checks that the materials and methods specified are readily available, proper for the purpose, and in compliance with District



standards. A thorough plan review includes a coordination review which cross references the architectural drawings with the technical specifications and the various engineering, (structural, mechanical, plumbing, and electrical), drawings to alleviate internal inconsistencies in the documents.

RGMK also performs code compliance reviews which consist of an examination of the documents in relation to Title 24, DSA criteria, and applicable Building Codes. This includes reviews for fire, life-safety, ADA access, structural, plumbing, mechanical and electrical code compliance.

### **Contract Documents**

In conjunction with the Architect and legal counsel, RGMK thoroughly reviews the front-end, (contract documents), often adding supplemental conditions and project specific criteria to help avoid disputes, claims and potential change orders.

### **Bidding/Negotiation**

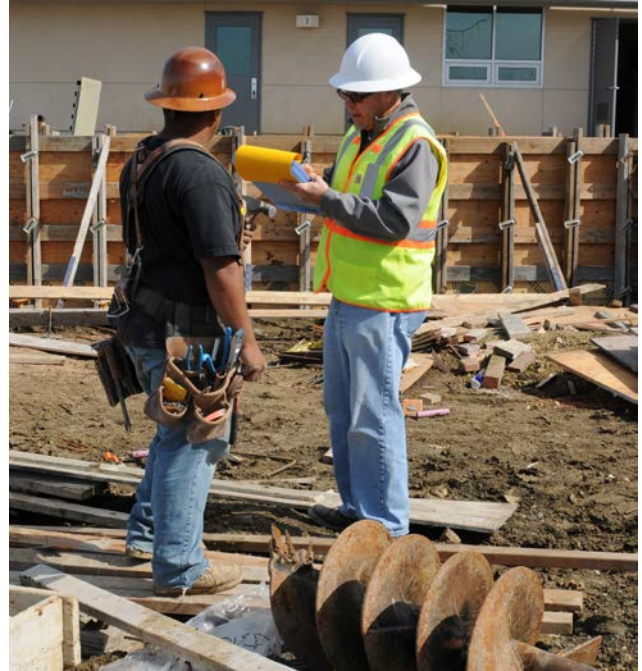
RGMK can facilitate the entire bid process. We help prepare the advertisements for bid and solicit contractors and subcontractors, track bid document and addendum distribution, and in conducting pre-bid walkthroughs and bid openings. Our thorough oversight of the bid process reduces the chance of bid protests and delays or claims. Upon receipt of Bids, we also prepare a report and recommendation for the District to approve award, issue the Notice of Award, issue and execute contracts and bonds, check insurance and bonds with District Counsel and issue the Notice to Proceed.

### **Meeting Management**

Project meetings are a key communication forum. RGMK believes in collaborating with all parties to ensure we are "on the same page". We do not believe in having a meeting without a clear purpose, agenda, schedule, and resulting action items.

RGMK conducts pre-construction meetings that introduce the contractor to the design and inspection professionals. Before the project starts, we require the contractor produce a Schedule of Values and a proposed project schedule that demonstrate a thorough knowledge of the project and the materials and methods that will be used to meet the District's expectations and contract requirements. A discussion of the testing and inspection requirements, including those of the DSA, local fire authority, and various utilities is held at the pre-construction meeting. The individual or team will participate in weekly and monthly construction meetings

as well other meetings related to the project. We maintain meeting notes to record, (and track), decisions, direction and action items. Progress meetings and the minutes of those meetings are invaluable in ensuring that the contractor complies with the plans and that testing and inspection requirements are being met. Progress meetings are usually followed by a job walk, so that the design team, the inspector, and the project manager observe the progress of the project.



### **Information Management**

RGMK establishes document filing and retrieval systems in conformance with the District's standards. Our information system will provide the project team rapid access to key project documents, where we primarily use Meridian Systems Prolog suite or custom software.

### **Cash Flow Projections and Resource Management**

It is crucial to any program or project to maintain efficient cash flow. We can provide Cash Flow Projections tied to the master schedule to help ensure that the district can construct within the bond authority and anticipate phased revenue sources. Good general contractors and subcontractors bid to agencies that pay promptly. Our forms and procedures for managing payment requests are designed to provide the information that the District business office needs to process payment applications in a timely manner, along with all the assurances that the pay requests are reasonable, legal, and undisputed. Our expertise and communication skills allow the District to efficiently perform its obligations as the owner of a construction project and conform to the requirements of its bond program.

## Submittals

RGMK prepares a list of anticipated submittals and confirms with the contractors when the documents will be submitted. The submittal logs will track documents from initial receipt to final approval. Submittal status is a topic of each weekly meeting so that the review process does not impact the schedule.

## Requests for Information Management

RGMK receives and monitors Requests for Information, (RFIs), using a detailed RFI tracking log, which becomes an agenda item at each weekly meeting. Any RFI that has the potential for a cost increase is entered in the potential change log and tracked.



## Change Order Philosophy

The best way to bring a project in on time and under budget is to plan properly and control changes. While every project will experience some degree of change orders, effective project management means mitigating the impact to the project schedule and budget.

Change Orders often carry a negative stigma with them and essentially mean deviations from the plans and intended scope. Moreover, they depict unanticipated impact to the project budget. However, Change Orders are an integral part of the construction process. Virtually every project will experience some degree of change orders. Because of the contractual relationship, changes in the work will either be requested from the District or the Contractor. They can, however, stem from a myriad of parties and reasons.

## When the District puts a project out for bid, in effect, they warrant that:

- The project can be built per the plans and specifications.
- All the components will fit together as depicted.

- It is physically possible to accomplish construction of the project through reasonable means, (unless otherwise specified).
- The project construction can be accomplished within the prescribed time.

Change Order requests brought by the Contractor will usually relate to problems encountered with existing conditions, conflicts or discrepancies in the plans and specifications, Contractor deviations, or field modifications by DSA or the architect. Other Change Order requests are owner-initiated, value-added items. It should also be noted, that not all change orders are additive, some are deductive. Nevertheless, a preponderance of changes can lead to a claim for additional compensation beyond the actual cost of performing the additional work. Therefore, a balance must always be considered in any project. This is where master planning and thorough plan reviews prove invaluable prior to the bid.

## Materials Testing Coordination

RGMK assists the Project Inspection team in coordinating, monitoring, and logging all field and laboratory testing required by contract or code. If the testing reveals a non-conformance, the PM team will notify the contractor and track the agreed remedial actions until the non-conforming work is replaced, repaired and accepted.

## Project Close Out

From the beginning and throughout the project, RGMK will work diligently toward prompt project close out. As the project nears completion, we will develop a log of required training, operations and maintenance manuals, spare parts, warranties and other closeout requirements. We will work with the District and the design team to resolve final punch list items and coordinate completion with final payment and close out documentation. We will initiate the closeout process to ensure a smooth transition to occupancy of the facility. We continue after the construction is complete to assist the District and Design team to close out projects with the DSA and the OPSC in a timely manner.

