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Request for Proposals for  
**Program Management Services**  
for Construction Projects

RFP No. 2021-BUSo1



August 27, 2020



August 27, 2020

Kolvira Chheng, Assistant Superintendent  
Alum Rock Union Elementary School District  
2930 Gay Avenue, San Jose, CA 95127

## **RE: Request for Proposals for the Selection of Consultant to Provide Program Management Services for Construction Projects | RFP No. 2021-BUS01**

Dear Mr. Chheng and Members of the Selection Committee:

As an experienced program and construction manager with a solid foundation in general contracting, Kitchell is known for delivering quality programs and projects while providing high value services to California school districts. It is with this attention and focus we know we can provide top quality services for the management and construction of your capital program. Our team will bring over 100 years of collective knowledge, experience and lessons learned.



### **FIRM EXPERIENCE**

With 70 years of success in delivering a wide range of programs and projects as both a general contractor and a program and construction manager, we understand the complexity and technical expertise required to deliver your program and projects. Kitchell has proven experts who are qualified to deliver Alum Rock USD's multiple projects in the most effective manner. As a leader in California education construction, **we have completed more than \$14.7 billion in education construction** and managed more than \$45 billion in public works projects. As a total building solutions provider, **our services for the education sector encompass more than 1,500 projects for more than 50 clients.**



### **A DIVERSE AND EXPERIENCED TEAM**

This team was assembled for their knowledge and experience working on many South Bay school district programs using every permissible delivery method. Each team member has specific experience that will benefit the District and your projects through each project phase.

- ▶ **Regional Executive Arturo Taboada**, has over 30 years of industry experience, including extensive experience with K-12 facilities. His range of expertise spans various delivery methods including single and multiple-prime, among others, for programs valued in excess of \$1 billion. He will oversee the effort at Alum Rock USD and will provide the resources to deliver this important program.
- ▶ **Program Director Patricia Nguyen** has an extensive history of K-12 expertise and will serve as the project leader on this effort. She has worked in several districts in the South Bay, including San Jose Unified School District, Cupertino Union School District, East Side Union High School District, San Francisco Unified School District as well as others and is in tune with the marketplace in the area.
- ▶ **Project/Construction Managers Omar Galvan and Amanda Castruita** have a wide-range of education experience, and will manage projects as these are assigned to our team. Omar will lead the facilities assessment report validation with our in-house staff and resources, while Amanda will coordinate the many other tasks required to move the program to implementation. Both Omar and Amanda have worked on many educational and DSA projects and programs, therefore bring unparalleled experience to this effort.



## DEPTH OF RESOURCES

Unique to Kitchell is our **in-house team of engineers, architects, commissioning agents, schedulers, estimators and facility managers.** This team is available as a resource to our program/project managers to provide subject matter expertise through every phase of your program.

Our team members bring unparalleled experience in the region and the marketplace. We will listen to the District, bring our lessons learned, and dedicate our strong leadership and collaboration with all of the District's stakeholders throughout the program. Our common goal at the outset will be to review and validate scope, estimates and schedules based on realistic market conditions, and organize a construction program that meets the expectations of the District.

Our team is committed to providing the Alum Rock Unified School District with the highest quality of service. We appreciate your consideration and look forward to the opportunity to personally demonstrate our qualifications and provide the highest degree of dedication, service delivery and enthusiasm.

Sincerely,

Wendy Cohen  
President

*Authorized officer for the firm*

Arturo Taboada  
Regional Executive

## REQUIRED INFORMATION

### SOQ/P Title

Request for Proposals for the Selection of Consultant to Provide Program  
Management Services for Construction Projects

### Due Date

August 27, 2020

### Firm Name

Kitchell

### Address

99 South Almaden Blvd., Suite 600  
San Jose, CA, 95113

### Phone

510.239.1790

### Fax

916.648.6534

### Contact for Proposal

Arturo Taboada, Regional Executive  
tel. 510.239.1790  
ataboada@kitchell.com

### Type of Services to be Provided

Kitchell will provide program and construction management services. Kitchell is not co-responding with another firm, therefore 100% of services will be allocated to Kitchell.

### Required Forms

Required forms are included in the Appendix section.



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*\*Not included in the 25 page limit*





# Description of Firm



70 years



322 Employees



10 offices throughout California



OUR SAN JOSE OFFICE  
IS JUST 17 MILES FROM  
ALUM ROCK USD!

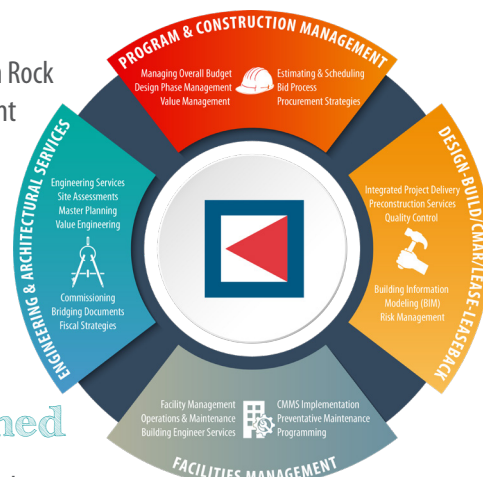
## Kitchell Background

Kitchell, a **100% employee-owned company**, was established in 1950 with the purpose of providing construction management and general contracting services in the Western United States. As the construction industry grew, Kitchell recognized the need for improved, flexible methods for meeting construction challenges. The firm's innovations in management and its reliability in delivering projects on time and within—or under—budget soon earned us a reputation for superior performance.

Kitchell provides project and construction management services primarily to the public sector. Since our inception, we have completed **over \$45 billion in public works construction representing more than 3,000 public sector projects**. These projects include K–12 schools and higher education facilities, courts, municipal office facilities, parking structures, civic centers, detention and criminal justice, healthcare, sports, police and fire stations, and performing and multicultural arts centers.

## Kitchell Services

Kitchell offers the flexibility necessary to provide Alum Rock USD with highly professional construction management services. With a full complement of in-house services necessary to meet any public agency's goals and objectives, we can supply specialists in services ranging from early planning and conceptual estimating through post-construction inspections, warranty periods and facility management.



## Nature of Work Performed

Kitchell has a thorough understanding of the obstacles our educational clients face when modernizing, renovating or replacing education facilities. We understand the need to review and validate the plan, as well as the need to start the work and make progress to demonstrate “your bond dollars at work.”

# Approach to Meeting District's Needs

Kitchell will implement a work plan that supports the mission of the Alum Rock USD and aligns with your program and project objectives—resulting in a more cost-effective process that achieves your goals. Kitchell will review and evaluate the District's facilities assessment report by EMG, dated June 14, 2018 to analyze and benchmark the needs assessed in 2018 to 2020/2021 pricing. Further, **Kitchell will review the five priorities outlined in the report and identify opportunities to group potential repairs by trade within groups of schools with the same characteristics, or using other packaging methods to achieve savings in both design and construction.**

For this effort, Kitchell brings three key advantages to the District:

- ▶ Kitchell's **in-house estimating group** has a robust database of school improvements in the Bay Area developed and maintained over the last 27 years.
- ▶ Our **roots are based in general contracting**. This experience adds significant value to the District because our cost analysis approach is based on actual understanding of structuring scopes of work, not just quantity estimating.
- ▶ **Our presence in the South Bay for over 27 years and our reputation managing school construction programs**, is known by the contracting and subcontracting community, which **attracts the best and most qualified contractors and professionals in the region**.

These three key factors will bring significant value to the district in the form of updated and accurate pricing, common sense scoping and bid packaging, as well as competitive pricing from local and regional contractors.

## Program Management Services

Our goal is to work with the District on overall scheduling, budgeting and communication for all capital projects and report to the District on program and individual project status on a regular basis.

**Our approach to program management begins with working with the District to review and evaluate previous studies to determine its needs update information.** Based on the updated information we prepare a preliminary scope and budget, which will be reviewed with the District. Once the scope and budget are adjusted we organize the options for sequencing the projects to optimize the timing and delivery method of the projects. Upon completion of these tasks, with the District input and participation, we will develop a master program budget and schedule, which will culminate with a Program Implementation Plan (PIP). This plan will be presented to the Board of Education for final review and approval.

## Integration with District Staff

**Our team comprised of Program Director Patricia Nguyen and Project/Construction Managers Omar Galvan, and Amanda Castruita** will work as an extension of your staff—including administrative officials, assistant superintendents, facilities director, operations and maintenance staff, District's program and project managers, teachers and site principals—providing the necessary specialized resources to achieve successful project delivery. To ensure this, we will seek formal and informal feedback to understand the issues meaningful to your staff and create a corresponding strategy to meet your expectations. Members of Kitchell's executive team will meet with key Alum Rock USD staff members periodically to solicit feedback on subjects, such as communication, responsiveness, attitude of personnel, problem solving and value of services. This process, conducted in an atmosphere of objectivity and openness, has enabled us to continually improve our service delivery and instill an atmosphere of partnership.

## Meet with Key Staff to Understand District Work Flow and Project Requirements

One of the first things our team will do is meet with key District staff to understand specific needs and requirements of your program and projects. This may include tours, meetings with the District's FMP Architect, and the project design teams (current and future ones), and spending time with key stakeholders to ensure our understanding of the needs and requirements align with the rest of the project team. We will also want to fully understand certain challenges and develop work plans to identify remedies for these upfront.

## Dedicated Team

A successful construction and modernization program requires the right people, strong leadership, an organized detailed implementation plan, and a collaborative partnering approach that addresses the complexities of each project and the entire program proactively. We do this by offering a qualified and experienced team and using our established policies and procedures as a basis to develop the most effective approach that meets the needs of Alum Rock USD, while working within your guidelines.

At Kitchell we pride ourselves on having the full complement of in-house services necessary to meet your program and construction needs. We readily supply expertise in services ranging from early project planning and conceptual estimating through building construction, post-construction and warranty phase follow-up. Because of our specialization in public sector projects, all of our personnel are experienced in working with public agencies. This experience has taught us the most successful projects involve

healthy teamwork, which is comprised of all project entities—the owner, architect, construction manager, contractors, stakeholders and governing agencies—and it is imperative to understand the underlying mission and goals of each group.

## Roles & Responsibilities

Clear understanding of each team member's roles and responsibilities will establish clear performance expectations and eliminate confusion. We recommend the use of a tabular responsibility matrix defining the roles and responsibilities of each member on the project team. This effort will help identify potential conflicts and omissions of activity before they become issues. It will also allow each team member to see a snapshot of their responsibilities and how they relate to other team members. We will conduct a program kick-off meeting once the entire program team is established to convey these roles and responsibilities.

## Review, Analyze & Validate Project Priorities & Estimates. Develop the Program Budget

Alum Rock USD has already developed project priorities and estimates as illustrated in the facilities assessment report and master plan. **Kitchell will bring its specialized resources to review and analyze project priorities to determine if the assumptions are still valid and to test the estimates in the current market conditions.** This analysis will determine if there are elements of the program that need to be updated. If there are cost impacts, we would highlight the issues and present options to “re-balance” the specific project budget. More importantly, our team will bring our experience as builders to help determine the scope packaging optimization. This effort entails the grouping of projects in a manner that optimizes the effort and cost of grouped trades, thus reducing certain fees such as the overhead and profit of a general contractor. **At San Francisco Unified School District we grouped the work of a roofing and HVAC contractors to coordinate their sequence of work. The result was a single disruption to the roof, coordination of waterproofing and equipment penetrations, and a 13% savings on the mark-up of a general contractor.** We will review the entire list of priority projects throughout the District and prepare a series of options to undertake the work. Each option is presented with a preliminary schedule, including site impacts, and an updated budget.

