



Magnolia Public Schools

Audit/Facilities Committee Meeting

Date and Time

Wednesday April 12, 2023 at 6:00 PM PDT

Location

Home Office: 250 E. 1st Street, Suite 1500, Los Angeles CA 90012

Access to the Board Meeting

Any interested parties or community members from remote locations may attend the meeting at any Magnolia Science Academy school, or the addresses where Board Members are joining from. Dialing information is included below:

By dialing into; 1-669-444-9171

Meeting ID: 922 0564 0153 - **Passcode:** 013089

Zoom: <https://zoom.us/j/92205640153?pwd=cHNIWjlnY0dsQmxDTjZFa0pydzR0Zz09>

- Magnolia Science Academy-Santa Ana - 2840 W. 1st Street, Santa Ana, CA 92703 (Mr. Mekan Muhammedov)

Accessibility

In compliance with the Americans with Disabilities Act (ADA) and upon request, Magnolia Public Schools may furnish reasonable auxiliary aids and services to qualified individuals with disabilities. Members of the public who need special accommodations or translation are strongly encouraged to contact Magnolia Public Schools at least 24 hours in advance of the Board meeting so assistance can be assured. Please contact Jennifer Lara at 213-628-3634 or email jlara@magnoliapublicschools.org with such requests.

Any public records relating to an agenda item for an open session which are distributed to all, or a majority of all, of the Board Members shall be available for public inspection.

Public Comment Procedures

Magnolia Public Schools greatly values public comment during Board meetings. For members of the public who would like to speak, please fill out the Public Speaker Form which can be accessed at magnoliapublicschools.org, there will also be speaker cards to be filled out prior to the beginning of the meeting. By law, the Board is only allowed to discuss or take action on items listed on the agenda. The Board may, at its discretion, refer a matter to MPS staff or add the issue to a future board meeting date for discussion. Public speakers are limited to three (3) minutes and speakers with interpreters up to six (6) minutes.

Please note that the agenda item times for when that item will be discussed or taken action on is subject to change on the day of the Board meeting to accommodate public speaker times indicated above. For any questions regarding this meeting please email board@magnoliapublicschools.org or call (213) 628-3634 ext. 21101.

Audit/Facilities Committee Members

Mr. Mekan Muhammedov, Chair

Ms. Diane Gonzalez

Mr. Daniel Sheehan

Dr. Salih Dikbas (alternate)

CEO and Superintendent

Mr. Alfredo Rubalcava

Agenda

	Purpose	Presenter	Time
I. Opening Items			6:00 PM
Opening Items			
A. Call the Meeting to Order			1 m
B. Record Attendance and Guests			1 m
C. Approval of Agenda	Vote		1 m
D. Public Comments			3 m
E. Approval of Minutes from MPS Regular Audit/Facilities Committee Meeting - February 2, 2023	Approve Minutes		1 m

	Purpose	Presenter	Time
II. Recommended Action Items			6:07 PM
A. Approval of Construction Manager for the Property at 7111 Winnetka Ave for the CSFP Project	Vote	Patrick Ontiveros	30 m
III. Closing Items			6:37 PM
A. Adjourn Meeting			1 m

Coversheet

Approval of Minutes from MPS Regular Audit/Facilities Committee Meeting - February 2, 2023

Section: I. Opening Items
Item: E. Approval of Minutes from MPS Regular Audit/Facilities Committee Meeting - February 2, 2023
Purpose: Approve Minutes
Submitted by:
Related Material: Minutes for Audit/Facilities Committee Meeting on February 2, 2023

APPROVED



Magnolia Public Schools

Minutes

Audit/Facilities Committee Meeting

Date and Time

Thu Feb 2, 2023 at 6:00 PM

Location

<https://zoom.us/j/92205640153?pwd=cHNIWjlnY0dsQmxDTjZFa0pydzR0Zz09>

Meeting ID: 922 0564 0153 **Passcode:** 013089

One tap mobile: +16699009128,,92205640153# US (San Jose)

Audit/Facilities Committee Members

Mr. Mekan Muhammedov, Chair

Ms. Diane Gonzalez

Mr. Daniel Sheehan

Dr. Salih Dikbas (alternate)

CEO and Superintendent

Mr. Alfredo Rubalcava

Committee Members Present

D. Gonzalez (remote), M. Muhammedov (remote)

Committee Members Absent

D. Sheehan

I. Opening Items**A. Call the Meeting to Order**

M. Muhammedov called a meeting of the Audit/Facilities Committee Committee of Magnolia Public Schools to order on Thursday Feb 2, 2023 at 6:02 PM.

B. Record Attendance and Guests

Refer to attendance information recorded above.

C. Approval of Agenda

D. Gonzalez made a motion to approve the agenda as presented.
M. Muhammedov seconded the motion.
The committee **VOTED** to approve the motion.

Roll Call

D. Gonzalez Aye
D. Sheehan Absent
M. Muhammedov Aye

D. Public Comments

No public comments were made at this time.

E. Approval of Minutes from MPS Regular Audit/Facilities Committee Meeting - December 6, 2022

D. Gonzalez made a motion to approve the minutes from Audit/Facilities Committee Meeting on 12-06-22.
M. Muhammedov seconded the motion.
The committee **VOTED** to approve the motion.

Roll Call

M. Muhammedov Aye
D. Sheehan Absent
D. Gonzalez Aye

F. Approval of Minutes from MPS Regular Audit/Facilities Committee Meeting - January 11, 2023

D. Gonzalez made a motion to approve the minutes from Audit/Facilities Committee Meeting on 01-11-23.
M. Muhammedov seconded the motion.
The committee **VOTED** to approve the motion.

Roll Call

D. Gonzalez Aye
D. Sheehan Absent
M. Muhammedov Aye

II. Recommended Action Items

A. Approval of Resolutions Related to the Acquisition and Lease of 16600 Vanowen Street

This phase is related to signing the purchase and sale agreement and right to take title to the recently formed Vanowen Street LLC. Magnolia Science Academy (MSA)-2 is presently on a Los Angeles Unified School District (LAUSD) site under a co-location use agreement which is set to expire in 2024. After that time, MPS would have to apply for a Prop 39 space for MSA-2. The intended use of the Vanowen Street property is to provide a facility for MSA-2 once their co-location use agreement expires. P.Ontiveros, General Counsel & Director of Facilities explained the transaction process as well as the studies currently and previously administered for a conditional use permit for the site. S.Budhreja, Chief Financial Officer, went over the financial health of the school and organization to move forward. Committee Members questions were asked and addressed by staff.

M. Muhammedov made a motion to approve the following actions: (1) the assignment by MPS to MPM 16600 Vanowen Street LLC (the "Vanowen Street LLC") of all its right, title and interest in and to that certain agreement for the purchase of the property located at 16600 Vanowen Street (APNs: 2231-007-008, -016 and -017) (the "Vanowen Street Property") including the right to take title to the Property and the good faith deposit made by MPS; (2) the execution by the MPS CEO, CFO or their designees, of a lease agreement by and between MPS and Vanowen Street LLC (the "Lease") for the use and occupancy of the Vanowen Street Property by Magnolia Science Academy—2 ("MSA-2"); (3) under the Lease, the payment by MPS to Vanowen Street LLC of non-refundable advanced rent in an amount equal to approximately \$3,100,000, consisting of (i) \$400,000 from the assignment of the good faith deposit made by MPS to escrow for the Vanowen Street Property and (ii) approximately \$2,700,000 in cash; (4) the execution by the MPS CEO, CFO or their designees, on behalf of Vanowen Street LLC, as its sole manager of such documents and instruments as may be necessary in order for Vanowen Street LLC to acquire the Vanowen Street Property, including any loan documents; and (5) the execution by the MPS CEO and Superintendent, CFO, or their designees, of such documents and instruments as may be necessary to undertake and complete the foregoing actions. Staff recommends and moves that the MPS Committee recommend and move that the MPS Board adopt the foregoing resolutions.

D. Gonzalez seconded the motion.

The committee **VOTED** to approve the motion.

Roll Call

M. Muhammedov	Aye
D. Gonzalez	Aye
D. Sheehan	Absent

III. Closing Items

A. Adjourn Meeting

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 6:15 PM.

Respectfully Submitted,
M. Muhammedov

Coversheet

Approval of Construction Manager for the Property at 7111 Winnetka Ave for the CSFP Project

Section: II. Recommended Action Items
Item: A. Approval of Construction Manager for the Property at 7111 Winnetka
Ave for the CSFP Project
Purpose: Vote
Submitted by:
Related Material:
II_A_Construction Manager for the Property at 7111 Winnetka Ave for the CSFP Project.pdf



Agenda Item:	II A: Recommended Action Item
Date:	April 12, 2023
To:	Magnolia Educational & Research Foundation dba Magnolia Public Schools (“ MPS ”) Audit & Facilities Committee (the “ Committee ”)
From:	Alfredo Rubalcava, CEO & Superintendent
Staff Lead(s):	Patrick Ontiveros, General Counsel & Director of Facilities Mustafa Sahin, Project Manager
RE:	Approval of Erickson-Hall Construction to Provide Construction Management and Multi-Prime Delivery for the Magnolia Science Academy—5 (“ MSA-5 ”) New Construction Project at 7111 Winnetka Street

1. **Action Proposed:**

MPS Staff recommends that the Audit and Facilities Committee approve the selection of Erickson-Hall Construction (“**EH**”) to provide construction management services for MSA-5’s new construction project at 7111 Winnetka Ave in Winnetka (the “**Project**”) based on a multi-prime delivery method for a total fee of \$3,850,000 (\$3,784,607 *plus* \$65,393 contingency) and further approve that MPS Staff be authorized to negotiate and sign a professional services contract for said services in such form as MPS Staff may deem appropriate and in the best interests of MPS. Furthermore, for the Committee to approve and recommend that the Board adopts the same.

2. **Purpose:**

The purpose of this proposed action is to approve the selection of EH to provide construction management services for the Project and to deliver the Project under a construction management multi-prime delivery method and to authorize MPS Staff to negotiate a final contract with EH. The Project will be funded with the proceeds of a Charter School Facilities Program (“**CSFP**”) award from the Office of Public School Construction (“**OPSC**”).

3. **Background:**

Acquisition of Winnetka Ave Property

At its December 19, 2021 meeting, the MPS Board approved MPS signing a purchase and sale agreement (“PSA”) for the purchase of the 7111 Winnetka Ave Property and making a good faith, refundable, escrow deposit of Two Hundred Thousand Dollars (\$200,000). Escrow for the purchase and sale of the Property was opened on December 22, 2021. MPS exercised all three (3) of its options to extend the contingency period. At its June 16, 2022 meeting the Board approved the waiver of the contingencies. At the June 16th meeting the Board also approved a loan from CLI Capital to fund the acquisition of the Property.



MPS assigned to MPM Sherman Winnetka LLC (“Winnetka LLC”) the right to acquire and take title to the Property with a loan from CLI Capital. Winnetka Ave LLC is a subsidiary of Magnolia Properties Management, Inc., a 501(c)(3) support corporation. Concurrent with the foregoing assignment, MPS entered into a lease for the Property with Winnetka Ave LLC. Escrow on the Property closed on October 21, 2022.

CSFP Award

MPS Staff applied for funding to the OPSC’s CSFP program during the application period held from May 2nd to June 3rd. CSFP provides funding to charter schools for new school facilities. On October 26, 2023, the State Allocation Board (“SAB”) approved a preliminary apportionment in the amount of . Awards made by CSFP are 50% loan and 50% grant. The loan portion is paid back by the award recipient and is amortized over 30 years.

The CSFP award will be used to construct a new campus for MSA-5 which is currently co-located with MSA-1 on MSA-1’s campus. MPM Sherman Winnetka LLC, a wholly owned subsidiary of Magnolia Properties Management, Inc., a 501(c)(3) support organization, closed on the property located at 7111 Winnetka Ave for the purpose of constructing and leasing a new campus to MSA-5.

Architect of Record Selection

The DLR Group was selected as the architect of record for the Project at the Board’s January 12, 2023 meeting. Current design schematics are attached as Exhibit A.

Construction Management RFP

Staff issued an RFP for construction management services on March 1, 2023, with an addendum issued on March 6, 2023 (collectively, the “**RFP**”). The RFP was sent to several construction management companies and was also posted on the MPS website. A copy of the RFP is attached as Exhibit B. The RFP proposes a phased delivery approach with classroom space being delivered in August 2024 in time for the 2024-25 school year and the balance of the Project, including the gymnasium, being delivered in August 2025.

Construction Management RFP Responses

Staff received a total of four (4) proposals from AJS, Erickson-Hall Construction (“**EH**”), Gafcon, and Neff Construction, Inc. The proposals are summarized below.



	AJS	Erickson-Hall	Gafcon	Neff
Scope of Services Proposed	CM	CM-MP	CM	CM-MP
Total Fee*	\$221,500.00	\$3,784,607.00 [†]	\$1,310,300.65	\$3,460,528.00 [‡]
Type	Fixed	Fixed	Fixed	Estimate
Staffing	1	4 (during construction 4 full-time and one part-time)	4 (1 full time and 3 part-time)	7 (unclear how many full-time)

Notes:

* The total fee for CM-MP services consists of “general conditions” plus a fee on construction (similar to a general contractor’s profit and overhead fee)

[†] EH’s fee on construction is 3.75%

[‡] Neff’s fee on construction is 4.5%

MPS Staff formed a selection committee to screen the respondents. Based on the written responses received and responses from reference checks, the team interviewed EH. After careful consideration, including further due diligence, MPS Staff determined that EH was the best fit for the Project including but not limited to the following reasons: team composition and staffing, breadth of experience with State funded school projects, quality of RFP response, history of working with the Project architect, DLR Group, and attention to schedule and budget. Erickson-Hall’s response to the RFP is attached as Exhibit C. The other three (3) responses may be found with this link.

Construction Management with Multi-Prime Delivery

Of the four (4) responses received, two (2) proposed to act as construction manager with a multi-prime delivery method (aka “CM-MP”). With the CM-MP delivery method, there is no general contractor. The CM acts in the role of the general contractor but is an agent of the owner and bids out all the trades—steel, HVAC, fire life safety, etc. In this way the CM and the ownership have more control over the selection of the trade vendors. Moreover, with a CM-MP delivery method the CM’s fees are locked in and the CM will be part of the team from the outset of the project advising as to how best to design the project in order to meet critical timeline and budgetary constraints. For example, a CM can work with the ownership to order long lead time materials. Moreover, a CM MP will not charge a fee on top of a trade contractor’s change order.

The typical delivery method is design-bid-build where the architect designs the project and it is submitted for plan check, the approved plans are bid out, and then a general contractor is selected. The general contractor chooses the subcontractors for its bid. A common complaint about the design-bid-build process is that the ownership must accept the lowest responsive bid regardless of the composition of the general contractor’s subcontractor team composition.

A CM-MP delivery method is attractive and appropriate for the Project for the following reasons:



- Avoid duplicative and additional costs. If MPS hires a CM and then general contractor MPS will pay a CM fee on top of a general contractor fee. The general contractor fee is typically 5% of construction costs and the general contractor will collect a fee on top of the subcontractor's fee. Here, EH's fee on the construction is 3.75%. MPS will lock in their lump sum fee such that it will not go up based on change orders.
- EH identified the target construction costs. If MPS bids out to general contractors MPS will not have any transparency.
- There is a risk that at bid time MPS could end up with a less than desirable general contractor. When you get hard bids for general contractors you have to choose the lowest responsive bid. Low up front bids are usually followed by significant change orders. To quote one reference I spoke to: "You have no say in who you work with." In turn, an unknown general contractor could lead to delays that MPS can ill afford.
- EH has done a lot of work with DLR and so there is a synergy that may be difficult to replicate.
- EH, on MPS's behalf, can bid out different trades at different times allowing us to save time. Otherwise, we will rely on the general contractor and will not bid out until final DSA approval.
- MPS could still hire another CM or PM to play the role that Gafcon played on the gym project at Santa Ana at the time of construction.

4. **Analysis & Impact:**

MSA-5 is presently co-located on MSA-1's campus. With a combined student population of approximately 1,000 students the site is highly congested. Due to space limitations, both MSA-1 and MSA-5 are constrained in accepting more students. Prior to its move to the MSA-1 campus, MSA-5 was located on prop 39 Los Angeles Unified School District campuses. The Project will allow MSA-5 to occupy its own facilities on a permanent basis.

Staff believes that a CM-MP delivery will ultimately save costs by avoiding unnecessary mark-ups and duplicative expenses.

5. **Budget Implications:**

All costs related to the Project, including construction management fees, will be paid for with the proceeds from the CSFP award. Therefore, there should be no impact on MSA-5's budget. As the design further develops

6. **Committee Recommendations:**

(Only applicable if presented to a Committee before going to the Board. If item is not brought to a committee then delete section. Otherwise, this is reserved to be completed by Jen.)