## Warranty

During the warranty period, RGMK notifies the contractor of warranty items to be corrected and follows insuring that they are corrected properly and in a timely manner.



## SERVICES

### PLANNING AND PRE-CONSTRUCTION SERVICES

- Site Evaluations/Feasibility Studies
- Facility Condition Assessments
- Consultant Team Selection/RFP Process
- Planning and Design Management
- OPSC Planning & Facilitation
- Consultant Team Coordination
- Permit and Regulatory Approval Coordination
- Design/Public Meetings Facilitation
- Schematic and Detailed Cost Estimates
- Master Budget Compilation and Review
- Contract & Constructability Reviews
- Value Engineering Analysis
- Schedule Development and Phasing Analysis
- District-Wide Standards & Procedures
- Contractor Pre-Qualification
- Standardized Bond & Insurance Requirements
- Preparation of Bid Documents

- District-Tailored Contracts
- Project Manual Compilation

### CONSTRUCTION/POST CONSTRUCTION SERVICES

- Bid Process Management
- On-site Project Management
- Contract Administration Services
- Quality Assurance/Testing and Inspection Oversight
- Project Progress and Financial Reports
- Project Documentation Controls
- Project Schedule Management
- Progress Meeting Coordination
- Labor Compliance Program Administration
- Change Order Analysis and Negotiations
- Warranty Analysis and Coordination
- PLA Coordination
- OPSC Close-out Audits & Substantial Progress Reporting
- Claims Analysis & Mitigation
- Contract Closeout Assistance (OPSC/DSA)

### REPRESENTATIVE LIST OF CLIENT SCHOOL DISTRICTS

- Alhambra SD
- Acalanes Unified HSD
- Amador County Office of Education
- Amador County Unified SD
- Antioch Unified SD
- Bellevue Union SD
- Benicia Unified SD
- Bennett Valley Union ESD
- Berryessa Union SD
- Brentwood Union SD
- Byron Union SD
- Calistoga Joint Unified SD
- Cambrian SD
- Cloverdale Unified SD
- Contra Costa County Office of Education
- Contra Costa Community College District
- Dixon USD (Facility Assessments)
- Dublin USD
- Forestville Union SD
- Galt Joint Union HSD
- Guerneville Unified SD
- Geyserville USD
- Heber SD (Planning Consulting)
- Horicon Elementary SD
- Jefferson Elementary SD (Tracy)
- Jefferson Elementary SD (Daly City)
- John Swett Unified SD
- Kenwood ESD
- Lafayette SD
- Live Oak SD
- Livingston Union SD
- Loma Prieta Joint USD
- Los Gatos Union SD
- Los Gatos-Saratoga UHSD
- Mark West Union SD
- Martinez Unified SD
- Menlo Park City SD
- Merced Union High SD
- Monterey Peninsula USD
- Mountain View-Los Altos UHSD
- Mt. Diablo USD
- Moraga SD
- Napa Valley Unified SD
- Oak Grove Union SD
- Oakland Unified SD
- Oakley Union ESD
- Orinda Unified SD
- Piner-Olivet Union SD
- Pioneer Union SD
- Pittsburg Unified SD
- Pope Valley Union SD
- Portola Valley Elementary SD
- Red Bluff Joint Union HSD
- Redwood City Union SD
- River Delta Joint Unified SD
- San Jose Union SD
- San Leandro Unified SD
- San Lorenzo Valley Unified SD
- San Mateo County Office of Education
- San Ramon Valley Unified SD
- Scotts Valley Unified SD
- Sebastopol Union ESD
- Sequoia Union HSD
- Sonoma County Office of Education
- Sonoma Valley Unified SD
- Soquel Union Elementary SD
- Tracy Unified SD
- Twin Hills Union High SD
- West Contra Costa Unified SD
- West Sonoma County Union High SD
- Winters Joint Unified SD



\*Additional Service descriptions are mentioned in the previous section 3.3. Executive Summary



Taylor Mountain Elementary School

## Bellevue Union School District

3150 Education Drive  
Santa Rosa, CA 95407

### Client Contacts:

Roger Farrell, Director of Maintenance & Operations  
rfarrell@busd.org  
707-694-1817

Chris Kim, CBO  
ckim@busd.org  
707-542-5197

### Project Architects:

**TLCD Architecture**  
Don Tomasi, Principal  
don.tomasi@tlcd.com  
707-525-5600

**Wilson Architecture**  
Norm Wilson, Principal  
arcnorm@pacbell.net  
209-577-0114

**RGM and Associates** has provided project management, funding support, Prop 39 assistance, and labor compliance services to Bellevue for over two decades. RGM was instrumental in writing over half a million dollars in Emergency Repair Grants, which were fully funded in 2014, and then managing the repair / replacement projects. RGM assisted Bellevue to complete Stony Point Academy Phase 1, and to close out the three-phased Modernization project at Kawana. RGMK is currently working with Bellevue to complete over \$ 3 Million in bond projects, including major roofing projects at two sites, plaster repairs, painting and HVAC upgrades.

## Oak Grove Union School District

5299 Hall Road  
Santa Rosa, CA 95401

**Bond Program: \$6M**

### Client Contact:

Amy Prescott  
Chief Business Official  
707-545-0171  
aprescott@ogusd.org

Debbie Costello  
CBO, Willows USD  
Former CBO, Oak Grove USD  
530-934-6600, ext 5

### Project Architect:

Wilson Architecture  
Norm Wilson, Principal  
609 15<sup>th</sup> Street  
Modesto, CA 95354  
209-577-0114  
arcnorm@pacbell.net



Willowside Middle School

The Oak Grove Union School District selected **RGM and Associates in 2016** as its Construction Management firm to assist with planning and construction for their bond program. RGM completed several modernization and new construction projects over the summer of 2017, including kitchen upgrades, restroom upgrades, a new lunch shelter, and a new Maintenance building. RGM installed two reconditioned modulars at Willowside, and completed construction of two new modular classrooms and a restroom building for the Oak Grove school, and the improvement of the playing field, walking path, ramp and stairway. In 2019, RGMK managed the removal of five old portables at Willowside and their replacement with six new modular classrooms, including infrastructure and sitework upgrades. The removal and replacement of the classrooms was accomplished during the summer window, and the new classrooms were occupied in Fall of 2019.