## Program Budgeting

The first step in meeting program budgets is to evaluate the current assessment plan and estimates as noted above. **Kitchell has performed this task at numerous local school districts, including San Jose Unified, Cupertino Union, Milpitas Unified and Fremont Union High School Districts, to name a few examples.** The process includes a verification of the project scope and determination if the current estimates match the current costs within the industry. Having a thorough

understanding of the detailed components of the program budget is an essential step in our ability to diligently manage the cost component of the program.

As we move through the various phases from planning and implementation to design and construction, this document will be the basis for our cost control process. Kitchell will work with ARUSD to validate, define and document the program budget, as well as the factors and assumptions made in its establishment. **Once defined and established, Kitchell will work with ARUSD to prioritize the program budget in order to help the decision-making process.** We will utilize our internal program software to track the budget from a micro-level for each project to a macro-level for the overall program. In addition, we will establish contingencies for the overall program and for each project. The contingencies will be utilized to create flexibility and protect against unforeseen market conditions.

## Program Master Scheduling

Kitchell will work collaboratively with the project team in the development of a project master schedule that identifies each component of the program with milestones. Apart from our monthly reporting, the master schedule will identify all key activities for each project at each campus that will then be rolled into a master program schedule to create the benchmarks for the overall program schedule. The activities will include key milestones, consultant procurement, agency coordination, move-in, design, DSA approval, bidding and construction. Throughout the program, we will measure progress against the master schedule on a monthly basis and make adjustments, if necessary. Our program master schedule will provide information in a concise, clear and effective format. Careful monitoring and regular reporting of activities against this schedule will provide early information about overall progress.

Through our systematic schedule control process, we will provide timely information about overall progress, potential delays and mitigation strategies. **We will regularly review and monitor progress of consultants' and contractors' progress against the scheduled milestones, and will take all necessary actions to prevent, minimize or recover from delays.** Potential delay issues will be mitigated through active communication and intervention with District staff, the design team, contractors, utility providers, regulatory agencies and others as the needs dictate. We utilize regular design and construction progress meetings as a forum to discuss the status of the schedule with the project team and collaborate on strategies to meet the schedule milestones.

## Communications & Project Procedures

Effective communication of relevant and accurate information on a daily basis ensures all members of the project team are informed of decisions, changes and the status of the program. **Our project team**



**is an extension of your staff to provide leadership and a sense of urgency to your project; therefore, each team member will treat this project with a sense of urgency, efficiency and purpose.**

Program Director Patricia Nguyen and Project/Construction Managers Omar Galvan and Amanda Castruita, will lead the project team and will meet regularly with the District and all other project team members to move the program forward. They will create a professional working environment for all individuals involved, this will ensure full participation and productivity of qualified technical professionals with the expertise required to complete successful projects. Along with establishing published project procedures, we consider meetings an effective means of collaborating on ideas, resolving issues, building relationships and reporting information in a relational environment. Furthermore, we understand during times of change, employees may become very anxious. We will work with your team to develop the appropriate communication strategy for your employees to keep them apprised of the status of the projects. We tailor our program and project management plan based on the District's policies and procedures and ensure other stakeholders, including the design and inspection team, accept it. Our plan will define specific action plans and deliverables for each of the program and project phases from preconstruction to close-out.

## Inspections & DSA

**Kitchell staff has worked on 1,500 educational projects covering community college districts and K-12 schools**, giving us a high degree of experience with the Division of the State Architect, the Uniform Building Code and Title 24 of the California Code of Regulations. Because of our specialization in public sector and education projects, our staff is experienced working with all these agencies. This experience has taught us it is imperative to understand the underlying policies and goals of each group.

Kitchell is a designated DSA plan checker, giving us an excellent working relationship with the agency. We have been working with DSA for over 30 years on a variety of project and are familiar with DSA expectations, procedures, and processes. Our staff will use this familiarity to maximize program performance, value and expedite DSA review time. Our team works closely with the architects and contractors to ensure timely completion and submission of plans and specifications to DSA.

## Local Agencies & Public Utilities

In addition to the various State agencies that regulate school construction and funding, there are several local agencies—particularly City and County planning commissions, local fire marshal and utility companies—that may affect building programs. At the local level, Kitchell routinely coordinates with these agencies throughout the design and construction process to ensure the project stays on schedule and receives the required permits (if needed) and approvals. Coordination with the public utility companies is extremely important. We are well aware of the time frames associated with utility engineering, inspection and payment process. We use checklists to ensure we are coordinating with utility companies in a timely manner. If we

are installing a new power service to the site, we begin to coordinate work with PG&E at the start of the project because this coordination can take up to a year before it is approved for installation. We also ensure coordination requirements related to each one of the trade contractors are reflected in the general contractor's scope documents.

## Other State Agencies

Our team also has deep experience with all of the State agencies including the Department of Toxic Substances Control (DTSC), the California Department of Education (CDE), and the Office of Public School Construction (OPSC).

As the facilities assessment report highlights the new construction of various buildings within the schools, we will provide advice on both CEQA and DTSC. **We have done this type of work in many districts throughout California and are familiar with the consultants that provide support services for these studies and the processes and agencies that review these matters.**

We have also managed and process many State-funded projects through OPSC and CDE to assist our clients in obtaining State funds. At this time, even though Proposition 13 failed in March and new funds are not available, it would be prudent for the District to follow the steps (if the projects are eligible) to position itself to obtain future funding. If there are opportunities for the District, Kitchell will make sure these are maximized to leverage your local bond funds.

## Program Implementation Plan

The Program Implementation Plan (PIP) is the centerpiece of our mobilization strategy. We use it as a means for documenting our program expectations, defining goals, developing site master plan strategies, creating priorities, grouping projects for cost savings, determining the best contracting strategy and establishing budget and schedule metrics. This tool will help facilitate the ground rules for decision making, communications and reporting for the entire program. We facilitate and document the discussions, allow for optimal transparency, derive consensus and document decisions within the PIP document, which then serves as the basis for our management of your overall program.

## Program Management Plan

As the PIP is the overall road map for the program, **the Program Management Plan (PMP) is the actual operational process that outlines in detail how the projects will be managed.** Kitchell will work closely with the District to develop project management procedures, a construction management plan, a communication plan, and project budgets and schedules coordinated with project protocols and metrics established in the PIP. Throughout the projects, we will report progress and recommend adjustments as required to meet your goals. **The key elements of a Program Management Plan are highlighted below:**



- ▶ Program and team charter & goals
- ▶ Roles and responsibilities matrix
- ▶ District and project policies and procedures
- ▶ Team collaboration and communication tools and plan
- ▶ Program and project controls plan
- ▶ Program and project risk management plan
- ▶ Program and project budgets
- ▶ Master program and project schedule
- ▶ Phasing & logistics plan including laydown area
- ▶ Site specific safety plan guidelines

## Design/Preconstruction Phase Services

**Planning is the first key to success.** Our goals in preconstruction include working with all parties to plan the work to minimize any unknowns or discrepancies that could create possible changes and/or downtime during construction; and to maximize the value of investment dollars. Kitchell will achieve this by implementing a QA/QC program designed to support architects with accurate feedback on systems design, allowing the team to make choices about the longest lasting systems. We will provide estimates and constructability reviews during the preconstruction phase with suggested ways to minimize the issues before they become issues on-site. Kitchell has long held a lean approach and believe it's the most effective way to execute a project. That has led to our working with designers on highly complex projects using BIM to align all the details of the project.

## Validation of Existing Conditions

Working with the District, Architect of Record and facilities staff, the Kitchell team will work collaboratively to investigate, survey and identify existing utilities, site constraints and any existing conditions to be incorporated into the design development process. Prior to commencing any work, we will coordinate with the District to carefully determine precise locations and depths of all utilities, including service connections, shown on the as-built plans and marked in the field, which may affect or be affected by the construction operations and new project design. Any discrepancies will be noted and updated in the District's electronic as-built archive files. It is vital to provide trade contractors with accurate information about the site prior to the start of construction.

## Design/Constructability Review

Kitchell's Engineering & Architectural Services (EAS) Department has provided over 5,000 peer design/constructability reviews for public sector construction projects, managed hundreds of architectural and engineering design projects, and performed design and constructability reviews for most of the programs and projects we have managed. Constructability reviews are an effective quality control and cost management tool typically used during preconstruction and includes review of contract documents,

plans and specifications, to ensure the project can be built cost effectively as designed and contract documents are sufficiently developed to avoid unnecessary change orders. **Constructability reviews often address the following items:**

- ▶ Construction efficiency of planning concepts, design and materials used
- ▶ Contracting strategy to ensure bidder competition and cost-effectiveness
- ▶ Analyzing site layout, equipment use and construction logistics
- ▶ Examining ease of operation, systems requirements and maintenance needs
- ▶ Contract documents review to identify ambiguities, errors and oversights

## BIM Review

BIM is an effective portal housing multi-disciplined information to facilitate best solutions for a project's design and construction challenges. Estimating, scheduling, sequencing, site logistics, design progression and detection of interferences, clashes and conflicts, virtual mock-ups, and more, are integrated before the start of construction. We want to coordinate the HVAC, plumbing, fire sprinklers, technology routing and electrical to ensure we minimize the clashes and expedite the material production and installation.

Our expert team of estimators extracts critical elements from BIM to create parametric data incorporating materials, types of construction systems, methods, assumptions and products to establish estimates. The BIM models give us the ability to do quantity take-offs for materials and equipment necessary to construct cost effectively while delivering optimal quality. Using BIM ensures there is no duplication of efforts—saving your project money and time. Also, with this approach, issues and components are consistent through all phases, leaving no chance they are left out with a re-draw of the models. This improves the quality of the field work which equals more safety and higher quality for all finishes and for the overall project.

## Value Analysis

We will conduct value analysis (VA) sessions during preconstruction phase. Value analysis in the construction industry brings together professionals from a variety of architectural and engineering disciplines in order to maximize the benefit and value of each dollar spent on the project. It is a systematic approach used to gather information, develop alternative ideas, evaluate options and offer meaningful recommendations to the client. The participants in the VA workshops should be comprised of the designers of record in each major discipline, facilitators, user groups, administrators, operations and maintenance personnel, and an executive who can authorize the implementation of the VA proposals. The methodology includes seven phases for each VA session: information, functional analysis,

speculation, evaluation, development, reporting and follow-up monitoring.

## Budgeting & Estimating

Our staff of estimating professionals is capable of performing quantity surveys and verifying unit costs in all trades. We provide an in-house quality control review of each estimate produced. In fact, our review approach has allowed us to perform estimate reviews and reconciliations of estimates from other estimating consultant firms without performing an entire independent detailed estimate. Our team relies on in-house historical cost data and knowledge of the local bidding climate in the Bay Area. If it appears that the project construction budget will not be met, we advise our client and design consultants and make recommendations for corrective action, and when appropriate, “structured” value analysis sessions are conducted. We also have an excellent track record of forecasting market conditions that impact construction costs, trade labor and material availability, geographic or seasonal considerations and more.

## Preconstruction Phase Cost Control Measures

We will review and validate the current estimates and work with the design team to reconcile any areas of concern. Depending on the nature of the work, we will ensure the appropriate scope gets packaged in a manner logical and attractive to bidders in the current market. Our estimators will develop specific cost estimates to each of the bid packages considering the site condition, design documents and developed scope packages, and adjust and suggest value engineering items to make the project budget more effective

## Construction Phasing and Logistics Strategy

With the District and the school administrative staff, the Kitchell team will work collaboratively to develop a phasing and logistics plan that will minimize any operational impacts to the education environment as well as surrounding community. We also make sure this is reflected in the scope documents for each of the bid packages and trade contractors’ responsibilities related to the phasing and site logistics are clearly defined. As the projects progress, we analyze, strategize and adjust the phasing plans to optimize construction progress. Our project team has extensive knowledge of working on active public school campuses and will develop work plans that adapt construction to suit the needs of the students, faculty and staff.