7. **Exhibits:**

- Exhibit A Schematics
- Exhibit B RFP
- Exhibit C Erickson Hall RFP Response



EXHIBIT A

DLR Group Schematics



SOUTHEAST CORNER



NORTHEAST CORNER



MAGNOLIA
SCIENCE ACADEMY **5**

GOOD
MORNING
STUDENTS

EAST FACADE



SOUTHWEST ENTRANCE



MAIN DROPOFF



OUTDOOR SPORTS



COURTYARD AERIAL

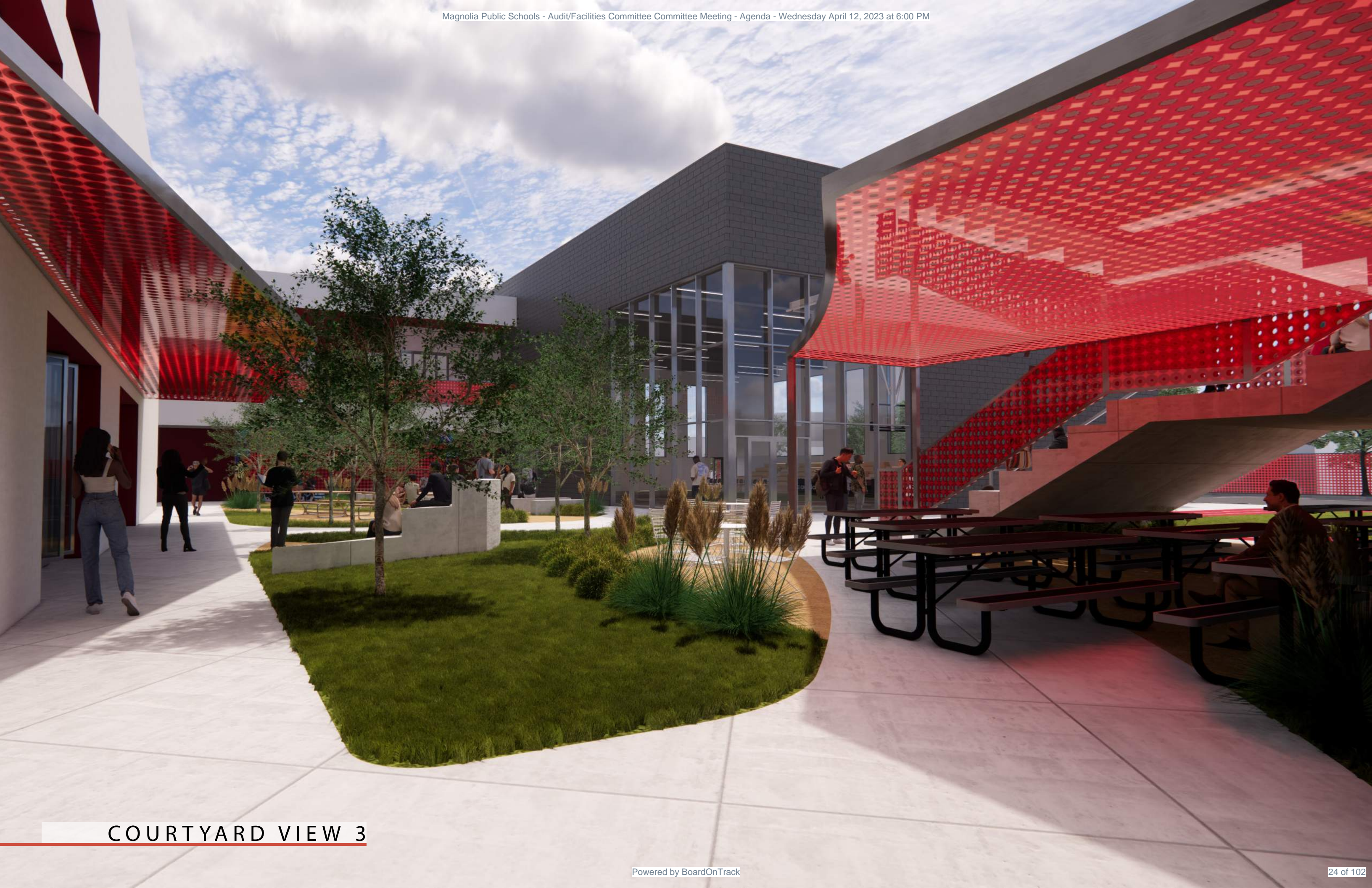




COURTYARD VIEW 1



COURTYARD VIEW 2



COURTYARD VIEW 3



COURTYARD VIEW 4



COURTYARD VIEW 5



COURTYARD VIEW 6



COURTYARD VIEW 7



EXHIBIT B

Construction Management RFP



REQUEST FOR QUALIFICATIONS/ PROPOSALS

MAGNOLIA SCIENCE ACADEMY 5

PRE-CONSTRUCTION AND CONSTRUCTION MANAGEMENT SERVICES FOR CHARTER SCHOOL STATE FUNDED MIDDLE & HIGH SCHOOL NEW CONSTRUCTION PROJECT

Posted
March 1, 2023

Submit Responses To:
Mustafa Sahin
Facility Project Manager
Magnolia Public Schools

RFQ/P Due Date:
March 14, 2023

No Later Than 5:00 P.M.

MAGNOLIA EDUCATIONAL & RESEARCH FOUNDATION
250 EAST 1ST STREET, SUITE 1500
LOS ANGELES, CA 90012

Magnolia Educational & Research Foundation dba Magnolia Public Schools (“**Magnolia**”) is requesting Proposals for Construction Management Services for work associated with pre-construction and construction management services, bidding and construction of a new two story classroom building, gymnasium and associated site work for Magnolia Science Academy 5, an existing 6-12 charter school in Reseda, California (the “**Project**”). The project address is 7111 Winnetka Avenue, Winnetka, Ca. Magnolia will pay for the Project with the proceeds from an award from the State Allocation Board and the Office of Public School Construction under the “Charter School Facility Program.”

The purpose of this Request for Qualifications/Proposals (“**RFQ/P**”) is to obtain information that will enable Magnolia to select a Construction Management firm (“**CM**”) that can assist with the Project, including providing input on the current design and assisting in the procurement of long lead items and in the management of the construction of new facilities. Each Construction Management firm responding to this RFQ/P should be prepared and equipped to provide comprehensive pre-construction and construction management services on behalf of Magnolia in an expeditious and timely manner to enable Magnolia to meet critical time deadlines and schedules. DLR Group is providing design and engineering services for the Project and is the Architect of Record (“**AOR**”). Magnolia desires to achieve occupancy of classrooms by August 2024 and expects that the Project will be phased, with Phase I consisting of the construction of the classroom building by August 2024 and Phase II, consisting of the balance of the campus (including the gymnasium), by August 2025. The Project is more fully described below under Section II.

Magnolia issues this RFQ/P in compliance, with Section 4529.5 of Chapter 10, Division 5 of the Government Code which states that “[a]ny individual or firm proposing to provide construction project management services pursuant to this chapter shall provide evidence that the individual or firm and its personnel carrying out onsite responsibilities have expertise and experience in construction project design review and evaluation, construction mobilization and supervision, bid evaluation, project scheduling, cost-benefit analysis, claims review and negotiation, and general management and administration of a construction project.” Accordingly, Magnolia is requesting proposals from qualified firms to provide comprehensive, professional pre-construction and construction management services in accordance with the information and criteria set forth herein. Extensive California public school experience and knowledge of the State process is sought from candidates submitting proposals in response to this RFQ/P, in addition to other criteria and qualifications as set forth herein.

Proposals shall be in accordance with the “Format for Proposal Submission” as set forth in Section II, below, and must be submitted to the attention of Mustafa Sahin via email by no later than 12:00 pm on March 10, 2023.

In order to allow Magnolia Public Schools to make an informed decision regarding the selection of a consultant among responsible and responsive candidates, the proposal must contain the following elements or evidence that the firm meets or exceeds the requirements stated herein.

I) **SCOPE OF WORK**

A) **GENERAL & PRE-CONSTRUCTION PHASE**

- 1) Work with Magnolia’s staff, AOR, consultants, general contractors, sub-contractors and all other required vendors for the successful completion of a State of California funded project submitted

to the Division of the State Architect (“**DSA**”) within the City of Los Angeles jurisdiction;

- 2) Partner with Magnolia and DLR Group, and their respective consultants, to refine the Project scope in order to allow occupancy by the desired dates within the desired budget;
- 3) Procure long lead items on behalf of Magnolia;
- 4) Assist with obtaining all State, City and Local permits in a timely and expeditious manner, including but not limited to CDE, SAB, OPSC, and LADBS; and
- 5) Work with Magnolia in the coordination and quality control of all project documentation. Prepare progress/status reports for cost, schedule, quality, etc. Reports are required throughout the duration of the Project to be submitted on monthly basis (or as needed) for review by the Magnolia.

B) BID/AWARD CONSTRUCTION MANAGEMENT PHASE

- 1) Assist Magnolia in its efforts to generate local bidder participation in the construction program;
- 2) Develop and issue project specifications and general conditions in cooperation with AOR and Owner’s Authorized Representative;
- 3) Coordinate and conduct, in conjunction with Magnolia and its AOR, project pre- bid conference(s);
- 4) Coordinate with Magnolia and its consultant(s) to document and formally respond to bidder inquiries. Work with the AOR to issue addendum documents for bid packages, when necessary. Advise Magnolia of cost, schedule and construction impacts resulting from the inclusion of addendum documents for bid packages;
- 5) Assist Magnolia and Magnolia’s AOR in the issuance of the Notice of Award and Notice to Proceed for each construction contract.

C) CONSTRUCTION MANAGEMENT PHASE

- 1) Consultant and assigned personnel shall be fully experienced in the coordination of construction projects utilizing identified construction delivery methodologies;
- 2) In conjunction with Magnolia and Magnolia’s AOR, coordinate and conduct project pre-construction conferences;
- 3) Consultant and assigned personnel shall work with Magnolia and its AORs to insure existence and maintenance of complete files of all project documentation which shall include but not be limited to the following: design documents, estimates, bid documents, construction contracts, payment invoices, requests for information (“**RFIs**”), contractor’s submittals and shop drawings, change orders, claims, schedules, and correspondence;

- 4) Serve as Magnolia's representative along with other consultants, including Magnolia's AOR and inspectors, for the administration of the construction contract(s) as provided under the General Conditions for the Project. When appropriate, make recommendations to Magnolia for exercising Magnolia's prerogatives under the construction contract(s) for the Project;
- 5) Implement and coordinate Magnolia's construction standards. Consultant and its assigned personnel shall adopt standard procedures for document control and formats as identified for the documents including, but not limited to, bid documents, contract documents, payment invoices, schedules, program status reports, requests for information ("**RFIs**"), change orders, claims, etc. The consultant, working with Magnolia and its AOR, must assist with the development and maintenance of a cost loaded project schedule detailing all project activities and implement logging and tracking of all project related information, including, but not limited to, contracts, payments, correspondence, and cost worksheet data;
- 6) Attend all regular job-site progress meetings, distribute meeting minutes, unless otherwise noted or agreed to by Magnolia or its other consultants and representative(s);
- 7) Along with the AOR and Owner's Authorized Representative, coordinate activities with inspectors, consultants, testing labs, and other technical inspection and agencies as needed. File and distribute as appropriate all inspection reports;
- 8) Receive and review the Contractor's detailed cost-loaded baseline construction schedule for conformance to the contract requirements. Receive and review the Contractor's detailed "Schedule of Values" for front end loading and compliance with contract requirements. Distribute the approved schedule to Magnolia, Magnolia's AOR, and other involved parties;
- 9) Utilize the Contractor's approved baseline schedule and schedule of values to establish, update, maintain and distribute the project schedule;
- 10) Receive and review the Contractor's monthly schedule update and progress payment request. Review and confirm monthly Contractor payment requests with Magnolia AOR and inspectors, as needed. Review the progress of construction and observe work in place and stored materials, and evaluate the percentage complete of each activity shown on the contractor's construction schedule. Identify with the contractor any current or potential delay(s) to the completion schedule, and require appropriate contractor corrective action, including submittal of recovery schedule(s), where appropriate or advisable. Review certified payroll and verify compliance with applicable (e.g., administrative) guidelines, as requested or directed by Magnolia, and the financing institution;
- 11) Work with Magnolia's AOR in the evaluation of contractor change order proposals ("**Change Orders**") for time and price, and make recommendations for Magnolia action. Assist Magnolia and the AOR in the negotiation of Change Order cost and time extensions, and requirements for documenting Change Orders, and document packaging pertaining to Change Orders. Provide project cost estimating, as requested by Magnolia;

- 12) Prepare, file, and distribute Project Status Reports as requested by Magnolia. Prepare and distribute logs reflecting status of Change Orders, claims, contractor submittals, shop drawings and RFIs;
- 13) Perform a claim entitlement analysis of all contractor claims, including but not limited to, an analysis of the impact on cost(s) and project schedule, and prepare recommendations to Magnolia and the AOR regarding appropriate action and response to contractor claims. If requested by Magnolia, negotiate claims from the Contractor on the behalf of Magnolia, including recommendations concerning settlement, in conjunction with and subject to recommendations of Magnolia legal consultants;
- 14) Coordinate the receipt and storage of Magnolia-furnished, contractor installed materials and equipment;
- 15) Assist and coordinate with the AOR and inspectors, as needed, to prepare a "punch list" of items pending substantial and final completion of a project(s). Verify to Magnolia and Magnolia's AOR the contractor(s) completion and corrective action for each punch-list items, and recommend actions in event of contractor's failure to take corrective action or other necessary actions relative to said punch list;
- 16) Schedule, coordinate and assist Magnolia in the occupancy of the completed Project or portions thereof.

D) CONTRACT CLOSE-OUT

- 1) In association with Magnolia's AOR and Authorized Representative, receive and review operations and maintenance manuals, and warranties and guarantees as required under the contract provisions.
- 2) In association with Magnolia's AOR and Authorized Representative, receive and review project record drawings and as-builts, and assist the AOR and Contractor in the filing of these documents with Magnolia. (Note: Format of record drawings to be determined for each project, usually hard copy plus AutoCAD and PDF).
- 3) Coordinate and schedule training sessions for Magnolia personnel, and verify that the Contractor's obligations are fulfilled.
- 4) Make a final review of the Project(s) in conjunction with Magnolia's AOR and Authorized Representative at the conclusion of all corrective action. Provide a report to Magnolia indicating whether the work is acceptable under the contract documents (including any addenda or change orders), and recommend final payment and the recordation of a notice of completion in conjunction with Magnolia's AOR and other Magnolia representatives or staff.
- 5) Assist Magnolia and Magnolia's AOR in the preparation and submittal of the final project accounting and closeout report(s) including (but not limited to) all City of Los Angeles, California

Department of Education (“**CDE**”) and State Allocation Board (“**SAB**”)/Office of Public School Construction (“**OPSC**”) forms as may be required or needed.

E) POST CONSTRUCTION FOLLOW-UP

- 1) Provide Magnolia and Magnolia’s AOR with one (1) year post construction follow- up for Contractor warranty and guarantee items.

II) PROJECT DESCRIPTION

The scope of the Project is the construction of a new campus for MSA-5 at 7111 Winnetka Ave. A map and the ALTA and topographic survey may be accessed via this [link](#). Magnolia will use the proceeds of an award from the State of California under its Charter School Facilities Program (“**CSFP**”) to construct a new two story building, gymnasium, outdoor learning areas, and all associated site work, offsite improvements and utility service installation as required. Details of the award may be accessed via this [link](#). While the award is for \$50.8 M, approximately \$10 M will be used for acquisition, and approximately \$3.5 M will be used for soft costs, leaving \$37.3 M for hard costs. DLR Group has been selected as the AOR and has completed schematic design. The DLR schematics may be accessed via this [link](#).

Magnolia desires to occupy the Project in time for the 2024-25 school year. Magnolia understands that it will likely have to phase the Project. Phase I is expected to consist of classroom space only to allow occupancy by August 2024. Phase II is expected to consist of the balance of the Project and be completed by August 2025.. The CM will work closely and collaboratively with Magnolia and DLR to meet these goals.

Magnolia expects that, if construction on Phase I is completed by August 2024 then the balance of the Project will be constructed while school is in session. The selected CM will be required to assist coordinating the construction activities.. Provisions might include but are not limited to fencing off the construction area off to ensure proper safety, delineate site access and delivery routes, define staging areas and protect the existing structures, maintain access to the fire lane and the adjacent public alleyway. The CM firm shall determine and provide a special conditions section that deals with these specific issues.

III) FORMAT FOR PROPOSAL SUBMISASION

A) GENERAL INSTRUCTIONS

All proposals are to be submitted in compliance with the format set forth below and in the order as outlined to facilitate evaluation by Magnolia of the candidate’s ability to meet or exceed the specified requirements under the heading “Scope of Work.”

The proposals shall be presented in a bound 8-1/2 inch by 11-inch (vertical) format. Submit three (3) hard copies and one (1) electronic copy in PDF format via email of each proposal. The electronic copy may be submitted via email while the hard copies may be delivered within a couple days thereafter as set forth herein. All submittals shall become the property of Magnolia and will not be

returned.

Clarifications or questions regarding submittals must be submitted in writing to Mustafa Sahin, via email to msahin@magnoliapublicschools.org. Please include the name of your firm and telephone number when making inquiries. All proposals are due no later than March 10, 2023, 5:00 p.m.

SPECIAL NOTE: Individuals and firms responding to the RFQ/P are cautioned to not contact school Board Members, Magnolia leadership, staff or existing consultants without the express permission of Mustafa Sahin or Patrick Ontiveros. Failure to observe these criteria could potentially result in disqualification.

B) FORMAT REQUIREMENTS:

The sequence to be followed is as follows:

1. Cover Page
 - a. Name of Firm
 - b. Project Title – Proposal for Construction Management Services, MSA 5 School Building Project
 - c. Date Submitted
2. General Information
 - a. Name, address, telephone, and e-mail address of firm, name and email for contact persons.
 - b. License number, type of license, State of license or registration;
 - i. Legal form of firm (i.e. corporation, partnership, etc.).
Please state the year your firm or organization was established;
 - ii. Number and names of principals in the firm;
 - iii. Number of employees;
 - c. A short resume of your firm's principals, including registrations/licenses and State (Please limit to one page per person);
 - d. Short resume of key personnel to be assigned to the Project, included position. Please limit to one page per person, with each resume containing the following information:
 - i. Project-specific responsibilities and description of work to be performed;
 - ii. Estimated percentage of the individual's time that will be devoted to the project;
 - iii. Specific qualifications;
 - iv. Years with the firm;
 - v. Number of projects of similar nature performed by subject of resume;
 - vi. Position held and responsibilities on work of similar nature; and,
 - vii. Education, licenses held, qualification, etc.
3. Provide information to show that your proposed team has suitable resources available to ensure satisfactory completion of the work.
4. Experience in new public school construction projects, highlighting any CSFP funded projects.