**RGM and Associates  
Prior Relevant Experience**

BELLEVUE UNION ELEMENTARY SCHOOL DISTRICT 3150 EDUCATION DRIVE SANTA ROSA, CA 95407							Roger Farrell, Director of Maintenance & Operations rfarrell@busd.org 707-694-1817 Chris Kim, CBO, ckim@busd.org 707-542-5197	
PROJECT NAME / LOCATION	PROJECT TYPE	PROJECT COMPLETED	VALUE	CO's	LEAD STAFF	ARCHITECT	CONTRACTOR	IOR
<u>Bellevue ES HVAC and Electrical Upgrades</u>	Bond Project	2021	tdb		Matt Madeiros	Brokaw Design 6060 Dawn Drive Rohnert Park, CA 94927 (707) 284-2175	tdb	tdb
<u>Kawana Springs Roofing, Phase 2</u>	Bond Project	2020	\$ 272,380		Matt Madeiros	RGS Consulting, Inc. Robb Smith, Principal 775-750-1530 RGSConsulting@icloud.com	ALCAL Specialty Contracting, Inc. 42950 Osgood Road Fremont, CA 94539 (510) 477-9380	RGS Consulting
<u>Bellevue Roofing, Phase 2</u>	Bond Project	2020	\$ 370,215		Matt Madeiros	RGS Consulting, Inc. Robb Smith, Principal 775-750-1530 RGSConsulting@icloud.com	Henris Roofing 741 Petaluma Blvd South Petaluma, CA 94953 (707) 763-1535	RGS Consulting
<u>Kawana Springs Sewer Upgrades</u>	Bond Project	2020	\$ 305,000		Matt Madeiros	Brelje and Race Paul Bartholow 475 Aviation Boulevard, Suite 120 Santa Rosa, CA 95403 (707) 576-1322	Ghilotti Construction, Inc. 246 Ghilotti Avenue Santa Rosa, Ca 95407 (707) 585-1221	Brelje and Race
<u>Bellevue ES Gutter Demo, Fascia and Plaster Repairs</u>	Bond Project	2020	\$ 241,000		Matt Madeiros	N/A	DMR Builders, Inc. 2383 Ignacio Court Santa Rosa, CA 95401 (707) 596-7575	N/A
<u>Bellevue ES Covered Walkway Roofing, Phase 1</u>	Bond Project	2020	\$ 193,001		Matt Madeiros	RGS Consulting, Inc. Robb Smith, Principal 775-750-1530 RGSConsulting@icloud.com	ALCAL Specialty Contracting, Inc.	RGS Consulting
<u>Kawana Springs ES Covered Walkway Roofing, Phase 1</u>	Bond Project	2020	\$ 164,975		Matt Madeiros	RGS Consulting, Inc. Robb Smith, Principal 775-750-1530 RGSConsulting@icloud.com	Western Roofing, Inc.	RGS Consulting
<u>Meadowview Exterior Painting</u>	Bond Project	2019	\$ 207,000	\$0	Matt Madeiros	N/A	Silva Painting, Inc.	N/A
<u>Meadowview Play Structure, Phase II</u>	Replace in Kind	2019	\$ 35,621	\$0	Andrea Noble	N/A	All About Play	N/A
<u>Meadowview Siding Repair / Replacement</u>	Bond Project	2019	\$ 184,000	\$9,054	Matt Madeiros	N/A	DMR Builders, Inc.	N/A
<u>Early Learning Center Siding Repair</u>	Bond Project	2019	\$ 34,000	\$1,992	Matt Madeiros	N/A	DMR Builders, Inc.	N/A

**RGM and Associates  
Prior Relevant Experience**

<u><b>Bellevue Elementary School Play Structure</b></u>	Replace in Kind	2019	\$ 109,903	none	Andrea Noble	N/A	Yosso Group, Inc.	N/A
<u><b>Bellevue Elementary School Play Structure</b></u>	Replace in Kind	2018	\$ 79,000	none	Andrea Noble	N/A	All About Play	N/A
<u><b>Kawana Springs Close-out, Phase 1 &amp; 2, Including Emergency Vehicle Access Road Change Order</b></u>	Modernization	Close-out in 2017		\$156,247	Andrea Noble	TLCD Architects Don Tomasi don.tomasi@tlcd.com 707-525-5600	Wright Contracting, Inc.	Kurt Hirtzer
<u><b>Stony Point Academy, Phase 2</b></u>	Modular Campus	2016	\$ 500,000	\$5,500	Andrea Noble	TLCD Architects Don Tomasi don.tomasi@tlcd.com 707-525-5600	RV Stich Construction Vince Sigal Electric William-Scotsman Jesse Anaya Const Action Plumbing Advanced Security	Rory Everitt rory.everitt@hotmail.com
<u><b>Meadowview Kitchen Improvements and Walk-In Freezer</b></u>	Replace in Kind	2016	\$ 94,430	\$2,685	Andrea Noble	N/A	Castino Restaurant Supply Vince Sigal Electric Monster Construction	N/A
<u><b>Emergency Repair Projects at Bellevue School</b></u>	Various Repair and Replace	2016	\$ 203,000		Andrea Noble	Wilson Architecture Norm Wilson arcnorm@pacbell.net 209-577-0114	Aaron Paving Greg Pahlow Electric Community Playgrounds Conklin Brothers Carpet Monster Construction deRutte Builders	Richard Russell rick-russell@sbcglobal.net 707-823-9574
<u><b>Emergency Repair Projects at Kawana School</b></u>	Various Repair and Replace	2016	\$ 175,000		Andrea Noble	Wilson Architecture Norm Wilson arcnorm@pacbell.net 209-577-0114	Aaron Paving Custom Plumbing Community Playgrounds Monster Construction deRutte Builders HTI	Richard Russell rick-russell@sbcglobal.net 707-823-9574
<u><b>Bellevue Kitchen Build-out and Walk-in Freezer</b></u>	Appliance Upgrades	2014	\$ 86,462		Andrea Noble	Ballinger Kitchen Design	Castino Restaurant Supply Greg Pahlow Electric Monster Construction	N/A