## Project Logistics Plan

The projects logistic plan is prepared by Kitchell and presented to the District to ensure all site constraints and limitations are properly addressed and ongoing operations are respected. The plan will take into consideration and include items as follows:

- ▶ Faculty, staff, students, community members and project team member safety
- ▶ Project phasing to allow continued occupancy
- ▶ Managing noise and dust
- ▶ Developing a site-specific plan for construction parking and traffic, including relocation space
- ▶ Developing a materials management plan that includes staging and materials transportation
- ▶ Establishing well-marked alternative routes during construction, and managing additional staging and phasing of construction around special events
- ▶ Maintaining public and staff access to the campus
- ▶ Avoiding disruption to the campus’s existing daily function

## Bid Phase Services

Our team will work collaboratively within the District’s procurement process during this phase of the project. Kitchell’s involvement in the bid phase will begin with the preparation of the bidding strategy approach, containing the final bidding schedule, project/budget packages, narratives, final cost estimate reconciliations, milestones, marketing strategy, liquidated damages analysis and recommendations, notice to contractors, supplementary conditions, identification of supplemental information available to bidders, and complete Division 1 specifications. We will also schedule and lead pre-bid conferences and site walks as well as be responsible for collecting all bidder questions and directing the A/E in the preparation of addenda.

## Bid Packaging Strategy & Preparing Bid Documents

Depending on the scope of work and other factors, Kitchell will recommend a strategy to accomplish the work including the appropriate delivery method. Accordingly, we will package and bid the work in the best interest of the projects and ARUSD. **Because Kitchell is both a professional service organization and a general contractor, we can approach your projects with the best perspective to maximize bid effectiveness, inclusion of local contractors and trade contractors and complete coverage of your documented scopes of work.** Through the use of a “scope matrix” we ensure total scope coverage without overlaps. When six or more bids are received, the bid price is typically 5% to 15% less than when only three or less bids are received.

## Bid Analysis

On bid day, Kitchell will assist the District in receiving the bids and tabulate bid results. Kitchell will review for compliance with the requirements of the bid documents, the completeness of scopes of work, and perform due diligence including various verification checks of the apparent low

bidder(s). The reported bid prices are then compared to our reconciled cost estimate and cost database to determine if all project work components have been included in the contractor's bid. Based on this study, Kitchell will prepare a bid analysis report for the District that includes a recommendation for contract award.

## Construction Phase Services

Construction is the realization of your vision and the shared efforts of your design and construction partners. **Our goal for the construction phase of the project is simple: execute.** Kitchell's efforts during preconstruction will prepare the team for a project free from surprises.

During this phase, Kitchell will serve as the District's advocate by communicating the overall goals and monitoring work with the architect, contractor, inspector of record, staff, and all stakeholder staff departments so that project challenges can be expedited and reasonable solutions can be explored and chosen. This communication, coupled with our commitment to collaboratively and productively resolve issues, generates an atmosphere of healthy communication resulting in a true sense of ownership for the success of the project.

## Supervising & Directing the Work

With the support of the entire Kitchell team, Patricia Nguyen, Omar Galvan and Amanda Castruita will supervise and direct the work in the field. As experienced and capable construction managers, they will have a thorough and comprehensive knowledge of the contract documents, applicable codes, project schedule, budgets, and your site, and will ensure all work is executed safely, correctly and timely. This also includes coordinating, leading, and reporting on all meetings and status updates to the District on the progress of the project. When requested, photos may accompany the distribution of meeting minutes.

## Project Document Controls & Coordination

We understand the importance of sound project management practices, good record keeping and timely reporting in facilitating project success. Our management tools and software programs aid in keeping projects on time, on budget while meeting the District's quality standards. Our project controls practice is to implement processes and procedures which successfully drive project-critical activities to completion. This practice includes planning, scheduling, well planned prime trade contractor preparatory meetings for critical construction activities and assemblies, communications and construction cost control, as well as the application of work processes such as cost and schedule progress reporting procedures. We will lead the project team to address and mitigate corrective action plans and schedule recovery. We will oversee trade contractor coordination with the on-site inspectors. All inspections will be scheduled in advance to avoid delays in the follow-on work activities by pre-coordinating the

inspection activities in the master project schedule that will support the requirements of the Inspection Department. We also perform observation during our normal course of activities while on-site. Any problems or issues identified by the IOR will be addressed with the project team proactively as they occur.

We understand information processing is time sensitive during the construction process. **Kitchell will work with the District and the project team to implement a web-based mobile access system to track and access posted drawings, RFIs, supplemental instructions, CPM schedules and submittals.** This will allow the project team to communicate any issues and move quickly to resolve them.

Kitchell's submittal activities will begin before construction starts. Kitchell will work with the prime trade contractors, the District and the selected project team to ensure submittal requirements are fulfilled and tracked in the project administration software and in the master project schedule. This enables the project team to work from a submittal schedule tied to master project schedule dates. The project team can utilize the computerized submittal schedules and submittal logs to mitigate potential delays.

## Project Controls

Kitchell has developed an effective method for managing projects, sharing information and collaborating with all participants in a project through the creation of Kitchell's Kloud software. Kitchell's vision of integrated systems delivers a comprehensive set of technologies that are designed to work together to fulfill the complete project life cycle. The Kloud leverages the power and flexibility of Microsoft SharePoint Services to provide a full set of plug-and-play enterprise services, Primavera, Timberline, smart client applications, and industry-leading development tools to produce superior results.

## Construction Progress Meetings

Along with the establishment of published project procedures, we consider meetings an effective means of collaborating on ideas, resolving issues, building relationships and reporting information in a relational environment. To memorialize important statements made and actions required, concise and accurate meeting minutes issued in a timely manner are just as important as the meetings themselves. **We adhere to Kitchell's 48-hour turnaround policy on issuing meeting minutes.**

## Safety

Kitchell firmly believes in the importance of maintaining a safe work environment so every person who comes to work on our projects returns home at the end of their shift in a healthy and uninjured condition. We believe a clean, organized and safe job site leads to excellent morale, excelled productivity and quality production, as well as saving on the more apparent losses due to accidents. We will ensure the contractors produce

a job-specific safety plan on each of our projects, discuss safety at each of our construction meetings, require a pre-task analysis and planning for critical events (such as crane picks), require weekly tool box safety specific meetings for all field personnel, conduct frequent safety inspections by both project and home office personnel, and live by a zero tolerance policy for unsafe acts or practices on our job sites.

**Protecting your community and staff from construction activities is critical.** We will ensure workers adhere to detailed staging and safety plans developed during the preconstruction phase in concert with the District and all Cal/OSHA requirements. Paths of travel will be clearly marked and limits of construction activity will be strictly enforced. Any utility interruptions will be coordinated well ahead of time and done after hours if at all possible. Securing the construction site from public intrusion and keeping it well-lit after hours is important.

## Shop Drawings & Submittal Reviews/Plans & Specifications Interpretation

We believe all information processing is time-sensitive during the construction process. To facilitate transparent and highly accountable communication, we utilize a web-based tracking tool that allows dashboarding of the status of all RFI processing and submittal processing. This allows our construction manager and your management team to see any issues and to move quickly to resolve them.

Our submittal activities begin weeks before the subcontractors begin the work. To ensure subcontractors fulfill the specified submittal requirements, we comb the specifications for any required submittals and enter them in to our project administration software. This enables us to work from a submittal schedule tied to individualized due dates. Once the subcontractor transmits submittals for approval, the status transitions from “scheduled” to “logged” by entering actual receipt dates to the pre-entered submittal information. We utilize our computerized submittal schedules and logs to mitigate delays due to delinquent subcontractor submittals or A/E reviews.

## Requests for Information

A key component to maintaining schedule and avoiding claims, during construction, is the prompt resolution of the contractors’ requests for information (RFIs). For this reason, we have implemented an efficient RFI processing and monitoring system through our project administration software. We will use the RFI Log to track important received/sent dates and ball-in-court status. Also, the RFI Log prioritizes when a response is required to be submitted to the contractor. This will help mitigate delays due to delinquent RFI responses. The RFI Log is updated daily and is distributed to all team members as an attachment to the weekly meeting minutes.

## Project Schedule Management

**We understand the importance of knowing your facilities will be ready for District staff members on that first day.** Because of our personal commitment to you, we will work closely with the team to ensure all schedules are met. Kitchell has a long history of delivering public sector design and construction projects on-time and within budget. Working closely with our public sector clients, as well as architects, planners and contractors, Kitchell uses proven construction management tools and techniques to meet project deadlines and budgets.

Kitchell develops and maintains project schedules, from the preliminary master schedules, to the extremely detailed one and two-week construction “look-ahead” schedules required on a complex project. Our project schedules provide information in a concise, clear and effective format for use by staff and management. We develop automated Critical Path Method (CPM) schedules, focusing initially on the design phase and including major milestones for construction. Careful monitoring and regular reporting of activities against the schedule provide early information about overall progress, especially during design. Kitchell then follows up on potential delay issues through active communication and coordination with the architect and District.

During construction, we review and monitor the progress of the contractor’s schedule against milestones, and provide recommendations necessary to avoid, minimize or recover from delays. We have developed specific language, which we have used extensively in contract documents, requiring the contractor to follow rigid specifications in the development and maintenance of a CPM schedule that is dollar and manpower loaded.

Kitchell uses the CPM schedule as the baseline upon which we measure the progress of construction. Kitchell holds weekly on-site project meetings with the contractors, and a part of the meeting focuses on the status of the schedule. We assist the contractor in updating the schedule and assist in developing a recovery schedule, if necessary. Kitchell continuously monitors the contractor’s schedule and enforces the provisions of the general contract regarding scheduled progress of the project. Whenever possible, flexibility is intentionally built into the schedule to accommodate changes without compromising the duration of the overall schedule. With frequent updates, we are able to forecast potential trouble spots in the project and proactively solve problems early.

## Change Order Mitigation

Our primary focus in mitigating construction change order costs is to prevent them from occurring in the first place. This begins with thoroughly reviewing design documents through our detailed design and constructability reviews to eliminate change orders before they happen. During construction, prompt resolution of the contractors’ RFIs help mitigate change orders. For this reason, we have implemented an efficient RFI processing and monitoring system through our project administration software. Kitchell, in conjunction with the District will develop and follow



specific procedures for resolving change order disputes. The team maintains emphasis on critical issues and ensures all appropriate team members are informed of the proposed changes and the impact on cost and time immediately when issues arise.

## Managing Change

Kitchell, along with the District and the contractor, will develop and implement specific procedures for processing change orders. The process will ensure all appropriate District personnel are immediately informed of the proposed changes and the impact on cost and time when the issue arises. The team will maintain emphasis on critical issues and their timely resolution.

The cost of approved change orders or changes proposed by the District in a “what if” situation are included in the cost control report and illustrate their effect on the project budget. This permits knowledgeable decision-making and effective cost control. The total cumulative amount of change orders will be closely monitored, and project progress and change orders will receive careful analysis to provide the District with the total financial exposure. Kitchell has also used a variety of project phasing strategies and project delivery methods, and provided detailed implementation schedules tied to proposed cash flow scenarios. Using these methods enables our clients to make informed choices on what is best for each project.

We will maintain a change order exposure log to identify changes to date and any potential future changes and their estimated cost. Change order exposure and contingency funds remaining will be reported monthly with the progress reports. Through our project administration software, change order exposure can be reported on a moment’s notice at any point during the project.

During construction we aggressively manage change orders to ensure we do not spend additional money. Throughout the project, we update the cost control report with emphasis on forecasting the final project cost and projected monthly expenditures. We take an active role in not only showing cost impacts as the project progresses, but in providing alternatives and recommendations for maintaining costs within the final budget.