Please provide a minimum of five (5) completed individual projects.

5. Provide a list of at least three (3) references, including names, addresses, telephone and e-mail addresses of all contact persons with respect to projects which your firm or its senior personnel has worked on within the last ten (10) years, and any other references you wish to provide who may provide information to Magnolia regarding your firm's qualifications. List the project's owner and contractors for each reference. Please be advised that references will be contacted.
6. Describe recent projects; ideally, public works or K-12 school projects, performed within the last five (5) years for which your firm or its senior personnel provided Construction Management Services. State the estimated project cost (include design, construction and administration) versus actual cost for these Projects. Provide all information regarding change orders or other construction cost adjustments relative to each project listed. Describe in full the services provided by your firm.
7. Please indicate experience your firm has with respect to the following:
 - a. Construction phasing plan
 - b. Information Technology
 - c. Value Engineering
 - d. Schedule Management
 - e. Pre-Construction
 - f. Construction
 - g. Phasing around existing facilities
 - h. Budget Management
 - i. Experience with the following: the City of Los Angeles Department of Building and Safety (LADBS); Los Angeles City Planning; Los Angeles Department of Transportation (LADOT); Los Angeles Department of Water and Power (LA DWP); City of Los Angeles Public Works Department, Bureau of Engineering (BOE); Los Angeles Fire Department; and other applicable city departments and agencies.
 - j. Constructability Reviews
 - k. Estimating Services
8. Briefly describe how your team would plan to work with Magnolia and their other consultants, representatives and/or agents as consultant in the following areas:
 - a. Team work. Describe what tactics you will use to strengthen working relationships between the architect, engineers, contractors, consultants and Magnolia staff.
 - b. Assisting architect and/or engineering firms in public contract compliance (especially with respect to remaining within budget, adhering to schedules, and with respect to project deliverables).
 - c. Construction phasing to coincide with facility needs.
 - d. Handling changes needed during any of the above phases.
 - e. Claims response, participation in advising mitigation of adverse (or potentially adverse) impacts, and dispute resolution (identify type, e.g., arbitration, mediation, etc.)
 - f. Managing and coordinating the public works bidding process.
 - g. Interfacing with multiple state level and governmental agencies departments.

9. Briefly describe how your firm develops and monitors accurate project design and construction schedules, financial budgets, and cost estimates. Please include methods and philosophy for cost control and change order management for both design and construction phases, as well as construction claims dispute resolution.
10. Insurance Coverage. Each submittal must include a copy of the respondent's Certificate of Insurance. This may be marked confidential and included with the proposal. The firm or organization shall be required to carry the following insurance with Magnolia named as Additional Insured:
 - a. Comprehensive General Liability and Property Liability Insurance, with a minimum limit two million dollars (\$2,000,000);
 - b. Comprehensive Automobile Liability Insurance, including owned, non-owned, and hired vehicles with minimum limit of one million dollars (\$1,000,000);
 - c. Workers' Compensation and Employer Liability, statutory limit;
 - d. Professional Liability Insurance with minimum one million dollars (\$1,000,000) per claim per annual aggregate. Deductible not to exceed \$25,000 each claim; and
 - e. Such other insurance as Magnolia may reasonably request.

Note: All insurance must be issued by an insurance provider by an admitted carrier (licensed to do business in the State of California), carrying a rating of not less than A-VII in the most current A. M. Best's Insurance Guide - Property Casualty or otherwise acceptable to Owner.

11. Provide a complete list of construction related litigation within the past five (5) years involving your firm. Indicate whether your firm or any predecessor firm has filed for protection under the United States bankruptcy code within the last seven (7) years. If so, provide the name of the court where filed, the case title, and the disposition of the case.
12. Include additional brochures, promotional information as desired and attach to the preceding information, which you feel may assist Magnolia in evaluating your proposal.

ALL RESPONSES MUST BE RECEIVED BY 5:00 PM, MARCH 14, 2023

Proposals must be concise, straightforward, and must address each requirement and question.

Magnolia reserves the right to negotiate modifications with any firm as may be required to serve the best interests of Magnolia and to negotiate the final contracts with the most qualified candidates.

All proposals will become the property of Magnolia. Information in Proposals will become public property and subject to disclosure laws. Magnolia reserves the right to make use of any information or ideas in the proposals. All proposals will be maintained as confidential working papers until officially placed on the School Board meeting agenda.

Magnolia reserves the right to reject any and all proposals and to waive any informality in any proposal received. No obligation, either expressed or implied, exists on the part of Magnolia to make an award or to pay any costs incurred in the preparations or submission of a proposal. All costs associated with the preparation or submission of proposals for this RFQ/P is solely the responsibility of the candidates.

IV) BUDGETARY ESTIMATE FOR FEES:

- A) Provide the hourly rate for each proposed job classification, and any others that may become necessary due to additional services.
- B) Provide a fully loaded fee schedule for construction management services for the project as detailed in Section II, Project Description. Please provide an estimate and breakdown of reimbursable expenses.

V) Evaluation of Proposals and Recommendation

- A) Process: All RFQ/P responses will be read and evaluated by a committee of Magnolia home office staff. Overall responsiveness and representations made within the RFQ/P, as well as your firm's ability to connect with the MPS team are important factors in the overall evaluation process. MPS will select a firm that has the highest suitability for the Project and the overall desirable approach.
- B) Award: Magnolia reserves the right to reject any and all proposals; to waive any informality in the proposal process; and to accept the proposal that appears to be in its best interests. Staff will make a recommendation to the Board of Directors to award a contract to the selected Vendor. The Board of Magnolia Public Schools will vote to award the contract at its ad hoc committee or regularly scheduled meeting.
- C) Questions and Submission: Please feel free to direct questions to Mustafa Sahin, Project Manager, by email, as shown below, or Patrick Ontiveros, Director of Facilities and Real Estate at pontiveros@magnoliapublicschools.org.

All proposals are due no later than 5:00 pm March 14, 2023 via email as indicated below. Please deliver three (3) hard copies in care of the MERF home office address by March 16, 2023 no later than 5:00 pm as follows:

Mustafa Sahin
c/o Magnolia Education & Research Foundation
250 E 1st Street, Suite 1500
Los Angeles, CA 90012 msahin@magnoliapublicschools.org



REQUEST FOR QUALIFICATIONS/ PROPOSALS

MAGNOLIA SCIENCE ACADEMY 5

**PRE-CONSTRUCTION AND CONSTRUCTION MANAGEMENT SERVICES FOR
CHARTER SCHOOL STATE FUNDED MIDDLE & HIGH SCHOOL NEW CONSTRUCTION
PROJECT**

Amendment No. 1 to RFQ/P Dated March 1, 2023

Posted
March 6, 2023

The purpose of this Amendment No. 1 to the RFQ/P posted on March 1, 2023 by Magnolia Educational & Research Foundation dba Magnolia Public Schools (“**Magnolia**”) is to clarify that electronic responses are due by 5:00 PM March 14, 2023 and not March 10, 2023. Hard copies may follow two days thereafter by 5:00 PM March 16, 2023

Clarifications or questions regarding submittals must be submitted in writing to Mustafa Sahin, via email to msahin@magnoliapublicschools.org. Please include the name of your firm and telephone number when making inquiries.

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Mustafa Sahin
c/o Magnolia Education & Research Foundation
250 E 1st Street, Suite 1500
Los Angeles, CA 90012
msahin@magnoliapublicschools.org



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Mustafa Sahin
c/o Magnolia Education & Research Foundation
250 E 1st Street, Suite 1500
Los Angeles, CA 90012
msahin@magnoliapublicschools.org



EXHIBIT C

Erickson-Hall Construction RFP Response

QUALIFICATIONS TO PROVIDE PRECONSTRUCTION & CONSTRUCTION MANAGEMENT SERVICES MAGNOLIA SCIENCE ACADEMY 5

MARCH 14, 2023



Erickson-Hall Construction
An Employee Owned Company

500 Corporate Drive
Escondido, CA 92029
RFQ Contact: Rachael Gonzalez
rgonzalez@ericksonhall.com
760.796.7700 p | 760.796.7750 f

QUALIFICATION TO PROVIDE

PRECONSTRUCTION & CONSTRUCTION MANAGEMENT SERVICES

MAGNOLIA SCIENCE ACADEMY 5


MARCH 14, 2023

1. **Cover Letter**
2. **General Information**
3. **Resources**
4. **Charter School Project Experience (CSFP)**
5. **References**
6. **K-12 Project Experience**
7. **Services Approach**
8. **Project Specific Methodology & Approach**
9. **Budget**
10. **Insurance**
11. **Litigation**
12. **Additional Information**

1. Cover Letter



Erickson-Hall Construction
An Employee Owned Company

 build on our reputation

LETTER OF INTEREST

March 14, 2023

Mustafa Sahin
Facilities Project Manager
Magnolia Public Schools
250 East 1st Street, Suite 1500
Los Angeles, CA 90012

RE: **Request for Qualifications/Proposal - Preconstruction & Construction Management
Magnolia Science Academy 5**

Erickson-Hall is pleased to submit our qualifications to provide construction management services to Magnolia Public Schools. With more than \$1.5 billion of California K-12 school projects completed to date, we are recognized as a Southern California industry leader. We offer our clients wide-ranging expertise in all areas critical to the successful delivery of program and construction management services.

Founded in 1998 by Dave Erickson and Michael Hall, Erickson-Hall is an employee-owned, Southern California-based construction manager and licensed general contractor. Our firm's primary focus is modernization and new construction of California K-12 schools. We offer comprehensive experience and expertise working with DSA, as well as working with site staff to ensure construction activities are not disruptive to campus operations.

Justin Sinnott, Vice President joined Erickson-Hall in 2014. He is a Certified Construction Manager and will serve as your Project Executive. Justin will lead an energized, collaborative team effort focused on identifying and implementing the most cost-conscious approach, methods and materials to maximize construction funds and achieve project goals and objectives. He will be supported by a team of seasoned construction professionals offering an unwavering commitment to partnering with you, our client, DLR Group, consultants and contractors.

Our team will serve as a resource to Magnolia Public Schools and DLR Group by providing timely input on existing site conditions, cost and schedule impacts, constructability issues and value engineering opportunities as we develop/validate project budgets and construction schedules. Throughout construction phases we will carefully monitor the level of quality delivered by contractor forces while ensuring Magnolia Public Schools remains a good neighbor to surrounding communities. Working on any school campus requires a diligent commitment to jobsite safety, as well as "safety beyond the construction fence."

We are confident that Magnolia Public Schools will value our commitment to partnering with our clients and project stakeholders, teaming for project success. Thank you for considering Erickson-Hall. Our team is assembled and ready to go to work!

Respectfully,




Mat Gates
President

2. General Information



Erickson-Hall Construction
An Employee Owned Company

 build on our reputation

GENERAL INFORMATION

Corporate Summary

Founded in 1998 by David Erickson and Michael Hall, Erickson-Hall is an employee-owned, full service construction manager and licensed general contractor providing comprehensive preconstruction, construction and post-construction phase services utilizing a variety of alternative delivery processes, including CM, CM Multi-Prime, Lease-Leaseback, and Design Build. We have successfully completed more than \$1.5 billion of school construction. Our team of seasoned construction professionals offer comprehensive experience and expertise in managing design and construction activities from design concept through DSA close-out for new construction and modernization of K-12 school facilities.

Erickson-Hall is a financially sound organization and has the resources to operate all business operations without the need to rely upon a line of credit. For at risk projects, we offer a per project bonding capacity of \$150 million and an aggregate bonding capacity of \$400 million. Our annual volume exceeds \$230 million.

Collaboration

An opportunity to serve our clients comes with every project. Experience has demonstrated that we have the greatest impact on a project when we collaborate with the owner and the design team during a project's early stages. Overall project success - whether optimizing value, controlling costs, meeting aggressive schedules or all of the above, relies not only on our professional capabilities, but also on our collaborative approach to specific project challenges. Our track record of past projects demonstrates that we have worked effectively side-by-side with districts, educators, design teams and state agencies to meet goals, needs and expectations.

We are committed to serving as a resource to owners and their design teams by providing timely input on cost and schedule impacts as multiple design alternatives evolve into final design solutions. Collaborative interaction of our seasoned construction professionals throughout all phases of design helps to ensure projects achieve established goals. Once construction is underway, we use state-of-the-art technology for supervision of daily construction activities, subcontractors and trade contractors

Erickson-Hall offers the depth and experience of a large, national contractor while providing the personal attention clients expect from a locally owned construction company. More than two decades of achievement comes from longstanding relationships with clients, design professionals and trade partners.

Justin Sinnott will be your Project Executive overseeing the collaboration process for the Magnolia Science Academy project. He is headquartered out of our Los Angeles/Orange County Office and can be contacted 24/7 for any project needs that arise.

Justin Sinnott, CCM
Vice President, Project Executive
c. 760.703.4083
jsinnott@ericksonhall.com

Firm Information

- A California Corporation
- David Erickson, Founding Principal | CEO
- Michael Hall, Founding Principal | COO
- Mat Gates | President
- David Jeffrey | CFO
- 24 Years in Operation
- 180 Employees

License Requirements

CA Contractor's License No. 751343

- A (General Engineering)
- B (General Building)
- Hazardous Substance Removal Certification

Office Locations

- [Corporate Headquarters](#)
500 Corporate Drive
Escondido, CA 92029
760.796.7700 p | 760.796.7750 f

- [Riverside County Office](#)
11810 Pierce Street, Unit 150
Riverside, CA 92505
951.358.0738 p

- [Los Angeles / Orange County Office](#)
12600 Westminster Avenue, Suite D
Santa Ana, CA 92706
714.532.1060 p

// *Services performed will be delivered from our Los Angeles/ Orange County Office with support from corporate headquarters.*

- [Imperial Valley Office](#)
216 E. 3rd Street
Imperial, CA 92251
760.355.1564 p



DSA/Regulatory Agency Review & Approvals

Since Erickson-Hall's 1998 inception, we have been actively building education projects in strict compliance with DSA code requirements. Our portfolio of DSA regulated projects exceeds 1,000 projects with project values ranging from \$75,000 to \$60,000,000. We offer comprehensive experience and expertise assisting owners in obtaining necessary reviews and approvals from various regulatory agencies, including but not limited to Office of the State Fire Marshall, Division of the State Architect, California Department of Industrial Relations (elevator inspections), local health departments, local utility providers, and the Coastal Commission. We understand the various forms required, as well as the review process for each entity. As a result of our extensive construction experience and engagement during these inspections, we also can identify areas of concern in the design, well before submission to the approval agency. Our ability to communicate project parameters effectively and proactively will streamline and head off any questions or concerns well in advance of required approval dates.

Current Staff Workload

Erickson-Hall will perform all construction management services with in-house construction professionals. Every team member assigned to Irvine Unified School District is currently working on an education project regulated by DSA and is well-positioned to join the District team once a project has been awarded to our firm.

PROJECT DELIVERY METHODS & SERVICES

- CM-Multiple Prime
- CM Agency
- CM-at-Risk
- Program/Project Management
- Lease-Leaseback
- Design-Build
- Design-Bid-Build

PRECONSTRUCTION PHASE SERVICES

- Planning & Needs Assessment
- Program Integration
- State Agency Coordination & Support
 - » California Department of Education (CDE)
 - » State Allocation Board (SAB)
 - » Office of Public School Construction (OPSC)
 - » Division of the State Architect (DSA)
 - » Occupational Safety & Health Administration (OSHA)
 - » California Occupational Safety & Health Administration (Cal-OSHA)
- Site Selection Analysis
- Design Activity Coordination
- Budget Development
- Schedule & Phasing Development
- Constructability Reviews
- Building Information Modeling (BIM)
- Value Engineering Analyses
- Bid Packaging
- Contractor Bidding

CONSTRUCTION PHASE SERVICES

- Team Communication
- Schedule Execution
- Safety Program Implementation
- Quality Assurance/Quality Control
- Commissioning
- DSA Close-out Assistance
- Operations & Maintenance Manuals

Key Personnel

Erickson-Hall offers a team of seasoned in-house construction professionals who offer comprehensive experience and expertise in managing design and construction activities from design concept through DSA close-out for new construction and modernization of school facilities throughout Southern California. Our team members understand how to execute complex construction on occupied school campuses without causing disruption to learning environments while ensuring the constant safety of students, faculty staff and campus visitors. Every Erickson-Hall employee assigned to District projects has the experience and expertise necessary to ensure projects are delivered within established cost and schedule goals.

All construction management services will be provided by in-house construction professionals; therefore, no consultant or subcontractor resumes have been included with our submission.