**RGM and Associates  
Prior Relevant Experience**

OAK GROVE UNION SCHOOL DISTRICT 5299 HALL ROAD SANTA ROSA, CA 94501						Amy Prescott, CBO, OGUSD aprescott@ogusd.org (707) 545-0171, ext. 302 Debbie Costello, CBO Willows USD (530) 934-6600, ext 5		
PROJECT NAME / LOCATION	PROJECT TYPE	PROJECT COMPLETED	VALUE	CO'S	LEAD STAFF	ARCHITECT	CONTRACTOR	IOR
<u>Six New Modular Classroom Buildings at Willowside School</u>	Modernization (Replacement)	2019	\$ 2.4 Million	\$ 89 K	Andrea Noble Steve Petcavich	Wilson Architecture Norm Wilson (209) 577-0114 arcnorm@pacbell.net	Silver Creek, Inc. (Modular Classroom Buildings) ERA Construction (Sitework)	Bruce Mansell nspktor@comcast.net (707) 228-9300
<u>New Modular Classroom Building and Restroom Building at Oak Grove School</u>	New Construction	2018	\$1,009,034	\$4,620	Andrea Noble Steve Petcavich	Wilson Architecture Norm Wilson (209) 577-0114 arcnorm@pacbell.net	American Modular Systems Matthew Reichmuth matthew.r@americanmodular.com 209-825-1921	Bruce Mansell nspktor@comcast.net (707) 228-9300
<u>Student Restroom Upgrades Oak Grove School and Willowside School</u>	Replace in Kind	2017	\$262,906	\$0	Andrea Noble Steve Petcavich	N/A	de Rutte Builders Custom Plumbing Vern Butulia Tile Jeffcoat Painting Empire West Electric Santa Rosa Fire Equipment Pacific Coast Cutters HTI	
<u>Kitchen Upgrades at Oak Grove and Willowside and New Walk-in Freezer at Willowside</u>	Replace in Kind	2017	\$225,324	\$0	Andrea Noble Steve Petcavich	Wilson Architecture Norm Wilson (209) 577-0114 arcnorm@pacbell.net	Castino Restaurant Supply David Kay dkay@castinosolutions.com 707-480-8421	
<u>Reconditioned Modular Classrooms for Athletic Program at Willowside</u>	Sitework and Reconditioned Modulares	2017	\$231,279	\$15,109	Andrea Noble Steve Petcavich	Wilson Architecture Norm Wilson (209) 577-0114 arcnorm@pacbell.net	Impact Construction Services Rob Cronin rcronin@impactml.com (559) 366-6652	Bruce Mansell nspktor@comcast.net (707) 228-9300
<u>Lunch Shelter Willowside</u>	New Construction	2017	\$248,706	\$0	Andrea Noble Steve Petcavich	Wilson Architecture Norm Wilson (209) 577-0114 arcnorm@pacbell.net	Fieldstone Construction Gil Labrucherie gil.fieldstone@gmail.com 707-836-0669	Bruce Mansell nspktor@comcast.net (707) 228-9300
<u>Pre-Engineered Metal Storage Shed Building</u>	New Construction	2017	\$67,186	\$2,700	Steve Petcavich	Wilson Architecture Norm Wilson (209) 577-0114 arcnorm@pacbell.net	Fieldstone Construction Gil Labrucherie gil.fieldstone@gmail.com 707-836-0669	County PRMD





Jack London Elementary School, Piner-Olivet Union School District

**RGM and Associates** has provided Program and Construction Management services for the Piner-Olivet Union School District since 2003. During the long association, projects have consisted of new construction and modernization work, modular classroom installation, playground equipment, kitchen upgrades, maintenance and repair projects. RGM was the project manager for the construction of the Jack London Elementary School and the Piner-Olivet Charter School campus. RGMK is currently in the process of preparing a Facility Assessment and Maintenance Plan for the District, to include all five schools and the District Office.

### Piner-Olivet USD

3450 Coffey Lane  
Santa Rosa, CA 95403

#### School Sites:

- Schaefer Charter
- Jack London Elementary
- Piner Olivet Charter School
- Northwest Prep
- Olivet Charter

#### Client Contacts:

Jennie Snyder  
ED.D., Former Supt.  
jsnyder@scoe.org  
707-524-2786

Felicia Koha, CBO  
fkoha@pousd.org  
707-522-3008

#### Project Architects:

Quattrocchi Kwok Architects  
TLCD Architects  
Wilson Architecture

### Sebastopol Union School District

7611 Hendley Street  
Sebastopol, CA 94572

**Bond Program: \$4M**

#### School Sites:

- Parkside Elementary
- Brook Haven Middle
- Castle Pre-School / Childcare

#### Client Contacts:

Linda Irving  
Superintendent  
707-829-4570  
lirving@sebusd.org

#### Project Architect:

dsk Architects  
Amir Kakavand  
Principal  
amir@dskarch.com



Brook Haven Middle School, Sebastopol Union School District

**RGM and Associates** has provided Construction, Program and Management services for the John Swett Unified School District since 1998. Among other projects, RGM managed the demolition and replacement of the Brook Haven Middle School campus. After several years during which the District did not have a construction program, RGM is pleased to return to assist SUSD with its current program.

RGMK is in the unique position of providing Construction Management services to remodel a building for which it managed the construction, almost 20 years ago. Sebastopol Union is modernizing its former library and classroom building, turning it into a Multi-Use building including a kitchen and drama classroom. RGM provided planning services that included budget analysis, value engineering, and funding support, and is providing CM services during bid / award, construction, and close-out. RGM has also managed several small projects for the District, including HVAC and roofing projects, and has written a successful Facility Hardship grant that will offset some costs of the Brook Haven project.

**RGM and Associates  
Prior Relevant Experience**

PINER-OLIVET UNION SCHOOL DISTRICT 3450 COFFEY LANE SANTA ROSA, CA 95403								Felicia Koha, CBO fkoha@pousd.org 707-522-3008 Jennie Snyder, ED.D. Former Supt (now at SCOE) jsnyder@scoe.org 707-524-2786	
PROJECT NAME / LOCATION	PROJECT TYPE	PROJECT COMPLETED	VALUE	CO's	LEAD STAFF	ARCHITECT	CONTRACTOR	IOR	
<u>Facility Assessment and Deferred Maintenance Plan</u>	Facility Assessment	2020	N/A	N/A	Andrea Noble	N/A	N/A	N/A	
<u>Roofing Repairs and Replacement at Olivet School</u>	Foam Roofing Repair and Re-coat	2016	\$ 109,650	\$0	Andrea Noble	Robb Smith RGS Consulting, LLC 775-321-9887 RGSConsulting@iCloud.com	Foam Experts Roofing Brian Martin 480- 266-1959 foamroof@aol.com	N/A	
<u>Roofing Repairs and Replacement at Northwest Prep</u>	Foam Roofing Repair and Re-coat	2016	\$ 136,760	\$28,137	Andrea Noble	Robb Smith RGS Consulting, LLC 775-321-9887 RGSConsulting@iCloud.com	Foam Experts Roofing Brian Martin 480- 266-1959 foamroof@aol.com	N/A	
<u>Upgrade Student Restrooms at Schaefer School</u>	Replace in Kind	2015	\$ 169,438	\$16,550	Andrea Noble	N/A	deRutte Builders Mark deRutte 707- 483-6725 deruttebuilders@msn.com	N/A	
<u>Replace pocket tables at Olivet School and Northwest Prep</u>	Replace in Kind	2015	\$ 83,479	\$0	Andrea Noble	N/A	Interiors, Inc. deRutte Builders	N/A	
<u>VOIP Phone System (District-wide)</u>	Telecomm Project	2015	\$ 403,017	\$68,821	Andrea Noble	N/A	AMS.NET Joe Moomau jmoomau@ams.net 925-245-6100	N/A	
<u>Paint Schaefer School Campus</u>	Painting project	2014	\$ 68,800	\$0	Andrea Noble	N/A	Bella Painting Nikos Tsagarakis nicktsagarakis@sbcglobal.net 707-631-6601	N/A	
<u>Replace Flooring at Schaefer School</u>	Replace in Kind	2014	\$ 69,390	\$0	Andrea Noble	N/A	Conklin Bros, Inc. Wayne O'connor wayne@conklinbrosfloors.com 707-542-4983	N/A	