## Approach to QA/QC

**Quality doesn’t just happen, it is planned.** We foster a collaborative effort between Kitchell, District stakeholders and your selected consultants that will focus on quality and value of your project. Quality control and assurance is embedded in all aspects of our service delivery—technical completeness and coordination of documents, schedule management, cost and budget management, construction administration, construction management, commissioning, activation and close-out. With this in mind, we are prepared to implement a

proactive and interactive quality management process by:

- ▶ Full time on-site construction manager to interact, observe and communicate directly with the contractor.
- ▶ Conducting pre-work meetings prior to each construction operation to ensure proper installations and applications without rework.
- ▶ We will notify the contractors, architect, inspection and the District of deficiencies and follow through to ensure corrections are made in a timely manner.

We generate informal ongoing punch lists to correct deficiencies as the project proceeds instead of waiting until project conclusion when corrections become more difficult to implement.

## Post-Construction/Close-out Phase

When the last nail has been driven, the last wall painted, and all the construction debris cleared away, your construction project is not yet complete. Successful project close-out begins in the preconstruction phase with a coordinated planning effort and is an ongoing process throughout construction. We will assist the architects and the District, community stakeholders, information technology department in defining equipment and system start-up requirements and expectations. Thorough transition planning is necessary to give you a final chance to double-check everything about the facility.

Our team’s services during this phase will include developing a plan and schedule for occupying the new facility that addresses movable equipment, furnishings, supplies and staff. After construction is complete, Kitchell can assist during the critical close-out, building commissioning and move-in stages. Kitchell will manage project turnover and will facilitate all required training, acquisition of operations and maintenance manuals, operating procedures and record documents.

## Punch List

As the project nears completion a crucial step in ensuring the project is completed successfully and in accordance with the contract documents is the punch list. At this stage Kitchell will work with the project team to facilitate this process and ensure it is completed in accordance to the procedure the team developed along with the contract documents. Kitchell will ensure all project team members complete a punch list and then will consolidate all team members’ items into one comprehensive list that will be given to the contractor to complete. Kitchell will work with the contractor and project team to ensure all items are completed and verified. Kitchell will ensure that final payment will not be issued to the contractor until all items are completed.

## Maintain On-Site Records/As-Built Documents

We use web-based project management software, as well as maintaining on-site as-built documents. Our team will post all addenda, construction change directives and approved change orders as a master set for the site. Our team will also ensure that these documents are uploaded to the ARUSD system as needed in order to ensure current project documents in the file.

## Close-out & Training Sessions

At the beginning of construction, we will prepare a close-out matrix that documents all DSA requirements, close-out documents, manuals and required training. Close-out will be clearly shown on the project schedule and as the project nears completion we will begin to discuss who should attend each training/commissioning session, and the timing of these sessions. While we conduct them, we will also film each session, so future employees will be able to access this training.

## FF&E Procurement and Installation

As a firm, Kitchell brings a specialized in-house expertise with a specific division that specializes in furniture, fixtures and equipment (FF&E) procurement, coordination and installation. This work starts early on any project and requires focus and diligence in working with all the stakeholders including end users to ensure success. Kitchell will work closely with the project team to coordinate the FF&E installation in conjunction with the project schedule. These activities may include assistance with the FF&E procurement, scheduled coordination, oversight in the field and facilitating the punchlist process for FF&E.

## Move Management

Move management is one of the most important tasks during any project and it is intensely personal due to the direct impact on end users. Our move management process is comprehensive and focused on providing complete customer satisfaction. The move management process starts in early planning of the projects and should include the following steps:

- ▶ Understanding the scope of the move
- ▶ Review of each impacted department and staff related to the move
- ▶ Understanding the nature of the department's business and operations in order to make the move as smooth as possible
- ▶ Developing a comprehensive move plan including schedule, logistics, etc.
- ▶ Communicating the move plan
- ▶ Ensuring full engagement by all the stakeholders
- ▶ Executing the move plan

## Warranty Period

Our work does not end at Certificate of Occupancy and the turnover of the building. Our team understands that the project continues well beyond the completion of construction and through the first year after construction. Our team will provide support to implement a warranty program. This program will include the following elements:

- ▶ Warranty reporting process for staff
- ▶ Owner manuals and warranty material guidance log is developed
- ▶ Forms/tools for reporting warranty issues
- ▶ Database to track warranty issues, status and resolution date
- ▶ Coordinate with prime contractor to address warranty issues
- ▶ Coordinate access on-site for prime contractor's to perform warranty work
- ▶ Participate in 10 month post-construction warranty walk

We know the key to a successful warranty period is a specific process that is communicated to end users and a single point of contact with the general contractor. Most projects will encounter warranty issues; our job is to make the process run smoothly for the District so that items are addressed quickly.



# Project Team



**ARTURO TABOADA**  
Regional Executive

**PATRICIA NGUYEN**  
Program Director

**OMAR GALVAN, CCM,**  
ASSOC. DBIA, EIT  
Project/Construction Manager,

**AMANDA CASTRUITA, EIT**  
Project/Construction Manager



## As-Needed Support Services

**HEATHER BROWN, PE, CPMP, LEED AP**  
Engineering & Architectural Services Director

**TIM PRECHEL**  
Estimating Manager

**JASON VILLANUEVA, PMP**  
Project Controls Manager

**RICK STASSI**  
Project Scheduler

**CHRIS LOVIN, AIA, LEED AP BD+C**  
Design Manager



## Arturo Taboada

### REGIONAL EXECUTIVE

Arturo has over 33 years of progressive experience in the planning, design, construction, and development of private and public buildings and programs, including more than 15 years of management experience leading teams and organizations of various scales both domestically and internationally. Arturo will be responsible for the planning and implementation of the Program and will provide strategic direction to our team. Arturo will work directly with Patricia Nguyen, Omar Galvan and Amanda Castruita to map out the strategy and implementation of the program. Furthermore, Arturo was involved. He will also be involved in leadership meetings with the ARUSD. [He is experienced with agencies including DSA, OPSC and CDE.](#)

### RELEVANT PROJECT EXPERIENCE

**Union Elementary School District, San Jose, CA:** A \$50 million project consisting of modernization and new construction of elementary and middle school sites.

**San Francisco Unified School District, 2016 Measure A Bond Program, San Francisco, CA:** A \$744 million bond program to provide repairs, maintenance and seismic upgrades to existing SFUSD facilities, as well as construct new schools.

**San Francisco Unified School District, San Francisco, CA:** A \$455 million capital outlay program for the improvement of 140 facilities. Work included planning, design and construction of ten new replacement facilities.

**Oakland Unified School District-Master Plan, Oakland, CA:** An \$800 million Long-Range Facilities Master Plan.

## Patricia Nguyen

### PROGRAM DIRECTOR

Patricia has been involved in various aspects of the construction industry for more than 18 years. She will be your day-to-day contact, coordinating our teams on our project assignments, addressing concerns and any issues identified, and leading our team of program and project/construction managers. Arturo and Patricia will lead the development and implementation of program planning, phasing, logistics, strategies for optimum resource planning and allocation, and all other facets in overseeing the program for a successful completion. Additionally, Patricia will be responsible for structuring and maintaining the Program Master Budget and Program Master Schedule. [She has experience managing the DSA project closeout process and coordinating with other local and state agencies including OPSC and CDE.](#)

### RELEVANT PROJECT EXPERIENCE

**San Francisco Unified School District, 2016 Measure A Bond Program, San Francisco, CA:** A \$744 million bond program to provide repairs, maintenance and seismic upgrades to existing SFUSD facilities, as well as construct new schools.

**San Francisco Unified School District 2011 Proposition A Bond, San Francisco, CA:** A \$500 million bond program to address the remaining projects at 50 school buildings that require modernization and upgrades.

**San Francisco Unified School District, Proposition A 2006 Bond Program, San Francisco, CA:** Project and construction management services for the 60-school Proposition A 2006 Bond Program. Kitchell was directly responsible for 10 projects totaling \$56 million.

#### EDUCATION

MBA, Business, Haas School of Business, University of California, Berkeley

MA, Architectural Studies, University of California, Berkeley

BA, Architecture & Planning, University of California, Berkeley



#### EDUCATION

BS, Architectural Engineering, California Polytechnic State University, San Luis Obispo

#### LICENSES & CERTIFICATIONS

OSHA 10-Hour





## Omar Galvan, CCM, ASSOC. DBIA, EIT

### PROJECT MANAGER

Omar is a seasoned project manager with over 11 years in the construction industry. His project portfolio includes extensive experience in K-12 education projects and programs. Omar and Amanda will serve in a lead role ensuring that we manage the architects, the overall design process, meeting project goals, budget and schedule. They will implement the project plans developed during preconstruction, and will be responsible for overall cost controls and cost management during construction. They will ensure our quality control program and the contractors' safety program are properly implemented. Omar will work closely with District staff to provide regular updates through meeting minutes, monthly reports, etc., and work closely with the program manager during preconstruction on the development of the bid packages and preparing the project plan. . [Omar is familiar working with local and state agencies including DSA, CalTrans and BSCC.](#)

#### EDUCATION

BS, Civil Engineering, California Polytechnic State University, San Luis Obispo

#### LICENSES & CERTIFICATIONS

Certified Construction Manager

Associate Design-Build Professional

Engineer-In-Training #131928

Land Surveyor-In-Training

OSHA 10-Hour

### RELEVANT PROJECT EXPERIENCE

#### **Hayward Unified School District, Measure I Bond Program, Hayward, CA:**

A \$205 million bond program encompassing 5 school sites. The program provided district-wide safety improvements, new construction and remodeling at all school sites.

#### **Newark Unified School District, Measure G Bond Program, Newark, CA:**

A \$63 million bond program which provided capital improvements at 12 of the 13 Newark Unified School District campuses.

**Berryessa Union School District, New Central Kitchen, San Jose, CA:** A new \$5 million, 8,683 SF central kitchen to handle food service operation for all of the District's 13 school sites.

## Amanda Castruita, EIT

### PROJECT MANAGER

Amanda brings nine years of experience in educational and corporate facilities. Her K-14 experience includes various DSA projects in San Jose and San Francisco. Omar and Amanda will serve in a lead role ensuring that we manage the architects, the overall design process, meeting project goals, budget and schedule. They will implement the project plans developed during preconstruction, and will be responsible for overall cost controls and cost management during construction. They will ensure our quality control program and the contractors' safety program are properly implemented. Amanda will work closely with District staff to provide regular updates through meeting minutes, monthly reports, etc., and work closely with the program manager during preconstruction on the development of the bid packages and preparing the project plan.

[Amanda is experienced with DSA and other state agencies.](#)

### RELEVANT PROJECT EXPERIENCE

#### **City College of San Francisco, Program Management Services, San Francisco, CA:**

Program and construction management services for an \$845 million bond program expected to span over seven years encompassing infrastructure, new construction and renovation projects.

#### **San Jose Evergreen Community College District, Automotive Technology Building, San Jose, CA:**

A new \$13.5 million, 39,000 SF, lease-leaseback, LEED Platinum certified facility featuring two small lecture classrooms, a medium sized classroom accommodating up to 30 students and a large lecture classroom for up to 60 students.

#### **San Jose Evergreen Community College District, Gullo Building Envelope Replacement, San Jose, CA:**

A \$3.1 million project providing an improved design for protecting the building structure and installation of improved weather barriers.



#### EDUCATION

BA, Civil & Environmental Engineering, Emphasis in Architecture, California State University, Fullerton

#### LICENSES & CERTIFICATIONS

Engineer-in-Training

OSHA 30-Hour



## Heather Brown, PE, CPMP, LEED AP

### ENGINEERING & ARCHITECTURAL SERVICES DIRECTOR

Heather brings more than 25 years of experience in the construction industry, where she has worked on a wide variety of public, higher education and commercial facilities. Heather will lead our Engineering and Architectural Services (EAS) Department in providing a variety of services. The EAS team is comprised of licensed engineers and architects who are available to provide a myriad of requested services including biddability/ constructability reviews, value engineering, facility condition assessments, commissioning, design reviews, sustainable design review and estimating sessions, as well as providing other support services as-needed throughout the course of the project. [Heather is experienced with DSA.](#)

#### EDUCATION

MBA, Finance, California State University, Sacramento

BS, Mechanical Engineering, University of Portland

#### LICENSES & CERTIFICATIONS

Mechanical Engineer #M31667, CA

Commissioning Process Management Professional

LEED Accredited Professional

#### RELEVANT PROJECT EXPERIENCE

##### **San Francisco Unified School District, Longfellow Elementary School**

**Modernization, San Francisco, CA:** A \$15.9 million, 44,340 SF modernization that included installation of seven temporary modular buildings while construction takes place.