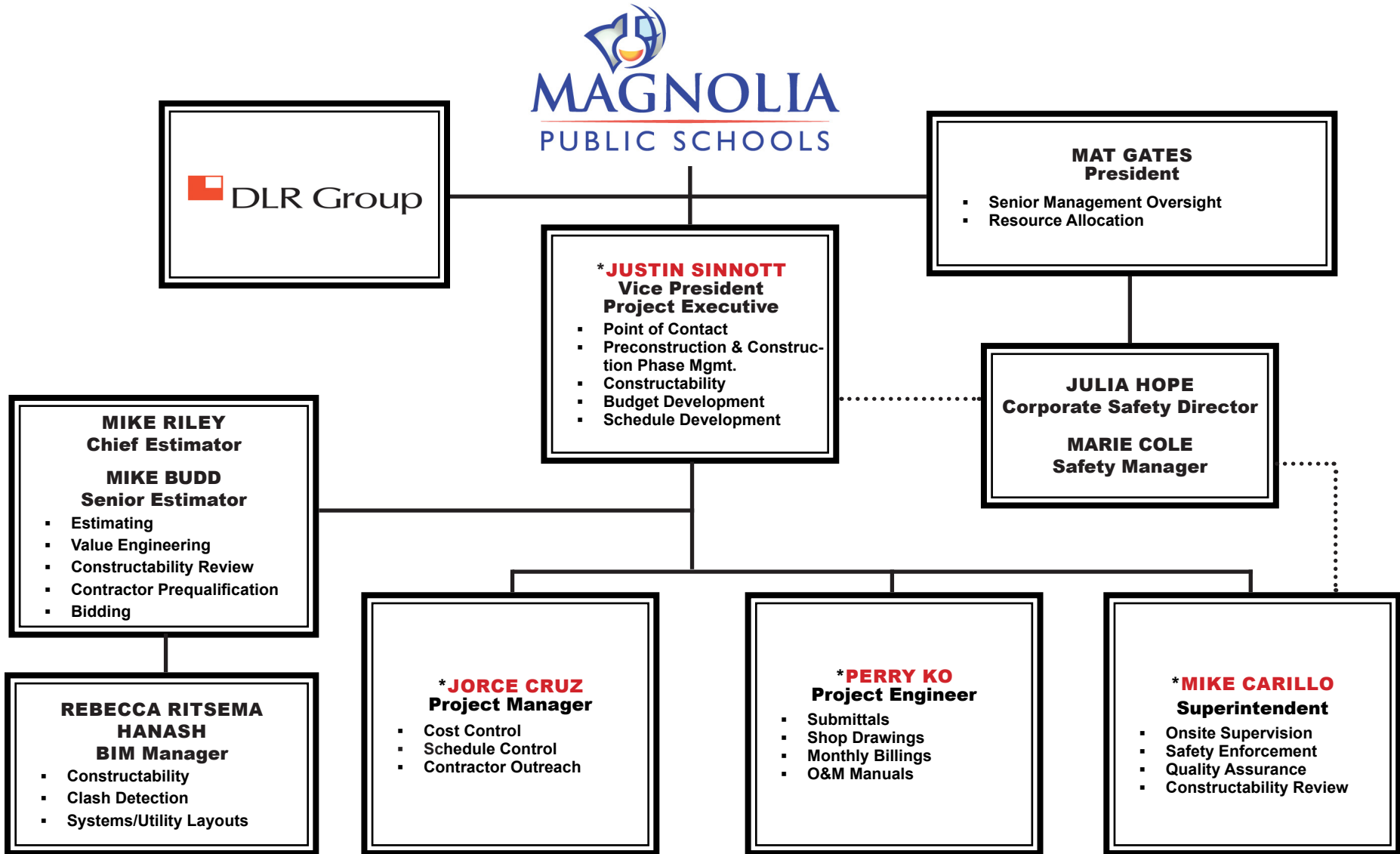
Our proposed Magnolia Science Academy Construction Management Team is listed below. Every team member is fully qualified, experienced and properly licensed/certified (as applicable) to perform the construction management services assigned to them. An organizational chart along with team member resumes are provided in this section.

- Justin Sinnott, Vice President, Project Executive **(2017 CASH Leadership Academy Graduate)**
- Jorge Cruz, Project Manager
- Perry Ko, Project Engineer
- Mike Carrillo, Superintendent



YOUR TALENTED ERICKSON-HALL CONSTRUCTION CO. TEAM

ORGANIZATIONAL CHART



*Primary Team Members

PROJECT TEAM - RESUMES

EDUCATION

B.S. Structural Engineering
Jacobs School of Engineering
University of California, San Diego

CERTIFICATIONS

- Certified Construction Manager
- 2017 CASH Leadership Academy Graduate

TRAINING

- Concrete & Masonry
- Confined Spaces Awareness
- OSHA 30-Hour
- OSHA Lead Awareness
- CPR | AED | First Aid
- Heat Illness
- Asbestos Awareness
- Personal Protective Equipment Awareness
- SWPPP
- Leadership Development Training
- Defensive Driver Training

REFERENCES

David Miranda
Executive Director
Long Beach Unified School District
562.997.7555

Vince Madsen
Senior Director, Facilities Planning
Downey Unified School District
562.469.6707

Nancy Nien
Former Assistant Superintendent,
Business Service
Los Alamitos Unified School District
Current Assistant Superintendent,
Business Service
Anaheim Union High School District
714.999.3555

JUSTIN SINNOTT, CCM

Vice President, Project Executive (Primary Contact)

Justin Sinnott, a Certified Construction Manager, joined Erickson-Hall in 2014. His construction industry career spans 20 years of modernization and new construction of California K-12 school facilities. Justin will provide senior management oversight throughout the full course of the contract, and will closely monitor our team's performance in planning, coordinating and managing complex facility construction from inception to closeout. He is responsible for leading his project teams to achieve client goals and objectives and for producing functional, financially viable projects within established cost and schedule parameters.

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Los Alamitos High School STEM Building Los Alamitos Unified School District - \$52 Million

Lease-Leaseback delivery of comprehensive preconstruction and construction phase services of a new 3-story Science, Technology, Engineering, and Mathematics classroom building on an occupied high school campus.

Griffiths Middle School Modernization Downey Unified School District - \$39.4 Million

Scope of work included the lease-leaseback delivery of a new 19,420 SF, 2-story classroom building, a new 13,950 SF gymnasium and modernization of 9 classrooms.

Doty Middle School Modernization Downey Unified School District - \$35 Million

Lease-Leaseback delivery of a new 21,720 SF, two-story classroom building encompassing two towers connected by an open air bridge, and a new 13,990 SF gymnasium housing a stage/performance platform, retractable bleachers, and one large sports court with multiple striping patterns that can be used as a basketball court, practice courts, and volleyball courts. The gymnasium was constructed using metal stud framing and CMU block walls.

South El Monte High School Modernization El Monte Union High School District - \$30 Million

CM Multiple-Prime delivery of the modernization of South El Monte High School. Scope of work includes upgrades of all doors with electronic access controls, exterior painting, central plant HVAC replacement, and roofing replacement throughout the entire campus including the modular buildings. Modernization of 11 existing buildings include the administration, library, 3 classrooms, CTE classroom, 3 modulares, cafeteria, and gymnasium buildings and encompass the replacement of flooring, wall and ceiling finishes, light fixtures, casework, additional electrical and finish upgrades.

Jordan High School Classroom Building Long Beach Unified School District - \$29.8 Million

Lease-Leaseback delivery of the demolition of 4 existing buildings to make way for the construction of a new 2-story, 53,500 SF steel framed classroom building. The new classroom building will house special education classrooms, general education classrooms, career center, offices, treatment simulation lab, science and



JORGE CRUZ

Project Manager

EDUCATION

B.S. Civil Engineering; *California State University, Fullerton, 2018*

TRAINING

- CPR | AED | First-Aid
- OSHA 30-Hour
- Heat Illness
- Asbestos Awareness
- Defensive Driver Awareness

REFERENCES

Brandon Featherstone
Architect
Alder James
951.858.0115

Arielle Mascarinas
Architect
PBK Architects
949.548.5000

Paula Montalbo
Business Manager
Hermosa Beach City School District
310.937.8577

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

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

South El Monte High School Modernization El Monte Union High School District - \$30 Million

CM Multiple-Prime delivery of the modernization of South El Monte High School. Scope of work includes upgrades of all doors with electronic access controls, exterior painting, central plant HVAC replacement, and roofing replacement throughout the entire campus including the modular buildings. Modernization of 11 existing buildings include the administration, library, 3 classrooms, CTE classroom, 3 modularity, cafeteria, and gymnasium buildings and encompass the replacement of flooring, wall and ceiling finishes, light fixtures, casework, additional electrical and finish upgrades.

Hermosa View School Hermosa Beach City School District - \$23.4 Million

Lease-Leaseback delivery of the demolition of existing classroom buildings and parking lots with the construction of a new two-story, steel framed 15,000 SF administrative/library/classroom building, new courtyard with fabric shade structures, new parking and drop-off area, new kindergarten play area, new kitchen off of the multi-purpose room, and a new fire access road with other site improvements.

Cubberley K-8 School HVAC and Track & Field Project Long Beach Unified School District - \$14.5 Million

Lease-Leaseback delivery of the modernization of the campus HVAC system, interior renovations, and ADA upgrades. Scope of work also included site demolition, abatement, earthwork, site utilities, asphalt paving, striping, fencing, artificial turf, site and cast-in-place concrete, insulation, roofing, casework, ceramic and porcelain tile, flooring, signage, electrical, data communications, and fire alarm.



PERRY KO

Project Engineer

EDUCATION

B.S. Construction Management;
California State University, Fresno, 2020

TRAINING

- CPR | AED | First-Aid
- OSHA 30-Hour
- Defensive Driver Awareness

REFERENCES

David Miranda
Executive Director
Long Beach Unified School District
949.943.7510

Andrew Thompson
Principal
DLR Group
949.943.7510

Charlene Yarnell
Principal
PJHM Architects
760.730.5527

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

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Cubberley K-8 School HVAC and Track & Field Project **Long Beach Unified School District - \$14.5 Million**

Lease-Leaseback delivery of the modernization of the campus HVAC system, interior renovations, and ADA upgrades. Scope of work also included site demolition, abatement, earthwork, site utilities, asphalt paving, striping, fencing, artificial turf, site and cast-in-place concrete, insulation, roofing, casework, ceramic and porcelain tile, flooring, signage, electrical, data communications, and fire alarm.

Prisk ES School HVAC Project **Long Beach Unified School District - \$11.7 Million**

Lease-Leaseback delivery of the modernization of the campus HVAC system, interior renovations, and ADA upgrades at the administration, cafeteria, classroom, and auditorium buildings.

Jordan HS Phase 3 **Long Beach Unified School District - \$10 Million**

Lease-Leaseback delivery of the modernization of Building 1000 at Jordan High School. The scope of work includes painting the interior/exterior of the building, new signage, upgrading lighting fixtures, installation of a new fire alarm system, upgrading the roof HVAC units, new restrooms finishes to meet ADA standards, and the removal and replacement of both the existing roofing and ACT system.

MIKE CARRILLO

Superintendent

TRAINING

- CPR | AED | First-Aid
- OSHA 30-Hour
- Asbestos Awareness
- Defensive Driver Awareness

REFERENCES

Tom Ruzzuti
Director, Operations & Maintenance
Tustin Unified School District
949.293.4850

Kevin Allen
Project Executive
Silver Creek Industries
951.943.5393

Mike Carrillo joined Erickson-Hall in 2022; he has almost 2 decades of construction industry experience and has completed various public works projects, including the modernization and new construction of Southern California K-12 school facilities. In his role as Superintendent, Mike is responsible for the project schedule execution, coordination of contractors, managing construction crews, as well as overseeing jobsite safety and all onstruction and school site activities. His tasks include assisting the team with constructability reviews. Throughout the construction process, Mike will manage the jobsite, coordinate with outside agencies, ensure site security, and enforce Erickson-Hall's stringent quality control plan and safety programs. Other construction phase responsibilities include conducting construction meetings throughout the duration of the project. During closeout, Mike will take the lead on creating the punch list, scheduling final inspections and the commissioning of facilities.

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Beckman HS CTE Building & Auxiliary Gymnasium Tustin Unified School District - \$12 Million

CM Multi-Prime delivery of a new 8,500 SF Career Technical Education (CTE) Building and a new 13,500 SF Auxiliary Gymnasium. The CTE building houses a workshop, robotics lab, material storage room, and a 5,000 SF exterior work yard with shade structures. The Auxiliary Gymnasium houses one main court, two cross courts, restrooms, ancillary spaces, and a 3,000 SF weight room.

UCLA Medical Center Mental Health Living Facility (*not an Erickson-Hall Project) University of California, Los Angeles - \$73 Million

Scope of work included construction of six two-story modular dorm style living facilities for mental health on 3.44 acres. Site work included all hardscape, landscape, fire lanes, and parking lots.

Martin Luther King Hospital (*not an Erickson-Hall Project) Los Angeles, CA - \$121 Million

New construction of a 215,000 SF, 3-story state-of-the-art Behavioral Health Center. The new building houses community-based comprehensive programs to care for mental illness, substance use disorders and homelessness. Site improvements included upgraded underground utilities, ADA parking area, ADA outdoor recreation area, and ADA access aisle.

3. Resources



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An Employee Owned Company

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Company Resources Combined with **Insight & Experience**

Erickson-Hall understands that the Construction Management delivery method puts us in partnership with the District and design professionals to maximize construction value and quality of individual projects within the established budget and schedule. Erickson-Hall takes "ownership" in the project and works in cooperation and transparency with our clients to complete projects.


Corporate resources available to our team members reflect current market trends in bidding and material pricing; Erickson-Hall's extensive subcontractor database will be used to provide a substantive bid pool of qualified contractors providing the best work at the best price.

- **Value Engineering** - With each budget submission, the District and your design team, DLR Group, will receive Erickson-Hall's value engineering suggestions. Our approach to value engineering is to look for alternate, less costly means, methods, and building systems that will not alter the original design intent. We will look at the entire cost of the design, construction, and operation of each system.
- **Constructability Reviews** - The preconstruction phase will not only include detailed design document reviews, but also "boots on the ground" site verifications. During school holidays, Winter Break and Spring Break, our team will be onsite validating existing conditions, locating existing utilities, and confirming all aspects of the design documents work with the existing conditions. Thorough constructability reviews have been a key aspect to the success of previous Erickson-Hall projects.
- **Erickson-Hall's Estimating Department** includes a full-time staff of estimators and support personnel. Utilizing Timberline software, in concert with our extensive experience gained over more than two decades in K-12 construction, we will develop a cost estimate in CSI format to validate the existing budget. During construction, costs will be managed utilizing Timberline cost accounting software. Project costs will be easily tracked allowing our lease-leaseback team to forecast future costs based on expenditures to date. We will perform monthly reviews to ensure commitments are made timely and actual costs are tracking within the established budget.
- **Microsoft Project Scheduling** will be used to develop comprehensive CPM schedules for the project. We can produce project schedules with timelines established in two ways: by phases of the project and by consultant tasks within those phases. Special attention will be placed (critical path milestones) on state agency deadlines such as DSA, CDE, DTSC and OPSC/ SAB. Schedules will be developed with input from DLR Group, major trades and the District. Where required, project phasing and early material procurement will be considered. Regular updates will be performed to evaluate actual performance against the baseline schedule. If delays are encountered, routine updates will provide early notice allowing implementation of contingency plans and the ability to implement a fast-track schedule.
- We will coordinate **Pull Planning Sessions** with subcontractors and will update the Pull Planning Schedule weekly, as well as produce two-month look ahead schedules to ensure all subcontractors are on target for achieving milestone goals. Pull Planning is a commitment-based planning system where all team members continuously concentrate on eliminating waste and maximizing value by focusing on time. Every milestone and construction operation activity, from preconstruction through closeout, will be reviewed. Time commitments will be made by the trades. Commitments will be continually updated and unforeseen impacts overcome as the team works toward the common goal of on-time, on-budget completion.

4. Charter School Project Experience (CSFP)



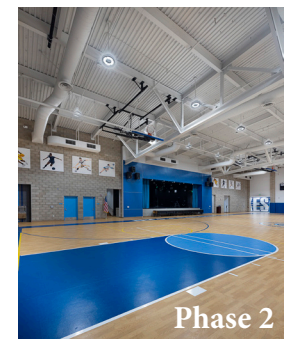
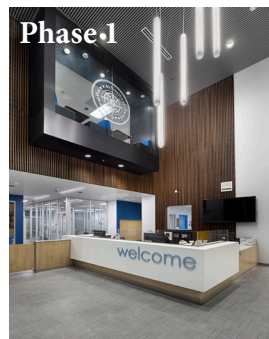
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CHARTER SCHOOL EXPERIENCE

5 YEAR HISTORY (partial listing)


Project	Owner	Estimated Project Cost	Actual Project Cost	Delivery Method	Project Description
Innovative Horizons Charter School - Phase 1	Perris Elementary School District Victor Guzman, Director, Maintenance & Operations 951.657.3118	\$23,087,705.00	\$22,148,318.00	Lease-Leaseback	Construction of a 13,674 SF, two-story classroom building, a 1,961 SF single-story locker room building, and a 20,304 SF gymnasium.
Innovative Horizons Charter School - Phase 2 & Phase 3	Perris Elementary School District Victor Guzman, Director, Maintenance & Operations 951.657.3118	\$21,871,900.00	\$21,345,200.00	Lease-Leaseback	Construction of a new two-story, 30,797 SF admin/classroom building, conversion of former MPR/Kitchen/Admin into a new Library Building, conversion of regular classrooms into new Art classrooms, upgrades to 2 existing restroom buildings, and installation of a new 1,950 SF Lunch Shelter. Site Improvements & installation of a new playground, 4 new shade structures, and new exterior paint at existing buildings.
Classical Academy Tenant Improvements	Classical Academy Russell Grant, Chief Information Officer 760.842.8000	\$1,807,008.00	\$1,782,008.00	Lease-Leaseback	Renovation of existing commercial office spaces for educational classroom use including new wall framing, storefront, doors, hardware, casework, utilities, bathroom renovation, new HVAC and electrical systems, and building exterior façade improvements. Scope also included rework of the site including new flatwork and asphalt, concrete basketball court space, stadium seating, artificial turf, masonry walls, irrigation, landscaping, and site lighting.
EJE Academies Charter	EJE Academies Charter School Eva Pacheco, Executive Director 619.401.4150	\$16,275,871.00	Ongoing	CM-Agency	New construction of a two-story, 38,000 SF wood-framed classroom building for grades 5-8 housing regular classrooms, a music room, counseling rooms, a broadcasting room, study rooms, a multi-media and journalism room, and a new science classroom.
Americas Finest Charter School	San Diego Unified School District Diane Malone, Sr. Project Manager 760.744.1543	\$27,500,000.00	Ongoing	Lease-Leaseback	Construction of a 25,793, two-story ES classroom building, renovation of a 9,865 SF MS building, removal of 10 portable buildings, construction of a 7,598 SF multi-purpose building, new playground/play areas and site work.
Albert Einstein Charter Elementary School	San Diego Unified School District Diane Malone, Sr. Project Manager 760.744.1543	\$17,984,850.00	Ongoing	Lease-Leaseback	Installation of seven relocatable classroom buildings and restrooms, construction of a new 42,452 SF Building C and a new 5,220 SF Building D with associated site work. Additional scope includes partial renovation of Building B and removal of interim housing units.