**RGM and Associates  
Prior Relevant Experience**

SEBASTOPOL UNION SCHOOL DISTRICT 7611 HUNTLEY STREET SEBASTOPOL, CA 94572							Linda Irving, Superintendent lirving@sebusd.org (707) 829-4570	
PROJECT NAME / LOCATION	PROJECT TYPE	PROJECT COMPLETED	VALUE	CO's	LEAD STAFF	ARCHITECT	CONTRACTOR	IOR
<u>Brook Haven Multi-Purpose Room Modernization and Addition</u>	Modernization and New Addition	2020	\$ 4 Mil	\$ 200 K (to date)	Andrea Noble	dsk Architects Amir Kakavand amir@dskarchitects.com 415-839-6418	Carr's Construction Serv 3165 Calistoga Road Santa Rosa CA 95404	John Stocksdale johnstocksdale@gmail.com 707-326-5130
<u>Compaction Grouting Project at Brook Haven Library / Classroom</u>	Soil Stabilization	2018	\$500,000	\$0	Andrea Noble Steve Petcavich	dsk Architects Amir Kakavand amir@dskarchitects.com 415-839-6418	The Pressure Grout Company pgc@pressuregrout.com 510-887-2244	John Stocksdale johnstocksdale@gmail.com 707-326-5130
<u>Roofing at Rooms 25-27 (Castle Childcare) and at Room 20 (Parkside Elementary)</u>	Roofing	2018	\$55,000	\$0	Andrea Noble	Robb Smith RGS Consulting, LLC 775-321-9887 RGSConsulting@iCloud.com	Foam Experts Roofing Brian Martin 480-266-1959 foamroof@aol.com	n/a
<u>HVAC Upgrades at the Main Building at Parkside School</u>	Replace in Kind	2017	\$109,900	\$0	Andrea Noble Steve Petcavich	dsk Architects Mike Heublein mike@dskarchitects.com 415-839-6418	FRC, Inc.	n/a
<u>Roof Repairs and Replacement at Parkside Childcare</u>	Repair and Replace	2017	\$36,900	\$8,235	Andrea Noble	Robb Smith RGS Consulting, LLC 775-321-9887 RGSConsulting@iCloud.com	Foam Experts Roofing Brian Martin 480-266-1959 foamroof@aol.com	n/a



Pope Valley School

**RGM and Associates** was selected by the Pope Valley Union Elementary School District to help guide the District's first construction program since the 1980's. RGM has been involved from the beginning of the program and has facilitated the selection of the Architect and consultants, and participated in Master planning, design and budget review, and the scheduling of project phases. Pope Valley is modernizing its existing buildings, adding new modular buildings to replace aging portables, and upgrading parking and drop off areas. RGM is providing guidance for the selection of the modular building manufacturer, the formal bid process for modernization and site improvements, the managing of the construction process, the successful close-out of projects, and planning for each next phase.

## Pope Valley Union ESD

6200 Pope Valley Road  
Pope Valley, CA 94567

**Bond Program: \$4M**

### School Site

Pope Valley Elementary Schools

### Client Contact

Ken Burkhart  
Teacher / Principal / Superintendent  
707-965-2402  
kburkhart@pvk8.org

### Project Architect:

**TLCD Architecture**  
Don Tomasi, Principal  
don.tomasi@tlcd.com

## West County Transportation Agency

367 West Robles Avenue  
Santa Rosa, CA 95407

**Facility/Site Expansion: \$9M**

### Client Contact

Chad Barksdale  
Executive Director  
707-206-9988, Ext. 230  
cbarksdale@westcountytransportation.org

### Previous Contact

Mike Rea  
Former Executive Director  
707-210-2182  
mikerea22@gmail.com

### Project Architect:

Glass Architects  
Eric Glass, Principal  
707-544-3920  
eglass@glassarchitects.com



West County Transportation Agency

**RGM and Associates** has provided Construction Management services to the West County Transportation Agency (a Joint Powers Authority with Participating School Districts) starting with their new Bus Maintenance, Parking and Refueling facility in 2001 and continuing with numerous other projects for more than 16 years. In 2016, the Governing Board of the 17-member Sonoma County school districts awarded RGM the Construction Management services for their new \$9M Site and Facility Expansion project. RGM has worked with the project team since conception of the project providing support throughout the planning phase. Construction of the \$3.3M Facility Expansion project began in 2018 and is being followed by the Site Expansion project which adds additional bus and staff parking, and a Compressed Natural Gas facility, on an adjacent site.

**RGM and Associates  
Prior Relevant Experience**

<b>POPE VALLEY UNION ELEMENTARY SCHOOL DISTRICT 6200 POPE VALLEY ROAD POPE VALLEY, CA 94567</b>						<b>Ken Burkhart, Teacher/Principal/Superintendent kburkhart@pvk8.org (707) 965-2402</b>		
PROJECT NAME / LOCATION	PROJECT TYPE	PROJECT COMPLETED	VALUE	CO's	LEAD STAFF	ARCHITECT	CONTRACTOR	IOR
<u>Phase 1 Modernization, including Prop 39 Upgrades</u>	Modernization	2018	\$2.34 Mil	\$ 107K	Andrea Noble Steve Petcavich	TLCD Architects Don Tomasi don.tomasi@tlcd.com 707-525-5600	Murray Building, Inc. P.O. Box 2201 Sonoma, CA 95476 (707) 939-9001 scott@murraybuildinginc.com	Rory Everitt roryeveritt@gmail.com
<u>Phase 1, Increment 2, New Modular Classroom Building</u>	New Modular Construction	2021	\$ 1 Mil		Steve Petcavich	TLCD Architects Don Tomasi don.tomasi@tlcd.com 707-525-5600	tbd	tbd
<u>Phase 2 Modernization of Administration Building, including parking and playground upgrades</u>	Modernization	tbd	tbd		Steve Petcavich	TLCD Architects Don Tomasi don.tomasi@tlcd.com 707-525-5600	tbd	tbd
<u>Phase 3 New Multi-Purpose Building</u>	New Construction	tbd	tbd		Steve Petcavich	TLCD Architects Don Tomasi don.tomasi@tlcd.com 707-525-5600	tbd	tbd



**RGM AND ASSOCIATES  
RELEVANT PROJECT EXPERIENCE**

**WEST COUNTY TRANSPORTATION AGENCY**  
367 West Robles Avenue  
Santa Rosa, CA 95407

Chad Barksdale, Executive Director  
cbarksdale@westcountytransportation.org (707)-206-9988, ext 230  
Mike Rea, Former Executive Director  
mikerea22@gmail.com (707) 210-2182