##### **Folsom Cordova Unified School District, Oak Chan Elementary School**

**Modernization, Folsom, CA:** A \$22.6 million modernization project consisting of renovation to the multi-purpose and administration buildings, construction of four new classroom buildings and exterior work.

##### **Folsom Cordova Unified School District, Carl H. Sundahl Elementary**

**School Modernization, Folsom, CA:** A \$20.3 million modernization project which includes building and site demolition, modernization and expansion of administration and multi-purpose buildings, new construction of 42,000 SF of classroom and library/media center buildings.

## Tim Prechel

### ESTIMATING MANAGER

Tim has over 40 years of experience in all aspects of estimating for all phases of construction, including conceptual program estimates through construction documents. Tim and his team have developed estimates at all levels of a project from conceptual level estimates based on an architectural program through extremely detailed takeoffs of final construction documents. His team can also provide assistance in the evaluation of bids received leading to an award recommendation, along with the evaluation of contractor submitted requests for change orders. [He is experienced with agencies including DSA, OPSC and CDE.](#)

#### RELEVANT PROJECT EXPERIENCE

##### **Milpitas Unified School District, Measure E Bond Program, Milpitas, CA:**

A \$95 million bond program providing new construction and modernizations district-wide, including nine elementary schools, two middle schools, one high school.

##### **Cupertino Union School District, Measure A Bond Program, Cupertino, CA:**

A \$91 million project consisting of renovation, expansion and new construction of eight elementary and five junior high schools.

##### **Atascadero Unified School District, Measure I-10 & B-14 Bond Program,**

**Atascadero, CA:** A \$121.4 million bond program that provides the expansion of vocational education programs and facilities, computer and technology upgrades, and construction of a new science, technology, engineering and math facility at the high school and a new administration/classroom building at the middle school.



#### EDUCATION

AA, Civil Technology, Phoenix College



## Rick Stassi

### PROJECT SCHEDULER

Rick has over 43 years of technical and analytical industry scheduling experience, with a diverse career in the engineering and project management fields. He will provide scheduling support for your projects as-needed. Such services can range from the development of multiple, program-wide concurrent project schedules, to single project preconstruction through construction schedules, to the detailed analysis of a contractor-submitted schedule. [He is experienced with DSA.](#)

### RELEVANT PROJECT EXPERIENCE

**San Francisco Unified School District, 2016 Measure A Bond Program, San Francisco, CA:** A \$744 million bond program to provide repairs, maintenance and seismic upgrades to existing SFUSD facilities, as well as construct new schools.

**San Juan Unified School District, Dyer-Kelly Elementary School, Sacramento, CA:** A new \$49.5 million, 84,022 SF elementary school campus consisting of next generation classrooms (including flexible furniture, multiple writing walls and innovative technology), administration offices, a multipurpose room and a library.

**Atascadero Unified School District, Measure I-10 & B-14 Bond Program, Atascadero, CA:** A \$121.4 million bond program that provides the expansion of vocational education programs and facilities, computer and technology upgrades, and construction of a new science, technology, engineering and math facility at the high school and a new administration/classroom building at the middle school.

## Jason Villanueva, PMP

### PROGRAM CONTROLS MANAGER

With more than 10 years of industry experience, Jason is a dynamic leader with experience in a variety of project types including K-12 and higher education, civic/municipal and infrastructure projects. Jason will lead the program controls set up so our team can seamlessly manage the details of the program including budget, schedule, and program reports. He will also oversee the proper development of the program website, as well as set up the dashboard for Program Analytics. [He is experienced with agencies including the California Public Utilities Commission.](#)

### RELEVANT PROJECT EXPERIENCE

**San Juan Unified School District, Dyer-Kelly Elementary School, Sacramento, CA:** A new \$49.5 million, 84,022 SF elementary school campus consisting of next generation classrooms (including flexible furniture, multiple writing walls and innovative technology), administration offices, a multipurpose room and a library.

**San Juan Unified School District, Rio Americano High School Outdoor Learning, Sacramento, CA:** A \$8.3 million project consisting of renovation and reconfiguration of the existing track and athletic fields, replacement and improvement of stadium infrastructure.

**San Juan Unified School District, Bella Vista High School Outdoor Learning, Fair Oaks, CA:** A \$9.9 million project including renovation and reconfiguration of existing athletic fields, replacement and improvement of stadium infrastructure and drainage systems, infrastructure for future ADA compliant restrooms, ticket booths and concession buildings as well as providing access-compliant paths of travel.

#### EDUCATION

Coursework, Engineering,  
Sacramento City College



#### EDUCATION

MBA, Business Administration,  
Colorado Technical University

BS, Business Administration,  
Colorado Technical University

#### LICENSES & CERTIFICATIONS

Project Management Professional





## Chris Lovin, AIA, LEED AP BD+C

### PROGRAM CONTROLS MANAGER

Chris has over XX years of experience in programming, project management, master-planning, design, production and construction administration, including oversight of large and complex projects. Chris , will guide and support projects during pre-construct ion. Chris is a licensed Architect and has managed hundreds of projects during the planning, design, and preconstruction phases. Working together with our estimating and scheduling group, they will provide the Alum Rock USD with unparalleled support during the initial phases of the projects, in particular during constructability reviews and value Engineering. He is experienced with agencies including DSA, OPSC and CDE.

#### EDUCATION

B.Arch, Architecture, University of California, Berkeley

#### LICENSES & CERTIFICATIONS

Architect #39877, CA

LEED Accredited Professional,  
Building Design + Construction

### RELEVANT PROJECT EXPERIENCE

#### **Folsom Cordova Unified School District, Oak Chan Elementary School**

**Modernization, Folsom, CA:** A \$22.6 million modernization project consisting of renovation to the multi-purpose and administration buildings, construction of four new classroom buildings and exterior work.

#### **Folsom Cordova Unified School District, Carl H. Sundahl Elementary**

**School Modernization, Folsom, CA:** A \$20.3 million modernization project which includes building and site demolition, modernization and expansion of administration and multi-purpose buildings, new construction of 42,000 SF of classroom and library/media center buildings.

#### **Folsom Cordova Unified School District, Mangini Ranch Elementary**

**School, Folsom, CA:** A new \$50.9 million 66,000 SF, two-story steel-moment and brace-framed school building consisting of administrative offices, classrooms, media center, multi-purpose room, collaboration workrooms, infrastructure and maintenance facilities, playgrounds and hardcourts.





# Experience with California K-12 Districts

Below is a summary of a selection of our relevant program, project and construction management experience.

**Livermore Valley Joint Unified School District, Measure J Bond Program, Livermore, CA:** A \$245 million bond program providing classroom modernizations, repair of aging infrastructure and facility renovations throughout the District's 20 campuses. [Kitchell is providing construction management services for two of the main bond program projects at Livermore High School and Granada High School, as well as projects at East Avenue Middle School and Joe Michell K-8.](#)

**San Juan Unified School District, Project and Construction Management, Sacramento, CA:** Renovations and modernizations totaling over \$58 million. Projects include restroom replacements, outdoor learning/athletic track and field modernizations at two high schools including ticket booths and concessions, additional ticket booth, concessions and restroom renovations at three high schools as well as major renovations to accommodate class size reductions and growing campus at one elementary school site. [Kitchell is providing project and construction management services for the projects.](#)

**San Francisco Unified School District, 2016 Measure A Bond Program, San Francisco, CA:** A \$744 million bond program to provide repairs, maintenance and seismic upgrades to existing SFUSD facilities, as well as construct new schools. This is the third bond program that Kitchell has supported for SFUSD since 2008. [Kitchell is providing construction management, design management, design review and estimating services for component projects of the program.](#)

**Redwood City School District, Measure T Construction Management Services, Redwood City, CA:** A \$193 million construction program consisting of additions and renovations to 15 school programs and three support sites, in addition to other funding that the District is pursuing from the State. The program includes renovation of aging classrooms and science labs for 21st century learning and providing flexible classrooms and labs for science and other core academics, updating school libraries, classroom computers and instructional technology, fixing and replacing deteriorating rooms, removing aging and unsafe portable buildings and improving school fire and earthquake safety, replacing old, outdated and inefficient electrical, plumbing, heating and ventilation systems, and providing dedicated classrooms for music, art and performing arts electives. [Kitchell is providing construction management services for the program.](#)

**Milpitas Unified School District, Measure E Bond Program, Milpitas, CA:** \$95 million bond program providing new construction and modernizations district-wide, including nine elementary schools, two middle schools, one high school, as well as several specialized learning centers and District support service facilities. [Kitchell provided construction management support services for projects at Burnett Elementary, Randall Elementary, Spangler Elementary, Weller Elementary and Milpitas High School Pool Complex.](#)

**Fremont Union High School District, Measure B Facilities Modernization Program, Sunnyvale, CA:** A \$198 million bond program benefiting Cupertino, Fremont, Homestead, Lynbrook and Monta Vista High Schools by creating a technology fund to upgrade classroom computers and technology; building science labs; improving energy efficiency; adding solar power; building classrooms to avoid overcrowding; improving physical education and athletic facilities and replacing aging heating, lighting and electrical systems. [Kitchell provided construction management support services for Fremont Union High School District's Implementation Master Plan Project.](#)

**Cupertino Union School District, Measure H Bond Program, Sunnyvale, CA:** A \$220 million bond program for repairs, upgrades and new construction projects to the District's schools. Projects include modernizations at the District's middle schools, including a new classroom building, quad area and multi-purpose building at Cupertino Middle School. [Kitchell provided construction and project management for the program.](#)

**Berryessa Union School District, Sierramont Middle School Modernization, San Jose, CA:** A \$3.9 million, 21,000 SF modernization project which includes renovation of the Flexible Instructional Space (FIS), existing restrooms, installation of new windows and floor and new wall and ceiling finishes. [Kitchell was involved from the design phase through DSA closeout.](#) During the design phase Kitchell managed and scheduled the design meetings, estimating and provided constructability reviews. In the bid phase we conducted bidder outreach, prepared the bid documents, conducted pre-bid site walks, reviewed bids, interviewed the low bidders and provided recommendations to award for all bid packages. During the construction phase Kitchell provided full-time on-site management of the project. Kitchell conducted weekly OAC meetings and weekly meetings to keep the principal and staff up to date with the project progress.



# References

## 1. San Francisco USD

### District Size

136 schools | 57,000 students

### Type of Services

Program Management Services  
Construction Management Services

### Project Value

Multiple projects totaling over \$150 M

### Reference Contact

Maureen Anne Shelton, Director of  
Construction Management  
tel. 415.241.4316 | sheltonm@sfusd.edu

### Project Descriptions

**2016 Measure A Bond Program:** A \$744 million bond program to provide repairs, maintenance and seismic upgrades to existing SFUSD facilities, as well as construct new schools.

**2011 Proposition A Bond:** A \$500 million bond program to address the remaining projects at 50 school buildings that require modernization and upgrades.

**2006 Proposition A Bond:** Project and construction management services for the 60-school Proposition A 2006 Bond Program. Kitchell was directly responsible for 10 projects totaling \$56 million.

### Areas of Expertise

Kitchell has provided program and construction

management for three bond programs including the \$744 million 2016 Measure A Bond Program. We have worked on over 15 campuses and managed over \$150 million in school modernization projects to date.