5. References



Erickson-Hall Construction
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Our Commitment to **Outstanding** Customer Service

Honesty and integrity are the guiding principles in everything we do at Erickson-Hall. We are committed to consistently maintaining the highest ethical standards while delivering superior client service. Our success in achieving that goal is best demonstrated by the accolades of satisfied clients.

Vision Statement

"Erickson-Hall strives to be the sought after builder in Southern California by investing in our employee owners who deliver quality and value in the projects we build."

What our **Clients** are saying:

*"Erickson-Hall's lease-leaseback team has been a great partner. They are always ready to assist with budgeting and scheduling to meet District needs. They helped facilitate design issues by bringing in the necessary trade contractors to work hand-in-hand with our design professionals. It became clear to me that Erickson-Hall has mastered the art of executing complex construction on an occupied school campus and recognized that Los Alamitos was a school first, a construction site second. **Their staff always puts the safety of students and campus first.**"*

The team has shown respect for the integrity of the learning environment, ensuring construction activities do not disrupt our students. In an effort to minimize the impact to staff parking and student drop-off, Erickson-Hall had the underground utility work performed at night.

Erickson-Hall's use of Building Information Modeling proved highly beneficial with the resolution of hundreds of conflicts/issues in the construction documents enabling the design team to resolve the conflicts prior to the start of construction. Needless to say, this allowed for a smooth process. Erickson-Hall brought the highest level of professionalism.

I look forward to working with them on projects for many years to come."

- Nancy Nien
Former Assistant Superintendent, Business Services
Los Alamitos Unified School District
(Currently with Anaheim UHSD)



"Immediately upon the start of preconstruction, it was readily apparent that Erickson-Hall was committed to collaborative interaction and effective communication... Their willingness to team was impressive."

- Vince Madsen
Senior Director
Facilities Planning & Development
Downey Unified School District

"Erickson-Hall's work and approach as well as their responsiveness to the multitude of directives and requests is exemplary. Their ability to balance the many projects we direct their way has allowed classroom construction to continue moving at top speed."

- David Miranda
Executive Director
Facilities Development & Planning
Long Beach Unified School District



Downey Unified School District

Gallegos Administration Center
11627 Brookshire Avenue, P.O. Box 7017, Downey, California 90241-7017
(562) 469-6500, FAX: (562) 469-6515

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John A. Garcia, Jr., Ph.D.

August 25, 2021

Erickson-Hall Construction Co.
500 Corporate Drive
Escondido, CA 92029

RE: Letter of Recommendation

To Whom It May Concern:

It is with significant pleasure I write this letter of recommendation for Erickson-Hall Construction Co. In 2019 Downey Unified School District contracted with Erickson-Hall for the lease-leaseback delivery of the modernization of Griffiths Middle School, and in 2020 we executed a second contract for the modernization of Doty Middle School. Both projects encompassed new construction of a 2-story classroom building, a new gymnasium building, modernization of existing classrooms, and extensive site work. Construction values for each project exceed \$30 million.

Immediately upon the start of the preconstruction phase of the Griffiths Middle School Project, it was readily apparent that Erickson-Hall was committed to collaborative interaction and effective communication between stakeholders. We appreciate the attention focused on ensuring the District's construction dollars were spent wisely. Their teams' focus on value engineering and constructability ensured we received maximum value for every dollar spent. Erickson-Hall is a proactive company, anticipating rather than reacting to project challenges. Their willingness to team with architects, engineers and District staff to identify and implement the most effective solutions while keeping the best interest of the District at the forefront of the decision-making process was impressive.

Finally, working on an occupied school campus can present a host of challenges, both to student safety and maintaining the integrity of the learning environment. Erickson-Hall recognized that our campuses are schools first and construction sites second. Student safety was never compromised under Erickson-Hall's watch, and we value their willingness to coordinate construction activities around the ongoing activities of campus life.

I can, without reservation, recommend Erickson-Hall.

Sincerely,


Vince Madsen
Senior Director
Facilities, Planning and Development
Downey Unified School District
11627 Brookshire Ave
Downey, CA 90241

vmadsen@dusd.net
(562) 469-6707





SANTA MONICA - MALIBU UNIFIED SCHOOL DISTRICT

December 8, 2020

Erickson-Hall Construction Company
500 Corporate Drive
Escondido, CA 92029

To Whom It May Concern:

I am pleased to write this letter of recommendation for Erickson-Hall Construction Co. Erickson-Hall served as the District's lease-leaseback contractor for the construction of a new, 32,000 SF, 2-story classroom building and joint-use library complex. Their scope of work included the hazardous material abatement and demolition of a classroom building originally constructed in 1950. All work had to be executed on the occupied Lincoln Middle School campus.

Lincoln Middle School is a highly active campus open to the public year round with facilities not normally seen in a middle school (full track and field, indoor swimming pool, full auditorium/stage complex). The campus is fully built-out with no additional land. Erickson-Hall was charged with demolishing an old classroom building and constructing a new building in its footprint while keeping the campus in operation and open to the public. Adding to the challenges presented by this project was the fact that the campus is surrounded by multi-family housing with a large, vocal group of residents concerned with potential negative impacts associated with construction and related traffic issues. There is insufficient campus parking for teaching staff, so construction parking had to occur off-site and nearly all parking in the surrounding community was restricted or limited. The City of Santa Monica has stringent requirements for noise control, work hours, trucking and disposal. Adding to all of these challenges was the fact that when Erickson-Hall was contracted, the project was over budget and needed to have construction costs significantly reduced in order to move forward.

Throughout the preconstruction phase, Erickson-Hall worked in collaboration with the District and our design team to develop more than 50 value engineering opportunities to reduce project costs by 20% and bring the project within budget while keeping all structural and aesthetic elements intact. Their commitment to fostering a collaborative team effort to identify and resolve challenges, while keeping the District's best interests at the forefront of the decision making process, was critical to the success of our project. The team's preconstruction activities included development of a construction execution plan that successfully addressed all of the challenges presented by the site, the surrounding community and the City of Santa Monica. Their commitment to ensuring the safety of students, staff and campus visitors, as well as maintaining the integrity of the learning environment, throughout construction never faltered. The team met every challenge presented by this complex project and delivered the project within agreed upon cost and schedule parameters. It was a highly successful project.

Without reservation, I am pleased to recommend Erickson-Hall as one of the best general contractors I have worked with in the construction of California K-12 school facilities.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Sheere Bishop-Griego'.

Sheere Bishop-Griego
Director of Procurement & Contract Management - Consultant

Santa Monica-Malibu Unified School District
Facility Improvement Projects/Bond Program
2828 Fourth Street • Santa Monica • California 90405 • (310) 450-8338 • www.smmusd.org





BUSINESS DEPARTMENT – Facilities Development & Planning
Office of the Executive Director
2425 Webster Avenue, Long Beach, CA 90810
(562) 997-7550 Fax (562) 595-8644

August 26, 2021

Subject: Letter of Recommendation for Erickson-Hall Construction

To Whom it May Concern:

I am pleased to write this letter of recommendation for Erickson-Hall Construction on behalf of the Long Beach Unified School District. Erickson-Hall and its assigned team members have provided exceptional construction services on several LBUSD school projects over the past decade.

Our Facilities Development & Planning division oversees a \$3 billion building program and has successfully completed several new construction, addition, and renovation projects on account of the firm's professional assistance. Specifically, Erickson-Hall has been instrumental in helping us leverage our local bond dollars by performing top notch pre-construction and construction services. We've assigned Erickson-Hall as the builder on time-sensitive projects and they have delivered on every occasion.

Erickson-Hall's work and approach as well as their responsiveness to the multitude of directives and requests is exemplary. Their ability to balance the many projects we direct their way has allowed classroom construction to continue moving at top speed. Further, their work for us on various types of projects such as classroom modernizations, campus expansions, and athletic facilities demonstrates their broad knowledge base and our continued trust in the firm.

It is without reservation and with great pleasure that I recommend this outstanding firm to other organizations. We expect to continue to have Erickson-Hall Construction play a key role on current and future projects for the Long Beach Unified School District.

Sincerely

A handwritten signature in blue ink, appearing to read 'D. Miranda', written over a light blue circular scribble.

David Miranda
Executive Director
Facilities Development & Planning





41870 McAlby Court, Murrieta, CA 92562
(951) 696-1600 • www.murrieta.k12.ca.us

Dave Erickson
Mike Hall
Erickson-Hall Construction
500 Corporate Drive
Escondido, CA 92029

Mr. Erickson and Mr. Hall:

I would like to provide my highest recommendation for the Erickson-Hall Murrieta Valley Unified School District team. David Irwin and Erin-Ryan Todd led their team on two projects for our District, the Vista Murrieta High School CTE building and the Murrieta Mesa classroom building.

Your team has demonstrated extensive knowledge and expertise with regard to preconstruction, scoping, constructability plan review, bidding, scheduling, and overall management and administration of the project. In addition, The District also appreciates their knowledge of our District Standards, OSHA requirements and DSA building codes. Above all, what I appreciate most is their overall concern of student/staff safety, campus security and safety of all contractors on the site which is of the utmost importance to our District.

The team that you have selected for Murrieta Valley Unified School District is by far the best team we have worked with. Their willingness to explain and assist with questions that may be outside of the given project is an invaluable asset. It is reassuring to know that when I need guidance on any particular matter related to planning or construction, any person from this team is willing to give their time to share with me requirements that must be followed or provide input and recommendations.

We have a Board and a community that is extremely proud of the Vista Murrieta CTE building and very excited for the opening of the Murrieta Mesa High School building in August. Your team was instrumental in keeping everything on track and ready to open for the first day of school.

I look forward to our next project.

Sincerely,

Lori Noorigian
Director, Facilities
(951) 696-1600 ext. 1080

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Kris Thomasian, Trustee Area 2
Kenneth Dickson, Trustee Area 3
Linda Lunn, Trustee Area 4
Paul Diffley, Trustee Area 5

Patrick Kelley
Superintendent

2018 California Exemplary District





South Bay Union School District

A community dedicated to achievement for all

Business Services
601 Elm Avenue
Imperial Beach, CA 91932
www.sbusd.org
☎ (619) 628-1672
☎ (619) 628-1678

June 14, 2022

To Whom It May Concern:

I had the opportunity to work with Erickson-Hall Construction Company. During our District's modernization upgrades to Emory and Central Elementary schools along with the reconstruction of VIP Village preschool, these past two years. I would like to express my appreciation for the excellent service and great customer service that they provided.

As Director of Facilities Planning, Energy Management, and Safety for South Bay Union School District, I worked closely with Erickson-Hall to make sure that the needs and standards of South Bay Union School District were not only met, but also exceeded. The reconstruction of VIP and modernization of Emory and Central Elementary was a challenge to our construction schedule. Especially during the COVID pandemic. Coordination and communication were crucial in completing the project a year ahead of schedule. Our students were able to start their school year in new or modernized schools.

Throughout the project, I know that Erickson-Hall truly acted as a partner with not only the District, but with each member of our construction team. Not only were RFIs and submittals reviewed and returned quickly, but their team was on-site to help coordinate any required field changes as they were discovered so that design intent was upheld while ensuring that our construction schedule was never compromised.

The cooperation and collaboration that Erickson-Hall brought to the table every day were greatly appreciated. This atmosphere resulted in a truly enjoyable project experience for everyone involved, a successful result, and a very pleased District. I look forward to the opportunity to work with Erickson-Hall Construction Company again.

Sincerely,

Francisco Franco

Director of Facilities Planning, Energy Management, and Safety

Superintendent
Jose Espinoza, Ed.D.


Board of Trustees
Marco Amaral • Louis Barrios • Mary Doyle • Jannet Medina • Cheryl Quiñones



6. K-12 Project Experience



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SIMILAR PROJECT EXPERIENCE



LOS ALAMITOS HIGH SCHOOL STEM BUILDING
3591 Cerritos Ave, Los Alamitos, CA 90720

OWNER

Los Alamitos Unified School District
10293 Bloomfield Street
Los Alamitos, CA 90720
Nancy Nien
Former Assistant Superintendent
714.999.3555

DESCRIPTION

Construction of a 3-story, 86,000 SF Technology, Engineering, Mathematics & Science Classroom Building housing 8 science labs, 2 chemistry labs and 17 classrooms.

START Jan 2020

COMPLETION Sep 2022

DELIVERY METHOD Lease-Leaseback

CONSTRUCTION VALUE \$52 Million



PACIFIC SKY SCHOOL
6631 Solterra Vista Parkway San Diego CA 92130

OWNER

Del Mar Union School District
31350 Rancho Vista Rd.,
Temecula, CA 92592
Christopher Delehanty
Director of Facilities & Technology
858.755.9301

DESCRIPTION

Construction of a new 4-building, 70,000 SF elementary campus on a 10.7 acre site for students in grade K-6.

START May 2021

COMPLETION Aug 2022

DELIVERY METHOD Lease-Leaseback

CONSTRUCTION VALUE \$53.6 Million



SIMILAR PROJECT EXPERIENCE



CROSS ELEMENTARY SCHOOL
2462 Cross Road Imperial CA 92251

OWNER

Imperial Unified School District
219 North "E" Street
Imperial , CA 92251
Bryan Thomason
Superintendent
760.355.3200

DESCRIPTION

Construction management of a new elementary school campus consisting of an administration building, 4 classroom buildings, a Kindergarten classroom building, and a multi-purpose building, all totaling over 60,900 SF.

START Oct 2017

COMPLETION Aug 2019

DELIVERY METHOD CM Multi-Prime

CONSTRUCTION VALUE \$32.7 Million



K-8 STEAM ACADEMY
35780 Abelia Street Winchester CA 92596

OWNER

Temecula Valley Unified School District
31350 Rancho Vista Rd.,
Temecula, CA 92592
Janet Dixon
Director of Facilities Development
951.506.7914

DESCRIPTION

Construction Management services for new construction of the K-8 STEAM Academy. The Project included 4 permanent buildings, a multipurpose/food service building, 100 parking stalls, temporary bus drop-off, athletic fields, shade structures and all other site improvements including playground structures and site hardscape and landscaping.

START Jan 2020

COMPLETION Aug 2021

DELIVERY METHOD CM Multi-Prime

CONSTRUCTION VALUE \$27.6 Million



SIMILAR PROJECT EXPERIENCE



ALBERHILL ELEMENTARY SCHOOL
4170 Brianna Circle Lake Elsinore CA 92530

OWNER

Lake Elsinore Unified School District
545 Chaney Street
Lake Elsinore, CA 92530
Dr. Gregory Bowers
Assistant Superintendent
951.253.7015

DESCRIPTION

Construction management of a 55,000 SF, 5-building elementary school campus with associated on and off site improvements.

START Jun 2018

COMPLETION Aug 2020

DELIVERY METHOD CM Multi-Prime

CONSTRUCTION VALUE \$27.2 Million



SAN DIEGUITO ACADEMY ARTS & HUMANITIES BUILDING
800 Santa Fe Drive Encinitas CA 92024

OWNER

San Dieguito Union High School District
710 Encinitas Blvd.
Encinitas, CA 92024
John Addleman
Executive Director, Planning
760.753.6491

DESCRIPTION

Construction management of a new 59,000 SF English Arts (ESA) building and associated landscaping and site work.

START Jan 2018

COMPLETION Aug 2019

DELIVERY METHOD CM Multi-Prime

CONSTRUCTION VALUE \$20.9 Million



SIMILAR PROJECT EXPERIENCE



GRIFFITHS MIDDLE SCHOOL MODERNIZATION
9633 Tweedy Lane Downey CA 90240

OWNER

Downey Unified School District
545 Chaney Street
Lake Elsinore, CA 92530
Vince Madsen
Senior Director, Facilities, Planning &
Development
562.469.6707

DESCRIPTION

Construction of a new 19,420 SF, 2-story classroom building, a new 13,950 SF gymnasium and modernization of 14 existing buildings. Scope also included demolition of 3 existing modular buildings, portable building village and 30 basketball courts and installation of temporary courts during construction and 8 new portable classroom buildings with handrails, site lighting and new concrete.

START Jun 2019

COMPLETION Dec 2021

DELIVERY METHOD Lease-Leaseback

CONSTRUCTION VALUE \$40.5 Million



ORANGE VISTA HIGH SCHOOL GYMNASIUM
1400 E. Orange Avenue Perris CA 92571

OWNER

Val Verde Unified School District
975 W. Morgan Street
Perris, CA 92571
Stacy Strawderman
Director of Facilities
951.940.6136

DESCRIPTION

Construction management of the construction of a 50,200 SF gymnasium and supporting facilities. Gym features a 2,033 SF wood floor, fully mirrored dance room, wrestling room, weight room, locker rooms and showers, laundry facilities, offices, ticket booth, team room with state-of the art audio/visual technology.

START Dec 2015

COMPLETION May 2017

DELIVERY METHOD CM Multi-Prime

CONSTRUCTION VALUE \$13 Million



SIMILAR PROJECT EXPERIENCE



GROSSMONT HIGH SCHOOL EVENT CENTER
1100 Murray Drive El Cajon CA 92020

OWNER

Grossmont Union High School District
1100 Murray Drive
La Mesa, CA 92020
Chris Rizzuti
Project Manager
619.778.3822

DESCRIPTION

Construction management of a 26,670 SF event center featuring a spacious auditorium with a seating capacity for 469, a dance studio, recording & choral studios, and an expanded black box theater. The event center has a flat floor with retractable seating and a ceiling pipe grid to promote flexibility for holding a variety of events.