PROJECT NAME	PROJECT TYPE	PROJECT COMPLETED	VALUE	CO's	LEAD STAFF	ARCHITECT	CONTRACTOR	INSPECTOR
West Bus and Staff Parking Facility	New Construction	Start 2020	\$4,954,030 (Estimate)	TBD	Steve Petcavich / Matt Madeiros	Glass Architects Eric Glass (707) 544-3920	TBD	Sonoma County PRMD
Maintenance, Admin., Training, Driver Lounge	Additions & New Construction	Start 2018	\$3,577,650	(\$492,892.00)	Steve Petcavich	Glass Architects Eric Glass (707) 544-3920	Carrs Construction Services	Sonoma County PRMD
Operable Entry Gate	20' wide operable gate	2010	\$14,013	\$0.00	Greg Lykken	N/A	Coggins Fence	N/A
Radio Antenna Tower	30' Radio Antenna Tower	2010	(Sitework) \$9,868 (Equipment) \$10,712	\$0.00	Greg Lykken	N/A	Multi-Prime Contractors	Sonoma County PRMD
Free-standing Bus Wash Facility	Add a free-standing bus wash rack	2009	(Sitework) \$87,391 (Equipment) \$144,537	\$0.00	Greg Lykken	Wilson Architecture archnorm@pacbell.net	Multi-Prime Contractors	Sonoma County PRMD
Operations & Maintenance Facility Maintenance Building Build-out	New Construction	2003	\$1,269,068	\$144,068	Rich Dunlap	Glass Architects Mark DeBacker (707) 544-3920	A.E. Nelson Const. Rohnert Park, CA	Sonoma County PRMD



## FEES

RGM KRAMER, Inc. offers a full menu of program and management services. For general project planning and program support services, RGMK can provide services on a Time and Material basis under our current billing rate schedule.

### OPSC Fee Calculation Construction Management Fees

For the management of specific construction projects, RGMK provides comprehensive CM services based on the Office of Public-School Construction (OPSC) sliding fee schedule established under the Lease Purchase Program. This fee schedule is simply based on a percentage of the actual construction contracts managed. The fee covers preconstruction services, bidding and project management for single prime construction delivery method. Since the fee is based on a percentage of actual construction contracts managed, it does not require changes or adjustments during the project development process. Since this fee structure is based on a state developed guideline, it is easily defensible for school districts. This fee schedule is universal for all construction delivery models. The final fee is reconciled at the end of the project to the total value of construction contracts managed for the project on behalf of the District. RGMK can perform small project CM services on a flat rate of 8%, as warranted.

Construction contract value:	CM Fee
First \$500,000	8.0%
Next \$500,000	7.5%
Next \$1 Million	7.0%
Next \$4 Million	6.0%
Next \$4 Million	5.0%
Costs in excess of \$10 M	4.0%

For the Facilities Master Plan Update, RGMK staff will discuss the expectations of the District, and then provide a detailed, task-specific proposal for services related to the update of the Master Plan. RGMK will work with District staff and other stakeholders to develop a scope of work and a fee structure that works with the District's anticipated budget for the Master Plan update.

## RGM Kramer Inc.

### 2020 Billing rate schedule Effective January 1, 2020

The Above Rates include all taxes, insurance, health and welfare benefits, overhead and profit.

<u>CLASSIFICATION</u>	<u>RATE</u>
Principal Oversight	\$200.00
Program Manager / Project Executive	\$190.00
Sr. Construction Manager / Sr. Project Manager	\$175.00
Construction Manager / Project Manager	\$160.00
Estimator / Scheduler / Plan Reviewer	\$160.00
Contracts Manager	\$135.00
Assistant Project Manager / Project Engineer	\$120.00
Administrative Assistant	\$65.00
Clerical Support	\$55.00

Annual rate increases will be based on data provided by the Bureau of Labor Statistics, Consumer Price Index.

# EXAMPLES OF REPORTS

## Estimating

**PRELIMINARY - FOR DISCUSSION ONLY**

SUMMARY OF ESTIMATED COSTS  
 Unified School District  
 County: \_\_\_\_\_  
 PROJECT: Elementary  
**MASTER BUDGET**

DATE: PRELIMINARY X  
 PRE-FINAL  
 FINAL \$ 20,572,242

**RGMK**  
 RGM KRAMER INC.  
 Program & Construction Managers

APPLICATION NUMBER	BUDGET	ACTUAL
<b>A. DISTRICT / ADMINISTRATIVE FEES</b>	\$ 2,087,376.20	\$ 2,087,376.20
1. SITE ACQUISITION / APPRAISAL / TITLE	\$ 17,884.88	\$ 17,884.88
2. SURVEY	\$ 40,000.00	\$ 35,007.79
3. SITE SUPPORT - BOND FEES/FUNDING CONSULTANT/CD CONSULTANT	\$ 443,635.99	\$ 443,635.99
4. LEGAL FEES - (Attorneys)	\$ 72,500.00	\$ 72,500.00
5. OTHER (ER / Negative Declaration)	\$ 217,856.13	\$ 212,858.13
6. OTHER - PHASE I, GEO HAZARDS, PEA, ENVIRONMENTAL CLEARANCE	\$ -	\$ -
<b>SITE SUBTOTAL</b>	\$ 3,274,333.24	\$ 3,269,291.03
<b>B. PLANS</b>	\$ 1,298,808.00	\$ 1,190,752.01
1. ARCHITECTS FEE FOR PLANS	\$ 113,131.00	\$ 103,714.12
2. DSA PLAN CHECK FEE	\$ 4,523.00	\$ 4,302.12
3. DSA HANDICAPPED PLAN CHECK FEE	\$ 7,400.00	\$ 4,232.00
4. HEALTH DEPARTMENT	\$ -	\$ -
5. ENERGY ANALYSIS FEES	\$ 15,558.00	\$ 14,815.00
6. DEPARTMENT OF EDUCATION - Plan Check Fee	\$ 25,000.00	\$ 17,418.65
7. PRELIMINARY TESTS	\$ -	\$ -
A. SOILS	\$ -	\$ -
B. OPS & YR CONSULTANTS	\$ 25,000.00	\$ 4,132.95
C. BIDDING AND ADVERTISING	\$ -	\$ -
D. ENGINEERING CONSULTING	\$ 14,486.00	\$ 14,486.00
E. HAZARDOUS MATERIAL SURVEY / SPECS	\$ 102,600.00	\$ 102,600.00
8. LABOR COMPLIANCE PROGRAM ADMINISTRATIVE COSTS	\$ 1,666,556.00	\$ 1,463,702.85
<b>PLANS SUBTOTAL</b>	\$ 1,298,808.00	\$ 1,190,752.01
<b>C. CONSTRUCTION</b>	\$ 89,551.81	\$ 89,551.84
1. UTILITIES	\$ -	\$ -
A. UTILITY SERVICE FEES	\$ -	\$ -
B. UTILITY SERVICE IMPROVEMENTS	\$ -	\$ -
2. OFF-SITE DEVELOPMENT	\$ -	\$ -
3. SERVICE SITE DEVELOPMENT	\$ 441,235.12	\$ 441,235.12
4. GENERAL SERVICE SITE DEVELOPMENT	\$ 3,500,000.00	\$ 266,404.55
5. GAS STATION ABATEMENT/DEMOUNT/REMOVAL	\$ 19,855,600.00	\$ 19,728,017.42
6. DEMOLITION - INTERIM HOUSING	\$ -	\$ -
7. NEW CONSTRUCTION	\$ -	\$ -
A. UNCONVENTIONAL ENERGY SOURCES	\$ -	\$ -
B. SPECIAL ACCESS COMPLIANCE	\$ 130,000.00	\$ 114,200.00
C. TECHNOLOGY ALLOWANCE	\$ 30,000.00	\$ 23,603.00
9. ENVIRONMENTAL ABATEMENT	\$ 1,148,533.65	\$ 1,148,533.65
10. AIR MONITOR CLEARANCE	\$ -	\$ -
11. PROJECT MANAGEMENT - RGM	\$ 50,000.00	\$ 50,000.00
12. OTHER (ITEMIZE)	\$ -	\$ -
A. REMEDIATION/GENERAL CONDITIONS	\$ -	\$ -
B. MOVING/STORAGE (Direct Expense)	\$ 22,074,920.61	\$ 21,861,545.61
C. UNDERGROUND UTILITY SEARCH	\$ 223,495.00	\$ 223,495.00
<b>CONSTRUCTION SUBTOTAL</b>	\$ 89,551.81	\$ 89,551.84
<b>D. TESTS (CONSTRUCTION LAB)</b>	\$ -	\$ -
<b>E. INSPECTION (RGM)</b>	\$ 397,435.00	\$ 355,465.00
<b>F. FURNITURE AND EQUIPMENT</b>	\$ 450,000.00	\$ 427,190.70
<b>G. CONTINGENCIES</b>	\$ 1,825,613.50	\$ -
<b>H. TOTAL ESTIMATE COSTS (ITEMS A THROUGH H)</b>	\$ 20,572,242.13	\$ 20,697,695.19