### ARUSD Benefit

Alum Rock USD will benefit from Kitchell's experience at SFUSD managing multiple large programs and modernization projects, working on active campuses, proactive communication, and completing projects with multiple phases of construction. Projects for SFUSD have required intense coordination and communication with construction taking place in dense urban neighborhoods with limited space for parking, staging and laydown areas. Some projects have required up to eight phases in a single year to allow construction on campus while maintaining and avoiding school activities.

### District Size

17 schools | 13,900 students

### Type of Services

Program & Construction Management  
Services

### Project Values

Livermore High School Athletics: \$33 M  
Granada High School Athletics: \$8 M  
Mitchell K-8 School: \$25 M  
East Avenue Middle School: \$25 M

### Reference Contact

Kim McKneely, Bond Program Director  
tel. 925.960.2913  
kmckneely@lvjUSD.k12.ca.us

## 2. Livermore Valley Joint USD

### Project Description

A \$245 million bond program providing classroom modernizations, repair of aging infrastructure and facility renovations throughout the District's 20 campuses. Kitchell is managing two of the main bond program projects at Livermore High School and Granada High School, as well as projects at East Avenue Middle School and Joe Michell K-8.

### Areas of Expertise

Kitchell is providing program and construction management services.

### ARUSD Benefit

Alum Rock USD will benefit from Kitchell's expertise in project planning, scheduling and bid procurement

utilized at LVJUSD. One of Kitchell's first responsibilities at LVJUSD was development of RFQs for the consultants necessary to move the planned projects forward. Kitchell also met with the architects already under contract with the District to develop overall schedules for the projects.

On the Stadium improvement projects at Livermore and Granada High Schools, Kitchell broke the scope into two packages, hard-bid for the bleacher manufacturer and lease-leaseback for the site improvements. This allowed the District to get competitive pricing for the bleachers and expedite DSA approval. Utilizing LLB for the site improvements allowed the contractor to control the site and push the schedule. This process allowed construction to take place over the summer without impacting normal use of the stadium.

### District Size

16 schools | 10,318 students

### Type of Services

Construction Management Services

### Project Values

MHS Pool Complex: \$6.9 M

Spangler Modernization: \$1.2 M

Weller Modernization: \$2.2 M

Randall Modernization: \$1.8 M

Burnett Modernization: \$1.9 M

### Reference Contact

Brian Shreve, Director of Maintenance,  
Operations & Transportation  
tel. 408.640.9091 | bshreve@musd.org

## 3. Milpitas USD

### Project Description

A \$245 million bond program providing classroom modernizations, repair of aging infrastructure and facility renovations throughout the District's 20 campuses. Kitchell is managing two of the main bond program projects at Livermore High School and Granada High School, as well as projects at East Avenue Middle School and Joe Michell K-8.

### Areas of Expertise

Kitchell provided construction management services, as well as management of the District's Project Stabilization Program, project management and closeout.

### ARUSD Benefit

The District will benefit from Kitchell's expertise in value engineering and community outreach provided on the Milpitas USD Measure E program. During the design phase of projects, Kitchell provided estimating, value engineering and alternate building systems. Kitchell also provided extensive community outreach for projects within the program. For the Milpitas High School Pool Complex, Kitchell conducted a community meeting with neighbors directly across the street from the work site to advise them of construction activities, project schedule and impacts to traffic.

### District Size

14 schools | 7,500 students

### Type of Services

Construction Management Services

### Project Values

Adelante Modernization: \$1.3 M

McKinley Modernization: \$3.5 M

Orion Modernization: \$1.3 M

Northstar Modernization: \$900,000

## 4. Redwood City School District

### Project Description

A \$193 million construction program consisting of additions and renovations to 15 school programs and three support sites.

### Areas of Expertise

Kitchell is providing full construction management services.

### Reference Contact

Donald Dias, Director of Facilities | tel. 650.482.2238 | ddias@rcsdk8.net

### ARUSD Benefit

Alum Rock USD will benefit from Kitchell's expertise in project phasing utilized at RCSD to coordinate the contractor's effort to work on campus while school is in session. Kitchell developed a comprehensive phasing plan and holds weekly meetings with the contractor and school administrators to coordinate the construction schedule to avoid impacts.

### District Size

13 schools | 7,200 students

### Type of Services

Construction Management Services

### Project Value

\$3.7 million

### Reference Contact

Tony Kanastab, Director of Bond  
Facilities and Modernization  
tel. 408.923.1873 | tkanastab@busd.net

## 5. Berryessa USD

### Project Description

A \$3.7 million, 21,000 SF modernization project which includes renovation of the Flexible Instructional Space (FIS), existing restrooms, installation of new windows and floor and new wall and ceiling finishes.

### Areas of Expertise

Kitchell provided full construction management services from the design phase through DSA closeout.

### ARUSD Benefit

The District will benefit from Kitchell's expertise in scheduling and managing multiple contractors. The project was delivered via multiple prime and involved four contractors. To ensure all scopes of work were covered and manage the project schedule, Kitchell produced a master CPM schedule to manage all trades, vendors and consultants and scheduled preconstruction meetings to get buy in from all parties on the schedule.





# Proposed Methodologies & Capabilities

## Program/Project Scheduling

Kitchell's project team is well versed in the process of overall program scheduling, as well as highly detailed critical path method (CPM) construction scheduling. At or near the completion of design, we assess the detailed scope of work and determine appropriate construction sequencing and reasonable milestones. We convey the critical sequencing and milestones to contractors in the contract documents.

We will make recommendations regarding the division of work in order to facilitate the bidding and award of contracts, allowing for phased construction if appropriate. We will advise the project team of factors including long-lead materials procurement, changing material prices, weather, overall schedule requirements, favorable/unfavorable bidder climate and regulatory requirements.

During construction, potential project issues are tracked with pending costs to allow accurate projections of the final budget and monthly reporting is provided proactively to you showing contract amount, issued and pending change orders, and remaining construction contingency amount. This includes monitoring any and all costs associated with selected contractors.

## Meeting Established Budget

Kitchell has a long history of delivering projects on time and on budget. Some of the key elements in our cost control process include our estimating skills, design reviews, structured value engineering, use of a cost control report, effective change order evaluation and evaluation of trade contractor pay requests. Through our experience and the change order exposure log, we have the ability to "look ahead" to reduce the unknown factors that can create budget exceeding cost issues.

We will update the cost control report throughout the project, with emphasis on forecasting the projected final project cost and projected monthly expenditures. We take an active role in not only showing cost impacts as the project progresses but in providing alternatives and recommendations for maintaining costs within the budget.

## Estimating

We have established a system to benchmark construction costs to track building systems and costs in today's dollars. We will develop our estimates for each trade package to provide you with comprehensive

information from which critical business decisions can be made. We will perform a detailed quantity take-off estimate of the design development documents to verify the project scope is within budget. As the design progresses, we will update and refine the estimate at key submittal stages throughout construction documents. Through this process, we will advise the District and architect if it appears the project construction budget will not be met and make recommendations for corrective action. Estimate reduction strategies can include scope reduction, bid alternates and further value analysis.

## Document Control

Our team understands the importance of maintaining the organization and quality of all project documentation during all phases of the project. Understanding the benefits of what innovative technologies bring to construction projects, Kitchell continually evaluates and integrates the latest technology available. A sustained practice has enabled us to gain better results through innovation.

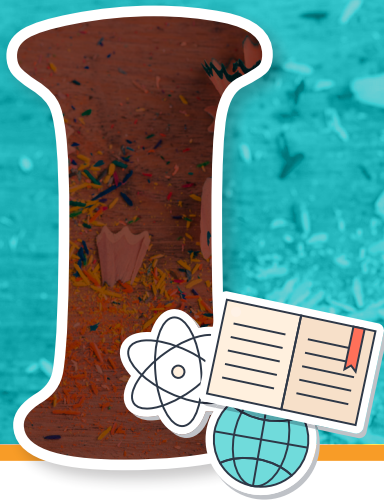
We understand the importance of controlling documents and data in ways that complement the District's internal systems and will ensure all of Kitchell's internal document management processes are compatible with those systems. Kitchell's use of these technologies to better manage information will provide the project team with real-time data enabling well informed decision-making abilities.

## Public Information Websites

Kitchell embraces the use of project-specific websites and social media to promote and more effectively communicate project details to the community. These websites contain project-specific information about important dates, deadlines and milestones, progress and safety updates, and can also provide live, on-site video cameras so any visitor can witness construction happening in real-time. Site information is updated regularly and the URL is distributed widely to the surrounding community. Districts can rely on Kitchell's project websites to provide a centralized location to direct parents, students, staff and local community members when questions regarding projects arise.

## Example Reports

Example reports for scheduling, budgeting, cost estimating, document control and public information websites are provided in the appendix.



# Legal Issues

**Is there currently any legal action pending against your firm or an affiliated firm by another public agency related to services, or lack thereof, provided by your firm or the affiliated firm? (An “affiliated firm” means a firm owned or controlled by you.)**

No, Kitchell has no pending legal action against our firm by any public agency.

**Has your firm entered into any settlements or had judgments against it any time within the last ten (10) years? Please describe each such settlement or judgment, including the nature of the action and the amount of recovery/judgment?**

- ▶ **Allan Hancock JCCD (Date of Claim: June 2014):** Arbitration involving general contractor seeking additional money from a public owner that involves counterclaims of construction delay and design errors. The AHJCCD has asserted a claim against Kitchell and the design team for indemnification.
  - **Status of the claim:** Resolved - it was determined that Kitchell had no responsibility.
- ▶ **Yosemite Community College District Math Science Building (Date of Claim: Jan. 2014):** The contractor filed a claim against the District and Kitchell for Construction Defects.
  - **Status of the claim:** Resolved - it was determined that Kitchell had no responsibility.
- ▶ **San Joaquin Delta CCD Math Science Building (date of claim: June 2013):** The contractor filed a claim against the District, Kitchell and the Architect for Construction Defects.
  - **Status of the claim:** Resolved - it was determined that Kitchell had no responsibility.

**Within the past ten (10) years, has your firm ever had a services contract terminated by a California public agency? If yes, please identify the name of the public agency and the reason for the termination.**

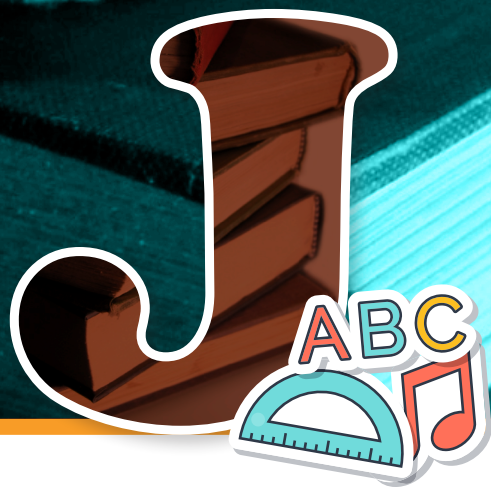
No, Kitchell has never had a professional engineering services contract terminated by a California public agency.

**Has your firm or any affiliated firm ever been sued by any public agency for fraud or false claims? If yes, please identify each action including the names of all parties, the venue/location of each action, the date the action was filed, and the outcome of each such lawsuit. (An “affiliated firm” means a firm owned or controlled by you.)**

No, Kitchell has never been sued by a public agency for fraud or making false claims..

**Has your firm ever filed for bankruptcy protection or been declared insolvent by any court, or had a receiver appointed to manage the assets of the firm? If so, please describe all such instances.**

No, Kitchell has never filed for bankruptcy protection or had a receiver appointed to manage the assets of the firm.



# Fees

## Compensation for Services

Kitchell's philosophy for determining our compensation for services is driven by matching value to cost. In other words, we strive to provide the most appropriate complement of services and delivery methods to meet your objectives. Our primary goal is to align our understanding of the project success factors with your expectations.