START Jan 2019

COMPLETION Nov 2020

DELIVERY METHOD CM Multi-Prime

CONSTRUCTION VALUE \$18 Million



GROSSMONT HIGH SCHOOL STUDENT SERVICES BUILDING
1100 Murray Drive El Cajon CA 92020

OWNER

Grossmont Union High School District
1100 Murray Drive
La Mesa, CA 92020
Dena Johnson
Project Manager
619.644.8150

DESCRIPTION

Construction management of a 2-story, Student Support Services Building housing administrative offices, conference rooms, counseling center, nursing office, exam room and student waiting areas, an Art Classroom Building and restroom building.

START Jun 2015

COMPLETION Jul 2016

DELIVERY METHOD CM Multi-Prime

CONSTRUCTION VALUE \$10.3 Million

CONSTRUCTION MANAGEMENT EXPERIENCE

5 YEAR HISTORY (partial listing)



Project	Owner	Estimated Project Cost	Actual Project Cost	Delivery Method	Project Description
Menifee Middle School #4	Menifee Union School District Jim Sellers, Facilities Director 951.672.1851	\$49,052,307	Ongoing	CM Multiple-Prime	New 94,000 SF 48-classroom middle school with a multi-purpose room complete with a stage and amphitheater, a gymnasium with locker rooms, kitchen, central administration and media center, music room, and special education classrooms.
Hesperia District-Wide HVAC Replacement	Hesperia Unified School District Virginia Gutierrez, Director Purchasing & Facilities 760.244.4411	\$33,000,000	Ongoing	CM Multiple-Prime	District-wide replacement of over 1,500 HVAC units throughout 25 different school campuses. Scope of work encompassed removal and replacement of HVAC units, associated structural and electrical work, roof patching, mechanical equipment curbs, CO2 monitors, drywells and other related work.
South El Monte HS Modernization	El Monte Union High School District Norma Macias, Director of Facilities, M&O 626.444.9005	\$30,000,000	Ongoing	CM Multiple-Prime	Modernization of 11 existing buildings: administration, library, 3 classrooms, CTE classroom, 3 modulars, cafeteria, and gymnasium buildings.
 K-8 STEAM Academy	Temecula Valley Unified School District Janet Dixon, Director of Facilities Development 951.506.7914	\$28,700,000	\$27,639,244	CM Multiple-Prime	Complete demolition and construction of four new buildings totaling in approximately 47,000 SF, relocation of 10 portable classroom buildings from other campuses, and miscellaneous site improvements.
 Cross Elementary School	Imperial Unified School District Bryan Thomason, Superintendent 760.355.3200	\$28,284,568	\$32,763,509	CM Multiple-Prime	New 60,000 SF elementary school campus consisting of 5 single story classroom buildings, administration building and a multi-purpose building, 3 parking lots, multi-use courtyard and associated street improvements and site work.
Alberhill Elementary School	Lake Elsinore Unified School District Greg Bowers, Asst. Superintendent 951.253.7015	\$27,465,220	\$27,244,065	CM Multiple-Prime	New 55,000 SF ground-up elementary school that includes 5 buildings housing one administration building, a multi-purpose building, and 3 classroom buildings totally in almost 30 Pre-K - 5th grade classrooms.
Hesperia High School Event Center	Hesperia Unified School District Virginia Gutierrez, Director Purchasing & Facilities 760.244.4411	\$27,000,000	Ongoing	CM Multiple-Prime	Construction of a new 35,000 SF Event Center encompassing a stage with 500 seats, classrooms, student dressing rooms, and a flex area. Site work includes relocation of existing tennis courts, landscaping, and site work around the new building.



Projects profiled within this section.

CONSTRUCTION MANAGEMENT EXPERIENCE

5 YEAR HISTORY (partial listing)

	San Dieguito Academy Arts & Humanities Building	San Dieguito Union High School District John Addleman Executive Director, Planning 760.753.6491	\$21,458,055	\$20,920,671	CM Multiple-Prime	Construction of a new 58,765 SF, two-story, split-level classroom building including a masonry kiln yard to house existing electric and gas-fired kiln equipment, new masonry trash enclosure, bio-retention basin, new landscaping throughout the site that utilizes reclaimed water for irrigation and 22,000+ permeable pavers in the courtyard and parking lot.
	Grossmont High School Event Center	Grossmont Union High School District Dena Johnson, Project Manager 619.644.8150	\$17,529,173	\$18,004,795	CM Multiple-Prime	The new 26,2670 SF Event Center provides a spacious auditorium with seating for 469, dance studio, recording and choral studios, and expanded "black box" theater. It also includes indoor and outdoor learning and gathering spaces, extensive new concrete paving, retaining walls, and landscaping.
	Monroe Elementary School	Riverside Unified School District Eric Walker, Asst. Director Facilities Projects 951.788.7496 x84705	\$16,000,000	Ongoing	CM Multiple-Prime	New construction of a single-story classroom building, two restroom buildings, lunch shelter, playground, existing classroom and restroom upgrades, and site improvements.
	Canyon Springs High School Athletic Complex	Moreno Valley Unified School District Jorge Alvarado, Facilities Planner 951.571.7690	\$15,267,200	\$16,027,418	CM Multiple-Prime	Construction of a new stadium/athletic complex to include a new Home & Visitor bleachers, all weather track and field, new support buildings, relocation of tennis courts, and renovation of existing ball fields.
	Imperial High School MPR & CTE Facility	Imperial Unified School District Bryan Thomason, Superintendent 760.355.3200	\$14,300,170	Ongoing	CM Multiple-Prime	Construction of a new 20,560 SF Multi-Purpose Building with a CTE Facility and a separate snack bar. The new building houses an assembly area with a stage, kitchen/cafeteria, multiple restroom facilities, teaching classroom and instructional laboratory along with a courtyard and site utility improvements.
	College of the Desert Indio Child Development Center	College of the Desert Ryan Lamb, Senior Project Manager 760.346.8041	\$14,000,000	Ongoing	CM Multiple-Prime	A new 17,000 SF Child Development Center encompassing two toddler and two preschool classrooms, support spaces required for state-of-the-art child care facility, adult ECE classroom, and observation spaces. Site work includes 7,000 SF of play yards with shade structures, undergrounding of existing utilities, and new parking spots.
	Jefferson Elementary School - Riverside	Riverside Unified School District Eric Walker, Asst. Director Facilities Projects 951.788.7496 x84705	\$13,222,170	\$14,987,956	CM Multiple-Prime	Construction of a new single-story Kindergarten Classroom Building, relocation of 3 portable classroom buildings, demolition of 6 interim housing portables, and site work along the path of travel.

 Projects profiled within this section.

CONSTRUCTION MANAGEMENT EXPERIENCE


5 YEAR HISTORY (partial listing)

Beckman HS CTE Building & Auxiliary Gym	Tustin Unified School District Tom Rizzuti, Director of Facilities & Planning 714.730.7301	\$12,000,000	Ongoing	CM Multiple-Prime	Construction of a new 8,500 SF Career Technical Education (CTE) building and a new 13,500 SF auxiliary gymnasium. The CTE building houses a workshop, robotics lab, material storage room, and a 5,000 SF exterior work yard with shade structures. The Auxiliary Gymnasium houses one main court and two cross courts, restrooms, ancillary spaces, and a 3,000 SF weight room.
Mountain Empire USD JJ Bond Phase 1	Mountain Empire Unified School District Gary Hobelman, Asst. Superintendent of Business 619.473.9022	\$12,000,000	Ongoing	CM Multiple-Prime	Renovation to the high school campus administration building and conversion of the high school into a joint use middle school and high school campus.
Murrieta Mesa High School Classroom Expansion	Murrieta Valley Unified School District William Olien, Deputy Superintendent (Retired) 951.473.7286	\$11,000,000	\$10,073,059	CM Agency	New classroom building to house 11 classrooms, offices, storage and a conference room on the Murrieta Mesa High School campus. The CTE expansion at Vista Murrieta High School is expanding to a new classroom building which will create space for the ROTC program, as well as other CTE programs.
Mt. Miguel High School Student Support Services	Grossmont Union High School District Dena Johnson, Project Manager 619.644.8150	\$10,488,233	\$11,779,131	CM Multiple-Prime	Demolition of existing building and construction of a new 9,240 SF Student Support Services Center and a 4,500 SF Multi-Cultural Center, and the refurbishment of the 150,000 SF main parking lot.
Vista Murrieta High School CTE Classroom Buildings	Murrieta Valley Unified School District William Olien, Deputy Superintendent (Retired) 951.473.7286	\$10,000,000	\$11,709,435	CM Multiple-Prime	New construction of a two-story, 25,802 SF CTE Building and a one-story, 3,883 SF Junior Reserve Officers' Training Corps (JROTC) Building, with new poured concrete walls for handball courts and minor landscape changes.

7. Services Approach



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Services Approach

Erickson-Hall's approach to providing outstanding service begins with the commitment of a well established team. Justin Sinnott, Vice President will be your Project Executive and team leader for every District project awarded to our firm. Justin, a seasoned construction professional, joined Erickson-Hall in April 2014. Justin brings indepth knowledge of District expectations and processes, and has established working relationships with DSA inspector(s) involved with your District projects. We understand that serving as the District's construction manager puts us in partnership with the Magnolia Public Schools and DLR Group to maximize construction value and quality standards within the established budget and schedule parameters. We will take "ownership" of District goals and objectives and will work in cooperation and transparency with the District to deliver every project awarded to our firm within agreed upon cost and schedule parameters. The following outline highlights the processes and procedures Erickson-Hall will use to manage the Magnolia Science Academy 5:

Preconstruction Phase Services

- **Cost | Budget Review | Estimating** - Erickson-Hall's Estimating Department includes a full-time staff of estimators, a BIM Manager and support personnel. Utilizing Timberline software in concert with our extensive experience during the past two decades building DSA-regulated projects, we will develop cost estimates in CSI format to validate existing budgets. During construction, costs will be managed utilizing Timberline cost accounting software. Project costs will be easily tracked allowing our construction management team to forecast future costs based on expenditures to date. We will perform monthly reviews to ensure that commitments are made and actual costs are tracking within established budgets.
- **Value Engineering & Value Analysis** - Late attempts at value engineering result in scope reductions to control cost overruns which may adversely affect the District's desired program. True value engineering often results in alternate, less costly means, methods, materials and building systems without altering original design intent or baseline program. Value engineering will be a collaborative effort with our construction management team, contractors, design consultants, and the District. At times our team may recommend changes that cost more initially, but will result in a higher value to the District. Throughout all budgeting and value engineering activities, our team will remain focused on managing project costs by balancing the project scope and District expectations, quality standards and available construction dollars.
- **Quality Control | Constructability Reviews | BIM** - Critical to Erickson-Hall's success as your Construction Manager will be our ability to improve the quality of the construction documents while maximizing the District's construction dollars. We will accomplish this goal by holding regular design coordination meetings to review and coordinate plan development against the backdrop of a series of progressively more detailed budgets and constructability reviews. The budgets and constructability reviews will serve the District and design team in making more informed decisions based on progressively more detailed cost data throughout the design process. Through a highly interactive team environment, we will work together to deliver budget-conscious designs for each project phase that maximize District construction dollars while improving the overall quality of the project. This process involves the following components:
 - **Virtual Prototype, BIM, Clash Detection, and Cost Planning** - Critical to Erickson-Hall's success as construction manager, lease-leaseback contractor, and design-builder is our ability to improve the quality of construction documents while maximizing our clients' construction dollars. Utilizing Building Information Modeling, Rebecca Ritsema Hanash, Erickson-Hall's BIM Manager, performs comprehensive constructability reviews of materials and specifications that impact costs and scheduling to present relevant project information embedded within a 3D model. Through a process of "Clash Detection", BIM facilitates the risk level or "Problem Discovery" operations at the beginning of projects where time delays and revisions are more cost effective to the project. Through this effort our teams are able to visually identify cost savings and send value engineering ideas to the client and estimating database. Constructability questions are observed, not just identified.
 - » Building Information Modeling (BIM) Software
 - REVIT
 - NavisWorks
 - Adobe
 - GoogleDocs
 - Other Virtual Communication & Efficiencies



SERVICES APPROACH

Verification of Existing Conditions – The most effective way of reducing unforeseen conditions is to conduct site evaluations. Our team will visit each site and document actual conditions in the field and share our findings with the design team to ensure project designs take existing conditions into account. Through in-house resources and the aid of ground penetrating radar, we have the ability to model the conditions in three dimensions, locate sub-grade utility lines, as well as review any existing facilities for hazardous materials. This information will prove to be invaluable during programming and design phases to ensure proper provisions are being made early in the Preconstruction Phase. Enhancing our team's knowledge of existing site conditions is their established working relationships with local utility providers reducing the learning curve commonly found when working with these local entities.

- **Project Scheduling** - Our construction management team utilizes MS Project scheduling software and is experienced with developing detailed project schedules. We will produce project schedules with timelines established in two ways: by phases of the project and by consultant tasks within those phases. Special attention will be placed (critical path milestones) on State Agency deadlines such as DSA, CDE, DTSC and OPSC/SAB. Schedules will be developed with input from design teams, major trades and the District. Where required, project phasing and early material procurement will be considered. Regular updates will be performed to evaluate actual performance against baseline schedules. If delays are encountered, routine updates will provide early notice allowing implementation of contingency plans and the ability to implement a fast-track schedule. Web-based Procore project manage software allows project stakeholders to access logs, transmittals, submittals and related project documentation from any site with Internet capability.
 - » **Pull Planning** - Our construction management team will coordinate Pull Planning Sessions with contractors and will update pull planning schedules weekly, as well as produce two-month look ahead schedules to ensure all contractors are on target for achieving milestone goals. Pull Planning is a commitment-based planning system where all team members continuously concentrate on eliminating waste and maximizing value by focusing on time. Every milestone and construction operation activity, from preconstruction through closeout, will be reviewed. Time commitments will be made by the trades. Commitments will be continually updated and unforeseen impacts overcome as the team works toward the common goal of on-time, on-budget completion.
- **Bidding** - Projects will be released for contractor bidding upon completion of constructability reviews. Our estimators will begin the bidding process by performing outreach to local subcontractors. We utilize a software program called PowerTools Bid Fax to specifically target local firms by area code. With District Representatives, we will assist in pre-bid jobwalks during which time we will outline the scope of work, safety requirements and requirements for working on the occupied campus. Our Estimators will obtain a minimum of three bids per trade. We will review subcontractor bids for compliance with District stated goals. Erickson-Hall will review subcontractor bids and our bid summary with the District and design teams, finalize contingencies and allowances, and when applicable, establish a Guaranteed Maximum Price prior to award of any subcontracts.
 - » **Outreach** - An aggressive outreach program focused on identifying, qualifying and contracting with contractors local to the District will be implemented. Our team will work diligently to identify viable concerns during the bid process to expand our already extensive contractor database and ensure participation goals by local contractors are achieved.
- **DSA/Other Regulatory Agency Reviews & Approvals** - District needs will remain at the center of our project approach. We will assist the District in obtaining all necessary reviews and approvals from the various regulatory agencies, including all utility agencies, as well as the Division of the State Architect, and the local County Fire Marshall. Our team will make revisions and corrections consistent with agency reviews and will obtain final approvals from governing authorities to secure final DSA approval. To assure timely submission to DSA, we will conform to the agreed upon project production schedule. Once construction is underway, our team will monitor design team activities to ensure consultants assess, coordinate and prepare proper Construction Change Directives (CCD) as required to direct contractors should changes be necessary. Prior to submission to DSA, we will work with the District to ensure compliance with District standards and processes. To assure effective field communication, we will directly involve the Inspector-or-Record and DSA Field Engineer.

Construction Phase Services

- **Kick-Office Meeting** - Erickson-Hall will host a project kick-off meeting involving the District, the design team, and selected contractors. The purpose of the meeting will be to communicate the purpose of the project, project goals, lines of communication, risk management expectations, billing procedures, project milestones, occupied campus guidelines, etc.



SERVICES APPROACH

- **Electronic Document Management Controls** – Procore a Web-based project management software, will be used to generate, process and track submittals, requests for information, meeting minutes, daily reports, correspondence, etc. All project documentation will be uploaded to the project-specific, web-based collaborative HUB, allowing immediate access to project team members for distribution, retrieval and/or review. The system will allow users to post and access current documentation or logs from any location with Internet access. All project documentation will be maintained electronically including plans, specifications and submittals allowing for immediate transmission of routine documentation which reduces turn-around time from “days and weeks” to “minutes and hours”. Our FTP website will also aid in the transmission of large files, plans and specifications.
 - » **Digitized Drawings** - Our team will digitize project drawings and hyperlink RFIs, approved submittals, amendments, architectural supplemental instructions, as well as pre-existing utilities and fixed improvements to create a fully digitized as-built condition for each project.
- **Communication** - Established lines of communication will be a key component in the execution of the construction phase. At Erickson Hall we know how important it is for all trade communications to come through us, not directly to District staff or District representatives. All conversations, notices and interactions will be funneled through our team to the appropriate and agreed upon individuals within the District. The lines of communication will be relayed to every worker on site.

- **Monitor and Control the Progress of Projects | Contractor Performance** - Our construction management team will ensure the scope of services included in subcontracts is clearly written, with milestone deliverables acknowledged and with fees and payment processes identified. Each firms contracted performance standards will be expected to mirror the District’s performance expectations. This will prove highly beneficial to Erickson-Hall’s ability to monitor project progress and quality of performance at project meetings. Contractors will be expected to participate in regularly scheduled project status update meetings involving the District, design teams and Erickson-Hall. We will monitor project progress on a daily basis and will update construction schedules weekly and produce two week look-ahead schedules detailing which trades will be performing on each jobsite on a daily basis for two week time periods. The Pull Planning component of our scheduling procedures (see Preconstruction Services - Scheduling) will prove highly beneficial in contractors achieving project milestones.