\* These cost have been included in the new construction budget (C7)

**ELEMENTARY ACCOUNT SUMMARY SHEET # 1 PLANS**

ANNA

ACCOUNT	DEBIT	CREDIT	BALANCE
10000			
10100			
10200			
10300			
10400			
10500			
10600			
10700			
10800			
10900			
11000			
11100			
11200			
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18900			
19000			
19100			
19200			
19300			
19400			
19500			
19600			
19700			
19800			
19900			
20000			

## Budgets

**City School District Construction Estimate Summary**

School: City School Upper Campus Date: 10/21/2014

**RGMK**  
 RGM KRAMER INC.  
 Program & Construction Managers

Description	RGM	Bidder 1	Bidder 2	Bidder 3	Avg - GCs
Division 01 - General Requirements	\$ 1,277,248	\$ 990,600	\$ 820,250	\$ 788,120	\$ 659,323
Division 01.5 - Overlap/Acceleration Allowance	\$ 549,579	\$ 100,000	\$ -	\$ -	\$ 216,526
Division 02 - Existing Conditions	\$ 579,848	\$ 140,000	\$ 784,917	\$ 259,217	\$ 394,711
Division 03 - Concrete	\$ 1,785,799	\$ 2,040,271	\$ 2,037,302	\$ 1,847,492	\$ 1,975,022
Division 04 - Masonry	\$ 29,200	\$ -	\$ 6,000	\$ 190,300	\$ 66,953
Division 05 - Metals	\$ 4,478,440	\$ 2,544,547	\$ 3,302,053	\$ 4,000,820	\$ 3,283,484
Division 06 - Wood, Plastics, Composites	\$ 221,000	\$ 249,168	\$ 225,317	\$ 696,457	\$ 381,314
Division 07 - Thermal and Moisture Protection	\$ 1,268,510	\$ 1,488,000	\$ 1,200,040	\$ 1,390,688	\$ 1,360,243
Division 08 - Openings	\$ 1,599,480	\$ 1,800,500	\$ 2,145,635	\$ 2,387,341	\$ 2,111,159
Division 09 - Finishes	\$ 2,093,968	\$ 3,757,203	\$ 3,645,421	\$ 4,730,209	\$ 4,047,308
Division 10 - Specialties	\$ 155,119	\$ 179,000	\$ 339,961	\$ 251,826	\$ 256,029
Division 11 - Equipment	\$ 314,325	\$ 203,000	\$ 140,933	\$ 295,890	\$ 213,274
Division 12 - Furnishings	\$ 399,480	\$ 585,698	\$ 173,983	\$ 196,977	\$ 378,619
Division 13 - Special Construction - Not Used	\$ -	\$ -	\$ -	\$ -	\$ -
Division 14 - Covering Systems	\$ 128,000	\$ 110,000	\$ 109,500	\$ 152,500	\$ 124,000
Division 21 - Fire Suppression	\$ 300,000	\$ 330,000	\$ 384,549	\$ 396,812	\$ 391,454
Division 22 - Plumbing	\$ 671,000	\$ 805,000	\$ 729,062	\$ 785,627	\$ 706,583
Division 23 - HVAC	\$ 1,750,000	\$ 1,580,000	\$ 1,518,979	\$ 1,206,428	\$ 1,456,130
Division 26 - Electrical	\$ 1,691,816	\$ 2,000,000	\$ 1,432,751	\$ 1,717,341	\$ 1,716,697
Division 27 - Communications	\$ 904,480	\$ -	\$ 522,668	\$ 737,699	\$ 420,217
Division 28 - Electronic Safety & Security	\$ -	\$ -	\$ 262,844	\$ -	\$ 87,615
Division 31 - Earthwork	\$ 320,900	\$ 356,000	\$ 602,585	\$ 1,296,261	\$ 776,942
Division 32 - Exterior Improvements	\$ 1,690,295	\$ 1,697,330	\$ 2,376,202	\$ 2,736,295	\$ 2,209,842
Division 33 - Utilities	\$ 643,435	\$ 360,456	\$ 390,137	\$ 676,399	\$ 476,330
<b>Construction Subtotal</b>	<b>\$22,564,719</b>	<b>\$ 21,535,552</b>	<b>\$ 23,430,956</b>	<b>\$ 26,776,875</b>	<b>\$23,912,461</b>
Insurance	\$ 269,093	\$ 216,091	\$ 114,475	\$ 287,709	\$ 199,412
Risk	\$ 33,219	\$ 54,013	\$ 61,177	\$ 29,860	\$ 48,023
Bonds	\$ 143,962	\$ 106,025	\$ 157,008	\$ 180,772	\$ 148,001
Contractor's Overhead & Profit - FEE	\$ 805,191	\$ 619,098	\$ 925,523	\$ 743,561	\$ 782,723
GC Contingency	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Recommended Construction Budget</b>	<b>\$24,840,214</b>	<b>\$ 23,532,727</b>	<b>\$ 24,689,137</b>	<b>\$ 27,991,797</b>	<b>\$25,671,220</b>
Total Sq. Ft.	60,235	55,350	60,000	60,000	59,453
\$/Sq. Ft.	\$ 395.77	\$ 388.10	\$ 411.49	\$ 466.53	\$ 421.70
Design Contingency	\$ -	\$ -	\$ -	\$ -	\$ -
Construction Contingency	\$ 780,000	\$ 780,000	\$ 780,000	\$ 780,000	\$ 780,000
Market Fluctuation	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Recommended Project Budget</b>	<b>\$24,660,214</b>	<b>\$ 23,292,727</b>	<b>\$ 25,469,137</b>	<b>\$ 28,751,797</b>	<b>\$26,451,220</b>
Total Sq. Ft.	60,235	55,350	60,000	60,000	60,000
\$/Sq. Ft.	\$ 409.38	\$ 398.68	\$ 426.07	\$ 479.20	\$ 432.52