Typically, we prefer to be compensated on a lump sum fixed fee basis derived by using the approach just described. We do not make it a practice to request changes to our contract for minor scope changes, which can be managed within our established staffing plan and schedule.

Our compensation is dependent on many factors that can include project construction value, schedule constraints and durations, phasing, level of bid packaging, subcontractor sophistication and level of services. For this assignment, we propose a two-phase compensation structure based on hourly rates and subsequently an option for the district for a) hourly rates or b) as a lump-sum fee.

**Phase 1** entails the support of a staff to provide services on a daily basis (8 hours/day, 5 days/week) to review & analyze existing documents including budgets and schedules, develop an implementation plan including a revised budget and master schedule. This four to five-month effort yields a potential cost to the owner as described below.

Start Up Phase	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Total StaffMos	Hourly Rate	Monthly Rate	Total
Project Executive, Arturo Taboada	0.2	0.2	0.1	0.1	0.1	0.70	\$250.00	\$40,000	\$28,000
Program Manager, Patricia Nguyen	0.4	0.4	0.4	0.4	0.2	1.80	\$225.00	\$36,000	\$64,800
Project/Construction Manager, Omar Galvan	1.0	1.0	1.0	1.0	1.0	5.00	\$185.00	\$29,600	\$148,000
Project/Construction Manager, Amanda Castruita	0.6	0.6	0.6	0.6	1.0	3.40	\$185.00	\$29,600	\$100,640
Estimator	0.6	0.6	0.6	0.4	0.4	2.60	\$175.00	\$28,000	\$72,800
Scheduler	0.2	0.2	0.2	0.2	0.4	1.20	\$175.00	\$28,000	\$33,600
Arch/Engineering Specialist	0.2	0.4	0.2	0.4	0.2	1.40	\$175.00	\$28,000	\$39,200
Program Controls/Analytics	0.2	0.4	0.4	0.4	0.2	1.60	\$175.00	\$28,000	\$44,800
<b>Total</b>									<b>\$487,040</b>



If there is actual construction management work to be performed within the Phase 1 period and we need to add staff, we would provide additional staff at the hourly rated listed in the table below.

**Phase 2** entails the support of a staff to provide services on a daily basis (8 hours/day, 5 days/week) to provide continuous program and construction management services as described in our proposal. However, this effort would be priced based the plan developed during Phase 1. As a matter of reference, we have provided indicative ROM percentage fees per phase.

Service	From	To	Notes
Program Management	1.75%	3.25%	Depending on scope, staffing and duration
Construction Management	6.00%	12.00%	Depending on scope, staffing, duration and delivery method

The hourly rates listed below are fully burdened with employee benefits, statutory requirements, overhead and profit and exclude associated material expenses. These rates are applicable to services requested on an individualized hourly/daily billing basis.

Position	Hourly Rate
Project Executive	\$250.00
Program Manager	\$225.00
Sr. Project/Construction Manager	\$200.00
Project/Construction Manager II	\$185.00
Project/Construction Manager I	\$175.00
Sr. Project Engineer	\$145.00
Project Engineer II	\$135.00
Project Engineer I	\$125.00
Estimator	\$175.00
Scheduler	\$175.00
Arch/Engineering Specialist	\$175.00
Program Controls/Analytics	\$175.00
Administrative Support	\$85.00

#### Hourly Rates Include:

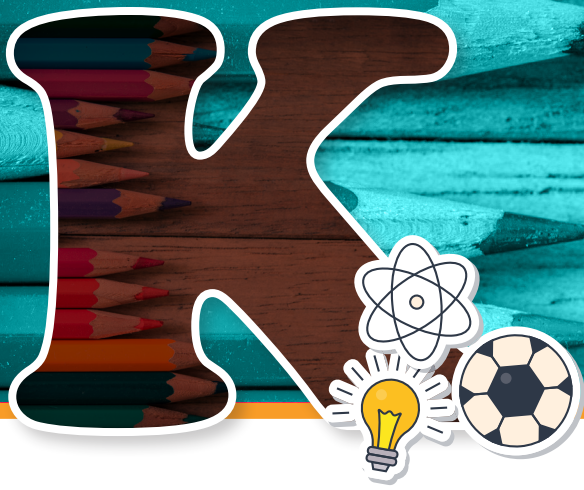
- ▶ Employee Salary
- ▶ Employee Benefits
- ▶ Employee phone and computer
- ▶ Company's Overhead & Profit

## Reimbursable Expenses

Reimbursable expenses are billed at actual cost plus 10% markup. Reimbursable costs vary from project to project. Following are categories of possible reimbursable expenses.

- ▶ Office space
- ▶ Office set up and utilities
- ▶ Internet and software
- ▶ Postal and delivery services
- ▶ LED screens and, or, TV screens
- ▶ Office equipment
- ▶ Document reproduction
- ▶ Communications
- ▶ Plans, prints, photographs
- ▶ Travel outside the area
- ▶ Any other cost not included in the rate

The hourly rates will be effective through December 2020 and are subject to a COLA adjustment (3.0%) for subsequent years.



# Other

## Engineering & Architectural Services

Unique to Kitchell is our in-house Engineering and Architectural Service (EAS) division of more than 40 licensed engineers and registered architects. Our EAS department provides biddability/ constructability reviews, value engineering and estimating sessions, and other support services as needed throughout the course of the project.

### Design/Constructability Reviews

Our team of licensed engineers and architects can provide a complete review of the design documents. On average our EAS Department's effective design reviews have reduced changed orders to approximately 2% of construction costs. To ensure the scope requirements are fulfilled and field change orders are minimized, Kitchell's EAS Department, in conjunction with the project site team, will provide our "second set of eyes" peer review for appropriateness, coordination and constructability concerns.

The design documents will be reviewed to ensure conformance with the District's expectations and for code compliance, quality, constructability, efficiency and cost-effectiveness. Our reviewers will crosscheck the construction documents considering requirements of trade contracting and developed scope packages. Our constructability reviews will be performed in online Bluebeam sessions. Design team and other stakeholders will have 24/7 access to the review comments and can make the corrections and reconciliations as review is being completed. This allows for a more cost effective process and less burden on review time. Implementing this process will ensure the trade contractors bid on well-planned contract documents.

### BIM

Kitchell utilizes Building Information Modeling (BIM) tools to coordinate construction documents both in preconstruction and construction.

Through BIM the structural, mechanical, electrical and plumbing designs are integrally woven together and coordinated from design through construction. During preconstruction, we use Navisworks to identify clashes in between the different disciplines so they can be resolved by the design team prior to bid documents. These tools can prove to be extremely useful in complex projects such as this.

We use BIM to manage multi-discipline information in order to facilitate practical solutions for the project's design and construction challenges. **BIM has become a major factor in not only managing 3D systems coordination but has also become integral in all facets of construction including the following:**

- ▶ Building virtual 3D models from 2D design drawings or finishing 3D models that the design team has provided
- ▶ Utilizing SketchUp, AutoCAD, Revit Architecture, Revit Structure, Revit MEP, Navisworks and Synchro to create and maintain our models
- ▶ Hosting a secure portal with built in controls for model coordination which includes access for the owner, designer and contractors
- ▶ Attaching schedules to the model to verify correct sequence/activities
- ▶ Utilizing the models to extract quantities for estimates
- ▶ Creating a "living model" with operating and maintenance manuals that facility staff can use to manage building systems.

## Facilities Management

Kitchell provides facility management, planning, design, project management, testing, commissioning, property development/ management and assessment services. We are knowledgeable in every aspect of a facility's design, construction and maintenance — especially regarding the safe operation of equipment in government and corporate campus buildings. We understand how to properly maintain and operate facilities to extend building life and manage the total cost of ownership. We provide in-house preventative maintenance services built around the systems specific to each facility. Our depth of experience includes a working knowledge of virtually all aspects of the systems in your facilities.

# Appendix

## Project Samples



### San Juan Unified School District Design Build Schedule Review Cover Sheet

### Project Scheduling Report

Project Name Dyer-Kelly Elementary New Construction	
Project Address 2236 Edison Avenue, Sacramento, CA. 95821	
Project Number	Construction Mgr./Company
Contract #708812	
Contract #708812	

#### Project Milestone Dates

	BL Start	Actual	BL Finish	Actual	Action
INC 1 NTP	04-02-18	04-10-18			ORR
INC 2 NTP	08-06-18	08-29-18			NCN
Final Completion	10-31-19	11-04-19			NCN

#### Schedule Review Comment Summary

*\*Reference attached report for full comments, numbered summary below.*

Item #	Description	Action	SJUSD Sign Off
1	Inc 2 NTP Delayed 23 days	NCN	
1	Inc 2 NTP Delayed 23 days	NCN	
2	Overall Project Completion delayed by 4 days	NCN	
3	Contractor performing at 104% optimal performance.	CC	
4	Many changes to activities and relationships resulting in a	NCN	
5	Technical Issues	CC	
6	Bldg Substantial Completion 2 days before school start	ORR	

#### Schedule Review Comment Key

CC	Contractor Coordination – No Action	ORC	Owner requested change
NCN	Non-Compliance – Correct now	ORR	No action - Owner retains rights to correct
NCD	Non-Compliance – Correct by next review	AIR	Additional Information - Resubmit

#### Review Status

Review Status: Accept with Condition Prepared by: J. Frahm Date: 1/16/2019  
 Authorized By: \_\_\_\_\_ Date: 1/16/2019



**Date:** 16 January 2019

**To:** Dan Porter  
Kitchell CEM, Inc., Project Manager

**From:** Jennifer Frahm, LEED AP  
Kitchell CEM, Inc., Project Scheduler

**Regarding:** 6355 SJUSD: Dyer-Kelly Elementary School – December 2018 Schedule Update

## Purpose of Memo

Kitchell CEM, Inc. ("Kitchell") was directed to prepare a technical analysis of the update schedule submission for the San Juan Unified School District Dyer-Kelly Elementary School project. The native schedule file is titled "P6 Master Schedule Dyer Kelly Update 12-28-18.xer", received by Kitchell scheduling staff on 08 January 2019. This memo reviews and communicates the schedule's general compliance with the Contract documents, in particular XIII. Article 13. Time of Work, and also outlines important observations and findings that may impede the update schedule's ability to be used as an effective project management tool.

## Executive Summary

### Introduction

This review is for the December 2018 Update Schedule. The Contract Start Date, per the Notice to Proceed (NTP), is 13 June 2017. The original required final completion date of 31 August 2019 was amended with GMP Amendment 3, which extends the completion of demolition and sports field work to 31 October 2019. The data date is 28 December 2018.

### Milestone Overview

The table below shows schedule's milestone per the 'Notice to Proceed with Design' Letter dated June 14, 2017. Additional milestones created by Amendment 3 are also included.

Milestone Description	Activity ID	Contract Requirement	Current Schedule	Variance from Contract
NTP Construction (Inc. 1)	10	02-Apr-18	10-Apr-18A	(8)
NTP Construction (Inc. 2)	495	06-Aug-18	29-Aug-18A	(23)
Project Completion Building M	9210	14-Aug-19*	12-Aug-19	2
Overall Completion	9220	31-October-19	04-Nov-19	(4)

\*School starts 15 August 2019

The Baseline Schedule shows the project reaching overall completion 4 days after the contractually-required date of 31 October 2019. It shows reaching substantial completion of the building portion of the work 2 days before it is required to be complete. The start of school on 15 August 2019, so in the above table it is assumed construction must, therefore, be complete by 14 August 2019. Contractor was requested to include a milestone for Start of School 2019 in the September, October and November schedule update reviews. It does not appear that has happened. The Contractor is again requested to include a milestone for Start of School 2019 and link it to substantial completion of Building M.

### Project Performance

The tables below are a snapshot of current project performance using earned value and earned schedule. Payment applications are current through 31 December 2018. For purposes of the below metrics, progress through 31 December 2018 is used.