Flexibility will be key to ensuring a collaborative work environment. We understand that District needs can change at any time. Should an unexpected change be requested, our team will first work to develop a clear understanding of the need for the change in order to develop the most cost/time effective resolution. We will then prepare a sequence plan detailing any cost/ time impacts associated with the change for District review. Whenever appropriate, Erickson-Hall will increase staff and/or shifts to minimize delays or accelerate the schedule to keep the project on schedule. Ultimately, our goal will be to ensure the District’s complete satisfaction with the end product and the journey from notice to proceed to occupancy.

- **Submittal/Shop Drawings/RFIs** - Our team will review all submittals, shop drawings and RFIs for accuracy and conformance with contract documents prior to passing them on to design teams. When necessary, we will suggest/require mock-ups be included in specifications to ensure desired standards are achieved. Our Superintendent will perform “pre-inspections” when contractors submit Inspection Requests to assure each item is indeed ready for Inspection. This pre-inspection procedure will also be included in Scheduling Pull Planning sessions.
- **Quality Control Procedures During Construction** - Erickson-Hall follows the United States Navy/Army Corps of Engineers QA/QC Program format. The Quality Control Program is an important aspect of any project and consists of a Quality Control Manager (typically the Superintendent), QC Specialists, Submittal Reviewers, and the District’s independent testing laboratory for material sampling, testing and inspection. The QC Manager will conduct the following three phases of inspection:
 - » **Preparatory Phase** – Prior to subcontractors starting work, we will hold trade contractor pre-installation meetings and review applicable specifications, drawings, submittals and testing plans. We examine the work area to ensure required preliminary work is completed and examine materials for conformance with approved submittals. We also review the safety plan and ensure applicable SDS are on file at the jobsite and discuss construction methods.
 - » **Construction Phase** – Upon commencement of the work, establish the quality of workmanship required, resolve conflicts, review safety plan and coordinate with the Testing agency for required testing.



- » **Follow-up Phase** – Ongoing with the work, ensure that the work is in compliance with the contract requirements, quality of workmanship is maintained, testing is performed and rework items corrected.
- **Safety** - In order to avoid complacency and ensure our team's focus remains on safe project execution, we will operate a "Back to Basics" approach to jobsite safety, concentrating on basic fundamentals. Our safety record was not established on "luck" but by strategic execution of our safety program, starting with executive management.
 - » **Management Ownership and Involvement** - Management's ownership of safety is evident throughout the company with investments being made in innovative safety programs and continuous training in risk identification/mitigation, subcontractor safety oversight and emergency/crisis management. Our CEO and COO lead monthly superintendent safety meetings and project management team safety meetings, participate in mandatory safety training, and maintain permanent positions on the Safety Committee. As responsible leadership concerned with safety, they perform periodic safety audits on active sites ensuring project teams remain vigilant in the implementation of our safety program.
 - » **Preconstruction Safety Meetings** - Preconstruction safety meetings will be held to review safety protocols with all project stakeholders. Prior to contractors mobilizing onsite, we will hold pre-coordination meetings to discuss overall work scopes, and throughout the course of construction we will hold additional pre-task meetings to focus on each definable feature of work and review/revise/accept contractor's Activity Hazard Analysis (AHA).
 - » **Weekly Safety Meetings** - Every superintendent at every Erickson-Hall jobsite holds weekly safety meetings to address hazards and reinforce safety requirements. Weekly safety meetings provide an excellent platform to consistently address safe work practices with the contractor workforce.
 - » **Contractor Management** - Contractor safety management begins prior to mobilization with review of contractors' jobsite-specific IPPP, as well as the requirement for their participation in pre-coordination meetings, AHA submissions, pre-task meetings, and verification of employee training certifications. Throughout construction, our onsite superintendent will conduct mandatory daily huddles, weekly safety meetings and weekly foremen meetings, oversee all contractor safety practices and recognize contractor employees who have demonstrated exemplary safety awareness and performance. In addition to serving as a construction manager, Erickson-Hall is a licensed general contractor, and we know it takes an entire team to complete our projects safely.


Post Construction Activities

During the construction phase, record drawings (as-builts) will be maintained at the site by our Superintendent who will ensure that contractors update record drawings daily to reflect underground and concealed work. Upon construction completion, record drawings will be scanned and saved electronically. Our team will consolidate and provide electronic and hard copy files in tabbed binders for O&M Manuals and Warranties. Record submittals will be saved and incorporated into electronic O&M Manuals. We will schedule training for District personnel following start-up and commissioning. If feasible, training will be videotaped for future use. Erickson-Hall's project team will complete Verified Report Form DSA-6 and assist design teams with back-up documentation for all project changes in order to obtain DSA sign-off.

8. Project Specific Methodolgy



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PROJECT SPECIFIC METHODOLOGY

a. Team work is critical to the success of the Magnolia Science Academy 5. As your construction manager, Erickson-Hall will lead the efforts to bring the team closer through weekly meetings, in person page turns, and pull planning scheduling efforts. At the weekly meetings, communication is key, and all current and projected challenges will be discussed and worked through. In person page turns will be held with all key stakeholders to ensure the team that all Magnolia Public School standards are incorporated, and all performance and functionality requirements are met at the lowest possible costs. Lastly, pull planning scheduling is a lean construction technique where all prime contractors meet to build the project schedule together, based on Erickson-Hall's aggressive project milestones. This technique leads to complete schedule buy in from all parties, and brings to light potential issues long before they affect the project.

b. Erickson-Hall will assemble bid documents during pre-construction that include all local and state public contract compliance items. The full project schedule will be incorporated into bid documents for all scopes, and liquidated damages will be tied to any failures. Schedule expectations will be set early on in the process, and reiterated during numerous job walks. These schedule requirements will then be included in prime contractor contracts, and enforced throughout construction. As a general contractor, in addition to a construction manager, Erickson-Hall understands what it takes to complete this project on time, and we know which prime contractors will succeed, and which will have performance difficulties. We will hold numerous pre-construction community outreach events, and we will conduct a thorough prequalification process, to ensure the correct contractors are awarded the project.

c. Erickson-Hall will work hand in hand with Magnolia Public Schools to put together a phasing plan that works best for the students and the staff. Phase 1, which includes all science classrooms, and half of the standard classrooms, will be open for a year while construction continues on Phase 2. A majority of our work is performed on occupied campuses, and we understand what it takes to keep schools operating business as usual as we move through construction. A special focus will be placed on temporary fencing and gate layouts, parking and drive lanes, and testing periods, to ensure that student learning is not disrupted.

d. At Erickson-Hall, we understand that plans can change. We are flexible, and will always have your best interests in mind as we move through construction. Our vast experience (more than \$1.5B in school construction completed) will help us show pros and cons of each decision, and we will help the entire project team come to the best decisions, even if that means changing the original plan. If the Phase 1 scope was to change or increase, we would immediately identify the impacts, and we would work through the challenges to make sure all Magnolia Public School goals are achieved. We would identify changes and additions to long lead materials, and we would identify and ensure that utility tie-ins and connections are complete in any buildings that need to change phase.

e. Vetting the contract documents and putting together a thorough constructability review, and putting together complete and thorough bid documents, where scopes are crystal clear, will minimize, and likely eliminate any claims. If a claim was to arise, Erickson-Hall (in tandem with your legal counsel) will act as a third party mediator. We will include "proceed under protest" language in all prime contractor contracts so that work, and the schedule, is not interrupted in the event of a dispute. If the contract is not followed, Erickson-Hall will begin work to immediately supplement crews, all in an effort to hit every milestone and the final project completion date.

f. Erickson-Hall will manage and oversee all steps in the public bidding process, starting with the two consecutive weeks of advertisements (both with DVBE advertising sources, and local publications). Erickson-Hall will also host community outreach events, where we drum up interest in the local subcontracting community, and we will lead multiple job walks where we highlighting the intricacies of the project. Erickson-Hall will also review and collect prequalification packets from prospective contractors, all following Assembly Bill 1565. We will manage all aspects of the public bidding process, ensuring that all Magnolia Public School goals are met.

g. Numerous local and state agencies will be involved with the approval and completion of the Magnolia Science Academy 5, including DSA, CDE, DTSC, OPSC, and local city agencies. With over 25 years of public school construction experience, Erickson-Hall has substantial experience with each of these agencies, and will lead all efforts in achieving approvals from each of them.



MAGNOLIA SCIENCE ACADEMY 5

ID	Task Name	Duration	Start	Finish	1, 2023					Half 2, 2023					Half 1, 2024					Half 2, 2024					Half 1, 2025					Half 2
					F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	
1	Project Overview	344 days	Fri 3/10/23	Wed 7/3/24																										
2	Complete Set 1 Plans (Grading/Utilities)	35 days	Fri 3/10/23	Thu 4/27/23																										
3	DSA Approval Set 1 Plans (Grading/Utilities)	40 days	Fri 4/28/23	Thu 6/22/23																										
4	Complete Set 2 Plans (All Buildings)	49 days	Fri 3/10/23	Wed 5/17/23																										
5	DSA Review/Approval Set 2 Plans (All Buildings)	100 days	Thu 5/18/23	Wed 10/4/23																										
6	Bid Out Structural Steel (DURING DSA REVIEW!!!)	20 days	Thu 5/18/23	Wed 6/14/23																										
7	Complete Single Line/Edison Plans/Long Lead Gear Design	15 days	Fri 4/28/23	Thu 5/18/23																										
8	Magnolia Public Schools Purchase Long Lead Gear	250 days	Fri 5/19/23	Thu 5/2/24																										
9	Bid Packaging/Bidding Period Set 1 (Grading/Utilities)	30 days	Fri 6/23/23	Thu 8/3/23																										
10	Bid Packaging/Bidding Period Set 2 (All Buildings)	40 days	Thu 10/5/23	Wed 11/29/23																										
11	Complete BIM	25 days	Thu 11/30/23	Wed 1/3/24																										
12	HVAC/LV Submittal Approvals	15 days	Thu 11/30/23	Wed 12/20/23																										
13	HVAC Unit Procurement	140 days	Thu 12/21/23	Wed 7/3/24																										
14	Low Voltage Cabling/Equipment Procurement	120 days	Thu 12/21/23	Wed 6/5/24																										
15	Steel Procurement/Shop Fabrication (DURING DSA REVIEW!!!)	90 days	Thu 6/29/23	Wed 11/1/23																										
16	Phase 1	266 days	Fri 8/4/23	Fri 8/9/24																										
17	Prime Contractors Mobilize	1 day	Fri 8/4/23	Fri 8/4/23																										
18	Complete Over Ex/Grading/UG Utilities	25 days	Mon 8/7/23	Fri 9/8/23																										
19	Dig/Form/Pour Spread Footings/Grade Beams	12 days	Thu 11/30/23	Fri 12/15/23																										
20	Erect Structural Steel	33 days	Mon 12/18/23	Wed 1/31/24																										
21	Set Metal Decking on Both Floors	8 days	Thu 2/1/24	Mon 2/12/24																										
22	Pour Lightweight Concrete on Both Floors	8 days	Tue 2/13/24	Thu 2/22/24																										
23	Install Metal Stud Framing	15 days	Fri 2/23/24	Thu 3/14/24																										
24	Complete Plaster on Parapets	5 days	Fri 3/15/24	Thu 3/21/24																										
25	Install Roofing System	10 days	Fri 3/22/24	Thu 4/4/24																										
26	Install HVAC Units	5 days	Thu 7/4/24	Wed 7/10/24																										
27	Densglass/Paper/Lath Exteriors	7 days	Fri 3/22/24	Mon 4/1/24																										
28	Install Storefront Window Frames	5 days	Tue 4/2/24	Mon 4/8/24																										
29	Plaster Exterior	20 days	Tue 4/9/24	Mon 5/6/24																										
30	Install Exterior Perforated Panels	5 days	Tue 5/7/24	Mon 5/13/24																										
31	Base/Pave Drive Lane	5 days	Tue 5/14/24	Mon 5/20/24																										
32	Complete Parking Lot Striping	2 days	Tue 5/21/24	Wed 5/22/24																										
33	Complete 1st Floor Rough In	15 days	Fri 3/15/24	Thu 4/4/24																										
34	Complete 2nd Floor Rough In	15 days	Fri 4/5/24	Thu 4/25/24																										
35	Insulation/Drywall	15 days	Fri 4/26/24	Thu 5/16/24																										
36	Paint Interior	8 days	Fri 5/17/24	Tue 5/28/24																										









Project: Magnolia Public School Date: Fri 3/10/23	Task		Inactive Task		Manual Summary Rollup		External Milestone		Manual Progress	
	Split		Inactive Milestone		Manual Summary		Deadline			
	Milestone		Inactive Summary		Start-only		Critical			
	Summary		Manual Task		Finish-only		Critical Split			
	Project Summary		Duration-only		External Tasks		Progress			





Magnolia Science Academy 5

SITE UTILIZATION PLAN

LEGEND

-  Erickson-Hall / IOR Trailer
-  Toilets / Wash Stations
-  Dumpster
-  **PHASE 1**
Classroom Building - Open August 2024
-  **PHASE 2**
Gymnasium - Open August 2025
-  Temporary Fence
-  Laydown and Material Storage
-  Limited Parking Spots





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9. Budget



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Driving Principals

Serving as your Lease-Leaseback Contractor puts Erickson-Hall in a partnership with the District, your project and program stakeholders as well as your design team. In this relationship, we have a fiduciary responsibility to minimize risk, provide long-term solutions, and to maximize construction value and quality standards within established budget and schedule parameters. Our Lease-Leaseback team takes "ownership" of District goals and objectives working cooperatively with transparency to deliver your projects within an agreed upon Guaranteed Maximum Price. We work hand-in-hand with project stakeholders to provide a level of service and expertise above and beyond expectation.

At Erickson-Hall we believe managing cost to maintain budget parameters starts with a thorough preconstruction process inclusive of many different factors that either directly or indirectly effect the end result. Our preconstruction phase services includes the following;

- Constructability Review and Bid-ability Review on revised scope drawings
- Additional Field Investigations if required (underground, in-wall, in-panel, etc.)
- Budget exercises to support project de-scoping efforts
- Additional Value Engineering Analyses
- Assist and support development of bid alternates and bid form
- Weekly Preconstruction Progress Meetings
- Construction Phasing/Sequencing Plan
- Detailed CPM Schedule for bidding purposes
- Review and assist with Contractor Pre-Qualification documents
- Instructions to Bidders
- Contractor Outreach
- Bid Comparison and Analysis

The methodology behind the preconstruction services we offer as pertains to budget and maintaining cost include key processes;

- » **Cost | Budget Review | Estimating** - Erickson-Hall will produce preliminary budgets for the project, including soft costs, design costs, construction costs, interim housing costs, etc. Developing a preliminary budget during the preconstruction phase will help guide the value engineering and cost estimating process. After identifying the maximum available funding, the second most important task will be the accurate estimation of projected costs for the project. As a General Contractor, we have extensive experience in conceptual, "soft bid" and "hard bid" estimating. This expertise in our Estimating Department carries over to the budget/estimate preparations for our lease-leaseback clients. Having knowledge of historical unit pricing, as well as current pricing from selected trade and specialty contractors, allows us to develop estimates that reflect the current bid climate. Erickson-Hall will develop the initial budgets in collaboration with DLR Group based on their initial designs. This will include quantifying the scope of the project and relying on historical cost data. As the final construction documents are developed, we will refine the estimates based on the design in progress and program requirements.