**City School District Construction Summary Estimate**

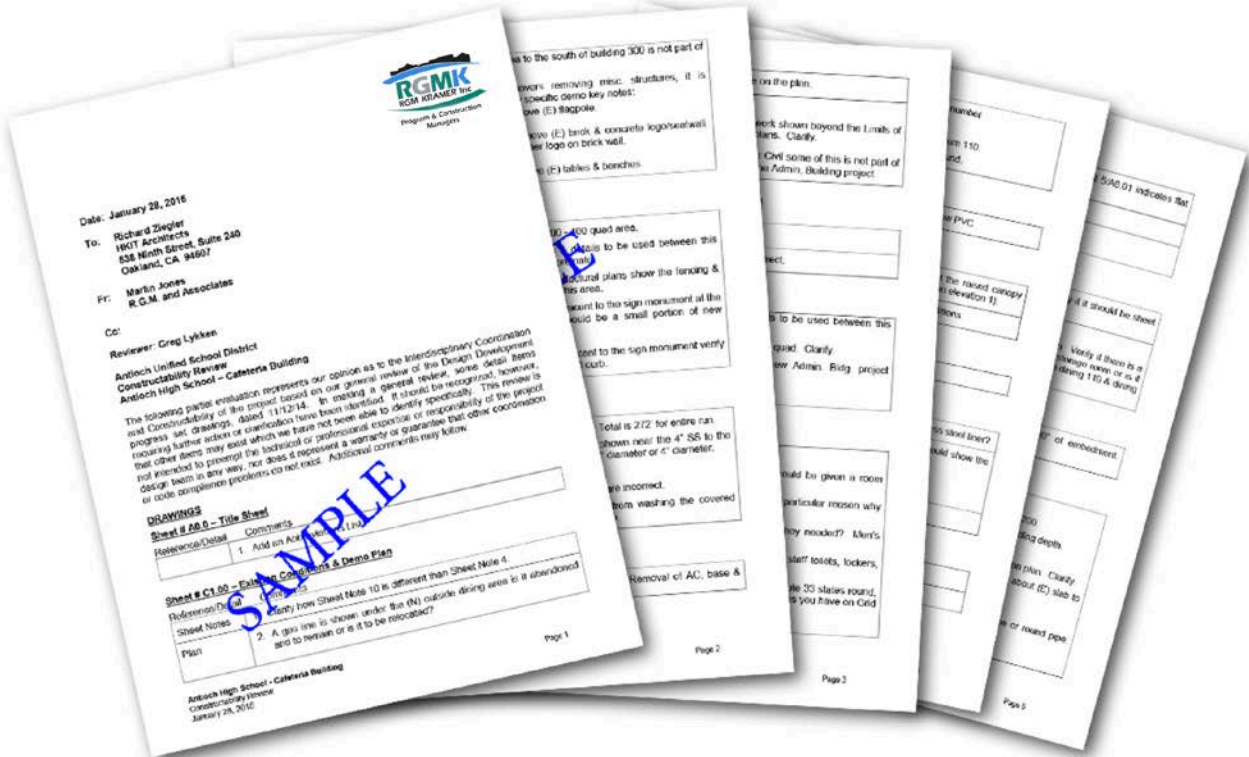
Location: Upper Campus  
 Facility: Campus Park  
 Estimator: Jull Bazyar  
 Date: 10/21/2014

Estimate Type: DSA Subtotal  
 Facility SF: 60,235.00  
 Cost Per SF: 409.38

Description	QUANTITY	UNIT	UNIT COST	TOTAL
DIVISION 2 - EXISTING CONDITIONS				\$ 2,087,376.20
DIVISION 3 - CONCRETE				\$ 1,785,799.00
DIVISION 4 - MASONRY				\$ 29,200.00
DIVISION 5 - METALS				\$ 4,478,440.00
DIVISION 6 - WOOD AND PLASTIC				\$ 221,000.00
DIVISION 7 - THERMAL AND MOISTURE PROTECTION				\$ 1,268,510.00
DIVISION 8 - FINISHES				\$ 2,093,968.00
DIVISION 9 - SPECIALTIES				\$ 155,119.00
DIVISION 11 - EQUIPMENT				\$ 314,325.00
DIVISION 12 - FURNISHINGS				\$ 399,480.00
DIVISION 13 - SPECIAL CONSTRUCTION - NOT USED				\$ -
DIVISION 14 - COVERING SYSTEMS				\$ 128,000.00
DIVISION 21 - FIRE SUPPRESSION				\$ 300,000.00
DIVISION 22 - PLUMBING				\$ 671,000.00
DIVISION 23 - HVAC				\$ 1,750,000.00
DIVISION 26 - ELECTRICAL				\$ 1,691,816.00
DIVISION 27 - COMMUNICATIONS				\$ 904,480.00
DIVISION 28 - ELECTRONIC SAFETY AND SECURITY				\$ -
DIVISION 31 - EARTHWORK				\$ 320,900.00
DIVISION 32 - EXTERIOR IMPROVEMENTS				\$ 1,690,295.00
DIVISION 33 - UTILITIES				\$ 643,435.00
<b>TOTAL for Classroom Wing and MP</b>				<b>\$22,564,719.00</b>
General Contingency				\$ 269,093.00
General Liability Insurance			0.00%	\$ -
Builders Risk Insurance			0.00%	\$ -
Bond - Subcontractors (Special Set, Steel and MEP)			0.00%	\$ -
Subtotal				\$ 23,912,461.00
GC Fees			0.75%	\$ 180,772.00
Subtotal				\$ 24,093,233.00
Contingency - Design Phase (Based on Total for CR Wing and MP)			0.00%	\$ -
<b>GRAND TOTAL</b>				<b>\$ 24,093,233.00</b>

# EXAMPLES OF REPORTS

## Constructability



## Scheduling