Delivery Method:	CM-MP
Project:	Magnolia Science Academy 5
Construction Management Firm:	EHCC
Target Construction Budget:	\$37,300,000
Construction Schedule:	117 Weeks (27 Months)
Pre-Construction Schedule:	12 Weeks
Close Out Schedule:	5 Weeks
Proposal Date:	3/14/2023



Scope of Services: Per RFQ/P

A) GENERAL & PRE-CONSTRUCTION PHASE AND B) BID/AWARD CM PHASE

Labor							
Employee Name	Job Title	PT/FT	"A" Hours/Wk	"B" Duration (in weeks)	"C" = "A" x "B" Total Hours	"D" Hourly Rate	"E" = "C" x "D" Total
Jorge Cruz	Project Manager	PT	16	12	192	\$ 151.00	\$ 28,992.00
Mike Carillo	Superintendent	PT	16	12	192	\$ 172.00	\$ 33,024.00
Mike Budd	Sr. Estimator	PT	40	2	80	\$ 185.00	\$ 14,800.00
Michelle Takemoto	Administrative Assistant	PT	8	12	96	\$ 75.00	\$ 7,200.00
SUBTOTAL							\$ 84,016.00

C) CONSTRUCTION MANAGEMENT PHASE

Labor							
Employee Name	Job Title	PT/FT	"A" Hours/Wk	"B" Duration (in weeks)	"C" = "A" x "B" Total Hours	"D" Hourly Rate	"E" = "C" x "D" Total
Mike Carillo	Superintendent	PT	40	117	4680	\$ 172.00	\$ 804,960.00
Perry Ko	Project Engineer	PT	40	117	4680	\$ 107.00	\$ 500,760.00
Jorge Cruz	Project Manager	PT	40	117	4680	\$ 151.00	\$ 706,680.00
Michelle Takemoto	Administrative Assistant	PT	20	117	2340	\$ 75.00	\$ 175,500.00
SUBTOTAL							\$ 2,187,900.00

D) CONTRACT CLOSE OUT

Labor							
Employee Name	Job Title	PT/FT	"A" Hours/Wk	"B" Duration (in weeks)	"C" = "A" x "B" Total Hours	"D" Hourly Rate	"E" = "C" x "D" Total
Jorge Cruz	Project Manager	PT	8	5	40	\$ 151.00	\$ 6,040.00
Michelle Takemoto	Administrative Assistant	PT	8	5	40	\$ 75.00	\$ 3,000.00
Mike Carillo	Superintendent	PT	8	5	40	\$ 172.00	\$ 6,880.00
SUBTOTAL							\$ 15,920.00

E) POST CONSTRUCTION FOLLOW UP

***Included at No Additional Cost

NON-LABOR GC COSTS

Trailer Lease Costs	N/A
IOR Trailer	N/A
Office Equipment (Copiers, Fax Machines, Telephones)	N/A
Installation/Delivery Costs - Trailer (Electrical, Telephone - voice-data, temporary toilets, project fencing security locks)	N/A
Fencing	N/A
Temp Sanitation	N/A
Dumpsters	N/A
Monthly Service Costs (Trailer, telephone expense, voice, internet, cleaning, drinking water, electrical, temporary toilets)	N/A
Reprographic Expenses for EHCC (Bid Sets & Trade Contractor Sets by Owner)	\$ 1,500.00
ProCore Document Control Software	\$ 51,800.00
Office Supplies (Reprographic: Plotter paper, manila folders, 3-ring binders related to District retained files)	\$ 5,750.00
Safety Supplies (Hard hats, Safety glasses, ear plugs, safety supply cabinet & refills)	N/A
Advertisements	\$ 1,500.00
Other Job Related Expenses (subject to advanced approval by the District)	\$ -
SUB-TOTAL NON-LABOR GC COSTS	\$ 60,550.00

TOTALS	TOTAL STAFF & GC COSTS	\$2,348,386
	FEE ON CONSTRUCTION - 3.75% of \$37.3M	\$1,398,750
	1% INSURANCE	\$37,471
	TOTAL CONSTRUCTION FEE	\$3,784,607


Hourly Rate Schedule for Additional Services:

Title	Hourly Rate
Project Executive/Director	\$215
Construction Manager	\$178
Project Manager	\$151
Preconstruction Manager	\$161
Asst. Project Manager	\$126
Project Engineer	\$115
Superintendent	\$172
Asst. Superintendent	\$124
Sr. Estimator	\$185
Estimator	\$159
BIM Manager	\$117
Scheduler	\$151
Field Administrator	\$75
Safety Manager	\$144

10. Insurance



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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

9/1/2022

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 Alliant Insurance Services, Inc. 701 B Street, 6th floor San Diego CA 92101 License#: 0C36861 ERICCON-01	CONTACT NAME: Susan Koelle PHONE (A/C. No. Ext): 619-541-4851 FAX (A/C. No): E-MAIL ADDRESS: Susan.Koelle@alliant.com	
	INSURER(S) AFFORDING COVERAGE INSURER A: National Union Fire Insurance INSURER B: Continental Insurance Company INSURER C: New Hampshire Insurance Compan INSURER D: Starr Indemnity & Liability Co INSURER E: INSURER F:	NAIC # 19445 35289 23841 38318

COVERAGES

CERTIFICATE NUMBER: 1983485850

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 GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:			5856940	9/1/2022	9/1/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			5717908	9/1/2022	9/1/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Comp. Deductible \$ 250
D	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$			1000587926221	9/1/2022	9/1/2023	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 PRODUCTS COMP. OP AGG \$ 10,000,000
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below Y / N <input type="checkbox"/> N / A			014195849	9/1/2022	9/1/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	Excess Liability - 2nd Layer Self Insured Retention \$0			FFX6081631144	9/1/2022	9/1/2023	Each Incident \$10,000,000 Aggregate \$10,000,000

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

Coverage: Builders Risk-All Risk (Flood and Earthquake excluded)
 Carrier: Illinois Union Insurance Company
 Policy Number: I21058671 012
 Policy Period: 9/1/2022 - 9/1/2023
 Limit Per Occurrence: \$40,000,000
 Deductible Per Occurrence: \$10,000

Coverage: Contractors Professional and Pollution Liability
 See Attached...

CERTIFICATE HOLDER

CANCELLATION

Evidence of Insurance	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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AGENCY CUSTOMER ID: ERICCON-01

LOC #: _____



ADDITIONAL REMARKS SCHEDULE

AGENCY Alliant Insurance Services, Inc.		NAMED INSURED Erickson-Hall Construction Company 500 Corporate Drive Escondido CA 92029-1353	
POLICY NUMBER		EFFECTIVE DATE:	
CARRIER	NAIC CODE	(Empty)	

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: 25 FORM TITLE: CERTIFICATE OF LIABILITY INSURANCE

Carrier: AXIS Surplus Insurance Company
 Policy Number: CM005110-01-2022
 Policy Period: 9/1/2022 - 9/1/2023
 Contractors Professional Liability: Each Claim Limit \$2,000,000; Aggregate Limit \$4,000,000; SIR Each Claim: \$25,000
 Contractors Pollution Liability: Each Claim Limit \$2,000,000; Aggregate Limit \$4,000,000; SIR Each Claim: \$15,000


Coverage: Leased / Rented Contractors Equipment
 Carrier: AGCS Marine Insurance Company
 Policy Number: SML93086066
 Policy Period: 9/1/2022 - 9/1/2023
 Limit - Per Item: \$250,000
 Limit - Per Occurrence: \$250,000
 Deductible - Per Occurrence: \$2,500

Evidence of Insurance.

11. Litigation



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Litigation Specific To Construction Projects:


Erickson-Hall has nothing to report related to termination for cause, litigation settled or judgments entered within the last five (5) years, nor have there been any civil judgments.

Erickson-Hall has never filed a petition for bankruptcy.

12. Additional Information



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What Sets **US** Apart?

Quality Control

Erickson-Hall will establish quality controls through project and performance requirements early in the program. This starts in preconstruction with the establishment of quality standards acceptable to Magnolia Public Schools and DLR Group. We will confirm that the contract documents clarify all quality standards and a quality control inspection program is instituted for the actual construction phase. Correcting deficient work is expensive and avoidable. As construction experts, our Construction Management team includes highly qualified, multi-disciplinary personnel who physically inspect work in place to ensure contract document compliance with the highest quality workmanship and accurate representation of the District's vision for the project.

With every project we perform Erickson-Hall identifies and assigns a quality control manager early on in the preconstruction phase of a project. This key team member is responsible for reviewing all project documentation including drawings and specifications at milestone dates during every phase of our preconstruction activities and developing a project specific quality control plan.

Once construction begins our quality control manager is on site on a regular basis to implement the plan developed and review the progress and installation quality of the work being performed. Reports are formulated at each visit for proper documentation. Any deviations to the plan or deficiencies in workmanship are identified and a corrective action plan is presented for fixing the immediate concern, thus safeguarding the issue of concern is not repeated.

Quality Control Plan Development:

A construction quality control plan ensures that you, our client, receive a finished project that addresses the specific need for which it was intended. The plan looks at specific areas of concern that could affect quality and outlines the ways to mitigate that risk. Implementing a well-managed plan can ensure that quality issues in workmanship are avoided, guaranteeing all materials and installation comply with the contract specifications.

Each plan is developed early on in the preconstruction phase with the team including the Client, Design Team and Inspector of Record (when available). Specific components of the project will be identified by the team that may require special attention in the materials and execution of the work, from there a detailed plan for that component will be created. Quality control tasks may include pre-installation meetings, first delivery inspections, mockups, first installation inspections, close-up inspections, and follow-up installation inspections. This Quality Control Plan will be included in the subcontractor bid documents assuring that all trades understand their role and responsibilities in the Quality Control process.

Third Party Quality Control Inspections:

In order to ensure adherence to the Quality Control standards we as a company have implemented, Erickson-Hall Construction employs a third party Quality Control Inspector to improve the quality of construction at all phases. Our third party Quality Control Inspector provides non-bias, detailed input from plan review to project close-out in order to focus on the quality control and quality assurance requirements set forth in the Quality Control Plan specifically developed for your project. The emphasis is to build it right the first time!



Safety

As of March 14, 2023 (due date for this RFP response), Erickson-Hall has operated for 14 years, 1 month, and 17 days without a lost time accident. Achieving this record is a monumental accomplishment. We have an Injury and Illness Prevention Program that complies with 8 CCR § 1509, and a Safety Program that meets CAL/OSHA requirements. Erickson-Hall has been recognized with regional and national First Place Construction Safety Excellence Awards. To avoid complacency and ensure our teams' focus remains on safe project execution, we operate a "Back to Basics" approach, concentrating on basic fundamentals of safety. Our safety record was not established on "luck" but by strategic execution of our safety program, starting with executive management.

- **Management Ownership and Involvement** - Management's ownership of safety is evident throughout the company with investments being made in innovative safety programs and continuous training in risk identification/mitigation, subcontractor safety oversight and emergency/crisis management. Our CEO and COO lead monthly superintendent safety meetings and project management team safety meetings, participate in mandatory safety training, and maintain permanent positions on the Safety Committee. As responsible leadership concerned with safety, they perform periodic safety audits on active sites ensuring project teams remain vigilant in the implementation of our safety program.
- **Risk Identification and Analysis** - Identifying and correctly analyzing potential risk is critical to ensuring construction is executed safely. Erickson-Hall's project teams conduct safety analyzes during project pursuits and develop construction execution plans during the preconstruction phase. Plans and specifications are reviewed for safety hazards associated with work scopes, i.e., fall protection, scaffolding, impacts to public safety, abatement, confined spaces, crane/heavy equipment requirements, etc. For all high-risk projects our safety personnel, along with outside subject matter experts, participate in risk identification/analysis to ensure all challenges to safe execution are addressed properly. Once safe work methods are determined and refined throughout development of the construction execution plan, they are enforced during construction through weekly progress meetings, daily huddles and weekly tailgates. If a project presents unique, complex construction components, we incorporate mock-ups in planning activities and consult with appropriate experts to review, confirm and validate our construction plan can be executed safely.
- **Preconstruction Safety Meetings** - Preconstruction safety meetings are to review safety protocol with all project stakeholders. Prior to subcontractors mobilizing onsite, we hold pre-coordination meetings to discuss overall work scopes, and throughout the course of construction, we hold additional pre-task meetings to focus on each definable feature of work and review/revise/accept subcontractor's Activity Hazard Analysis (AHA).
- **Weekly Safety Meetings** - Every superintendent at every Erickson-Hall jobsite holds weekly safety meetings to address hazards and reinforce safety requirements. Weekly safety meetings provide an excellent platform to consistently address safe work practices with the subcontractor workforce.
- **Unscheduled Safety Audits** - Erickson-Hall's onsite superintendent, our CEO, our COO, safety personnel, project executives, and a third-party safety consultant perform scheduled and unscheduled safety audits. All safety related information captured on a project is catalogued, analyzed, and shared with staff in ongoing safety training.
- **Task Design – Engineering Controls and Design for Safety** – An example of Erickson-Hall's commitment to safety is best demonstration by the following example. During a recent AHA review, Erickson-Hall's project team did not accept a subcontractor's crane pick plan because it showed the capacity load at 91%, a level too risky for existing jobsite conditions, work scope, high voltage, and high wind conditions. Our project team and our in-house safety manager worked with the subcontractor to develop a new pick plan utilizing a larger crane and bringing the load capacity down to 73%. This plan was more efficient and resulted in a safe pick execution.
- **Worker Engagement, Involvement, and Participation** - Safety is not just a supervisor's responsibility; every individual must accept ownership. During initial preconstruction meetings held with subcontractors, this point is emphasized. Our "daily huddle" provides the forum for project supervisors to reiterate that each person is accountable for safety regardless of job role. At these meetings project supervisors remind all jobsite personnel that they are empowered to stop unsafe work and are expected to alert a supervisor if they have safety concerns.
- **Safety Training and Validation of Training** - Erickson-Hall's emphasis on safety begins during the hiring process and continues into new hire orientation with a focus on the company safety philosophy and expected performance standards. Our new hire orientation begins with 3-days at our corporate office; regardless of an individual's prior experience. The 3-day process allows for basic safety training and is accompanied by meetings with a Mentor for a duration of at least 6-weeks to aid with



ATTACHMENTS - SAFETY

continuous learning of our company processes, culture and safety expectations. We have multiple check-ins with the new employee to validate trainings; at 2-weeks, 30 days, 45 days, 60 days and 90 days. As a minimum safety training standard, executive management and superintendents are OSHA-30 certified. Every other employee is OSHA-10 certified, and all employees are fully trained on Erickson-Hall safety policies, Code of Safe Practices, Ergonomics, Defensive Driving, Heat Illness, and CPR/First-Aid with use of an AED to ensure projects are staffed with "People Producing Safely."

Due to the wide range of training resources available and constantly evolving regulations, all employees are required to take monthly safety courses as part of their continuing education. With multiple regulation changes within the past few years, we recently held an OSHA-30 course for all superintendents and executive management (a total of 45) as a refresher to ensure compliance. Our superintendents participate in Competent Person Training for fall protection, scaffolding, trenching & excavation, confined space, etc. All safety related information captured on a project is catalogued, analyzed, and shared as "lessons learned" for safety training during superintendent/project management meetings.

Using our "Back to Basics" approach, we restructured training classes to the learning atmosphere. For in-house training we offer detailed/more specific training in class sizes not to exceed 15 persons. This has proved effective offering a more comfortable environment for asking questions and increased opportunity for one-on-one instruction. This method has resulted in accelerated learning growth and retention.

- **Subcontractor Management** - Subcontractor safety management begins prior to mobilization with review of subcontractors' jobsite-specific IPPP, as well as the requirement for their participation in pre-coordination meetings, AHA submissions, pre-task meetings, and verification of employee training certifications. Throughout construction, our onsite superintendent conducts mandatory daily huddles, weekly safety meetings and weekly foremen meetings, oversees all subcontractor safety practices and recognizes subcontractor employees who have demonstrated exemplary safety awareness and performance.

As a general contractor we believe it takes an entire team to complete our projects on-time and safely. As team partners, if a subcontractor needs assistance, we are there. During a recent preconstruction meeting and plan review, we noted that a height permit was required. The subcontractor was unfamiliar with this process, so Erickson-Hall assisted the subcontractor throughout the permit

process, including meeting with the Cal/OSHA office representative alongside the subcontractor. This showed our commitment to the subcontractor and validated our team partner relationship.

- **Emergency and Crisis Management** - A critical component of our safety program is emergency and crisis management of which communication and training is vital. To assist with the development and training of our procedures, we have established relationships with a variety of local First Responders from the Fire Department, Police Department, California Highway Patrol, and Special Weapons and Tactics Team. We have implemented annual training for employees and family members to assist in the awareness of Fires, Emergency Situations, Defensive Driving, and Active Shooter Scenarios. At the on-set of project mobilization, our teams invite First Responders to tour our jobsites, review emergency protocols and ensure paths of travel provide easy access for emergency vehicles. Considering a majority of Erickson-Hall projects are executed on occupied school campuses, our project teams meet with school representatives to incorporate their procedures for fire, earthquake and lockdown drills into our emergency action plans. Once construction is underway our jobsite crews become active participants in campus drills. This commitment to understanding and participating in school drills has proven essential on several occasions when campus lockdowns went into effect in response to active shooters in close proximity to project sites.
- **Safety Staff** - Resumes are provided in this section for Erickson-Hall's Corporate Safety Director and Safety Manager.
- **Cal/OSHA of Federal OSHA Findings** - Erickson-Hall has had no (-0-) Cal/OSHA or Federal OSHA findings against our firm in past 5 years. Our current EMR is 69%.
- **LWIR / RIR / EMR Rate Past 5 Years**
 - » **2021** - LWIR -0- . RIR -1- . EMR 67%
 - » **2020** - LWIR -0- . RIR -1- . EMR 63%
 - » **2019** - LWIR -0- . RIR -0- . EMR 62%
 - » **2018** - LWIR -0- . RIR -2- . EMR 70%
 - » **2017** - LWIR -0- . RIR -3- . EMR 67%



ATTACHMENTS - COLLABORATIVE SOLUTIONS

Collaborative Solutions

An opportunity to serve our clients comes with every project. Experience has demonstrated that we have the greatest impact on a project when we collaborate with a school district and their design team(s) during a project's early stages. Overall project success, whether optimizing value, controlling costs or meeting aggressive schedules, relies not only on our professional capabilities but also on our collaborative approach to specific project challenges. Our Construction Management Team will take "ownership" of District goals and objectives established for every project and will work in cooperation and transparency with the District and design team(s) to ensure each project is completed within established cost, schedule and quality parameters.

We have been successful throughout our history assisting districts and design teams resolve budget and schedule challenges without impacting the architect's aesthetic design intent or functionality of the building systems. Our teams work diligently to ensure decisions made during preconstruction are accurately implemented in the field. The case study provided in this section showcases a project where Erickson-Hall's efforts during the preconstruction phase resulted in significant cost and/or time savings ensuring these projects completed on time or ahead of schedule and within established GMPs.

Lincoln Middle School Classroom Building Santa Monica-Malibu Unified School District \$16.2 Million

Erickson-Hall managed the demolition and abatement of an existing 50-year old building and new construction of a 2-story, 32,000 SF classroom building. The project was completed on time and on budget.

» **Value Engineering** - The original project design was millions over the District's budget. The District's goal was to reduce the project costs within budget while keeping all structural and aesthetic elements intact, which was a key factor for the community. Preconstruction efforts encompassed months of value engineering meetings in which several value engineering items were proposed and incorporated, reducing the overall project costs by 20%. A few significant value engineering items included:

- Substitution of a custom temporary sound system to standard sound blankets - \$542,679 cost savings
- Substitution of excess custom metal signage to standard signage - \$60,000 cost savings






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At Erickson-Hall Construction Co., honesty and integrity are the guiding principles in everything we do.

Our goal is to consistently maintain the highest ethical standards resulting in trust among clients, trade contractors, architects, and other industry professionals.

**We Build More Than Buildings
We Build Relationships**

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