Budget	Original Contract	Change Orders	Current Contract	Completed Work	Remaining Work	Percent Budget Complete
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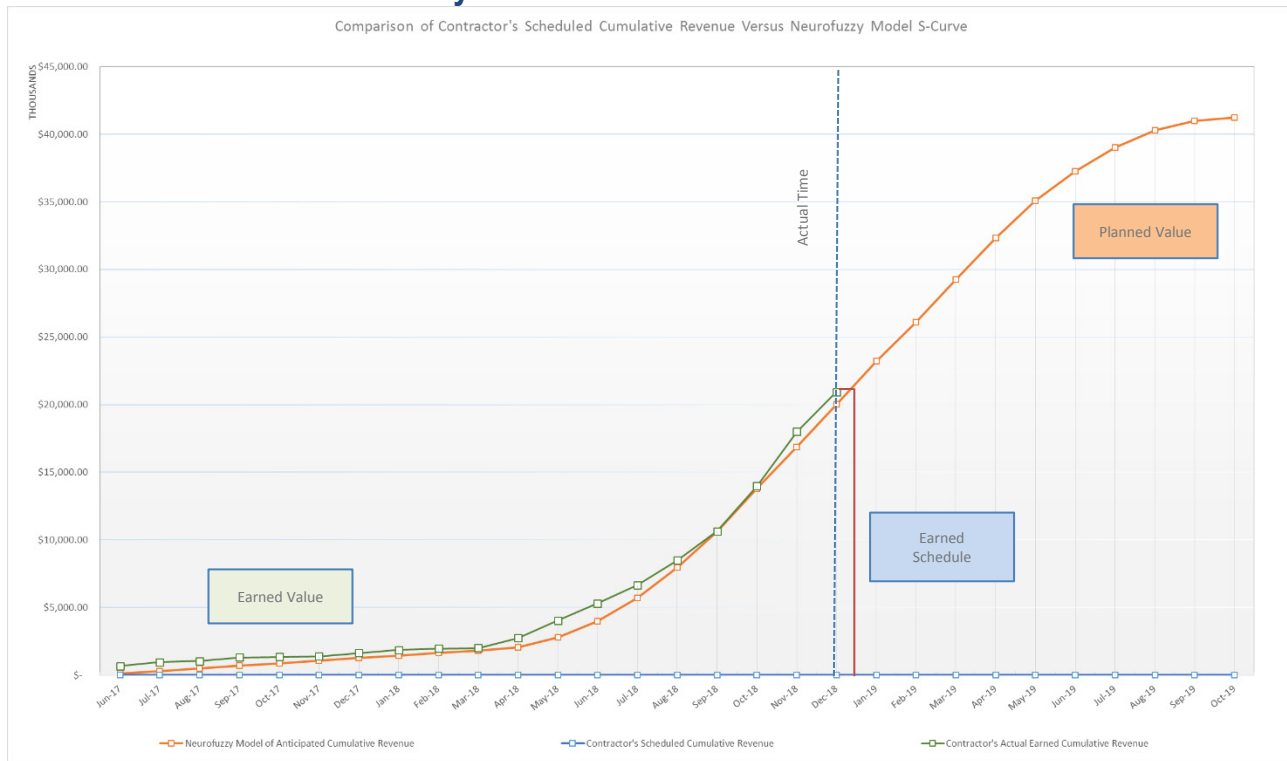
Budgeted Cost	\$41,242,135	\$0.00	\$41,242,135	\$20,941,126.07	\$20,301,008.93	51%
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Schedule Performance Index	A - Current Earned Value	B - Current Planned Value	SPI = A/B
SPI	\$20,941,126.07	\$20,042,728.30	1.04

Earned Schedule	Current Data Date	Earned Schedule Date	Schedule Variance (days)
ES	31-Dec-2018	08-Jan-2019	8

The Schedule Performance Index (SPI) indicates the ratio of worked performed to work planned. In this case, the contractor has earned 104% of the project work plan at this time. This number is further exemplified by the earned schedule date which shows the point in time where the project has earned from a performance perspective. It is helpful when knowing these key project health indicators to look further into schedule details that reflect delay.

## Cost Curve Overview and Analysis



The above graph illustrates the work planned and the work performed. From calculation and also by graphical estimation, the earned schedule will be determined as the project progresses. The planned value is determined using an independent algorithm for creating an S-curve. The earned value will be the Contractor payment applications and when appropriate, accrued costs in the event a payment application is not available.

## Completion Forecast

### Forecast Scenarios

NTP	ES	AT	SPI (t)	PD	ED	TSPI (t)	Forecast Finish	Increase Efficiency	Days Turn-around
6/13/2017	575	566	1.02	870	870	0.97	10/31/2019	-	-
6/13/2017	575	566	1.02	870	874	0.96	11/4/2019	-	-

## Comment

In order for the Contractor to complete the project on the contractually-required date, it must maintain its current efficiency.

## Longest Path to Completion Overview & Analysis

### Critical Path

As was stated in the previous four schedule reviews, the multiple “mandatory starts” and “start on or before” constraints should be removed, as they prevent the project’s critical path to be calculated and shown. Additionally the “Overall Project Complete” activity should have a “finish on or before” constraint of 31 October 2019.

**Contractor is requested to make required adjustments in the next schedule update and verify the longest critical path is shown and correct. Should the Contractor have previously made the adjustment to include the recommended Project Complete constraint and it is just not appearing in P6, we request notification.**

Once all constraints were removed, and the Project Complete constraint (recommended above) was added, the following Longest Path to Completion is shown. It is very similar to the November 2018 update.

The critical path begins with Cement siding, followed by CS DID and South Elevation K area complete. Connect downspouts and RD is next, followed by CS exterior did area “K.”

The critical path continues with fine grade south of MD line, site lighting, irrigation sleeves, site lighting, form curbs/gutters and sidewalks. Base rock is next, and then rebar placement, pouring of sidewalks, form footing in Area K playground, and cure footings. Setting the playground equipment is next, install shade structure, place rubber surfacing, first paving move-in, planting, slurry seal and stripe, signage, CS DID and area complete early site increment 2.

Move out of old school is next on the critical path, followed by School Out 2019, kindergarten/admin. Yellow (2 activities), library/MP Pink, and N. Classroom Wing Orange. Rough grade site occurs next and is followed by the balance of underground utilities, site lighting, fine grade site for concrete, form, pour and cure concrete, pave, slurry seal and stripe, signage, CS DID and area complete.

The critical path completes with punch walk, punch work, substantial completion of balance of sitework increment 2, closeout documentation, and overall project complete.

Please note that the start of school 2019 and/or the completion of the buildings does not appear on the critical path.

## Contract Compliance and Technical Analysis

### Review Comments and Observations:

The following are technical issues that should be reviewed and possibly revised. See attached Update Checker and Logic Analysis for more detailed information.

1. Deleted Activities:
  - a. 9 planned activities have been deleted
2. Added Activities:
  - a. 6 as-built activities have been added.
  - b. 144 planned activities have been added.
3. Deleted Relationships:
  - a. 10 relationships were deleted (activities still exist).
  - b. 11 relationships were deleted with deleted activities.
4. Added Relationships:
  - a. 8 relationships were added (activities existed).
  - b. 163 relationships were added with added activities.

6 relationships were modified. 2 relationship lags were modified.
5. 2 active activities do not have a finish relationship.



6. 16 constraints were deleted. 5 constraints were modified.
7. 29 activities had their original durations modified.
8. 1 activity had its descriptions changed.
9. 1251 activities have a change in float greater than the time in the update period.
10. 5 activities have actual dates earlier than the target date (05 December 2018).
11. 27 activities have actual dates on the update data date (28 December 2018).
12. 3 activities have modified start dates.
13. 11 active activities are zero percent complete, and also show no progress this period.
14. 6 activities have diminishing progress this period.
15. 39 activities could have started this period but did not. 18 activities could have finished this period but did not.
16. 63 completed activities finished later than expected.
17. 113 milestone activities show a variance.
18. There remains 1 FS activity with a negative lag, otherwise known as a "lead." Scheduling best practices discourage use of this relationship.
19. There are 5 out of sequence links and one reverse logic link.
20. There are 24 activities riding the data date, meaning nothing is preventing these activities from beginning.

## Conclusion

The findings in this review show:

1. The milestone variance is (4) days resulting in a late overall project completion. Substantial completion of Building M is 2 days ahead of schedule.
2. The Contractor is performing at 104% of optimal performance (measured using Earned Value methodology).
3. The Contractor's performance results in an earned date of 08 January 2019 (measured using Earned Schedule methodology).
4. There continue to be technical revisions demonstrating contractual non-compliance and possible schedule inaccuracies.
5. Any delay claims by the Contractor need to be submitted as outlined in the Contract Documents, separate from the Monthly Schedule Updates.
6. **Contract to respond regarding changes on schedule. This was also requested on the previous schedule update review, however no response was received.**

## Disclaimer

The findings, observations, and/or opinions expressed in this review are not intended to direct the Contractor to revise its intended methodology or act as written authorization to amend any part of any of the Contract documents. Any questions or comments regarding this schedule review can be directed to Kitchell's project manager. Additionally, the review and rejection or non-rejection of any schedule, or any part of a schedule shall not be construed as a complete review and analysis of the submitted schedule(s). The acceptance of a schedule or not rejecting any part of it does not relieve the Contractor from any requirements in the Contract, nor is the acceptance an authorization to change any terms or conditions of the underlying Contract Specifications without the District's written authorization. The Contractor is respectfully reminded that failure of the Contractor to include any element of the Work within the schedule or any inaccuracy in the schedule will not relieve responsibility for accomplishing the Work in accordance with the Contract documents and within the Contract time. The Contractor is solely responsible for ensuring that all subcontractors and suppliers comply with the requirements of the Contract schedule for their portions of the Work, and that all schedules submitted to the District have been developed after coordination with subcontractors and suppliers. If the Contractor believes they are entitled to a Contract time extension, they are respectfully reminded that they are obligated to prepare and submit a time extension request that is consistent with Contract requirements in order to maintain and established entitlement. Failure to provide the necessary items and documentation may result in the automatic waiver by the Contractor for an extension and may also result in the Contractor in having to recovery or mitigate any loss time at its own cost.

## Attachments

- |                               |                                |
|-------------------------------|--------------------------------|
| 1. All Work Activities        | 4. Work Planned Next Period    |
| 2. Longest Path to Completion | 5. Activities Riding Data Date |
| 3. Work Performed This Period | 6. Forensic Analysis Report    |
|                               | 7. Logic Analysis Report       |
|                               | 8. Update Checker Report       |



# San Juan Unified School District

## Project Scope Statement

# Project Budgeting Report

### Scope Sheet

Project Name	
Del Campo High School Integrated Learning Building	
Project Address	
4925 Dewey Drive, Fair Oaks, CA 95628	
Project Number	Const. Mgr./Company
207-9512-N1	Dan Porter/KCEM

### Estimated Project Dates

*\*Estimated only, subject to change based project needs (mm/dd/yy)*

	START	END		START	END
Planning	<u>4/13/2018</u>	<u>6/1/2018</u>	Bid	<u>6/4/2018</u>	<u>8/31/2018</u>
Design	<u>9/3/2018</u>	<u>9/27/2019</u>	Construction	<u>10/7/2019</u>	<u>1/29/2021</u>
Approval	<u></u>	<u></u>	Closeout	<u>2/1/2021</u>	<u>3/26/2021</u>

### Project Description

The project consists of design and construction of a new classroom with science, art and career technical education learning and collaborative spaces, modernization of relocated existing learning spaces, site development to include new staff parking, improvements to existing paths of travel and existing building components to bring into compliance with DSA, and underground utility improvements and upgrades as needed.



# San Juan Unified School District

## Project Scope Statement Funding sheet

Project Name

Del Campo High School Integrated Learning Building

Project Number

207-9512-N1

Const. Mgr./Company

Dan Porter/KCEM

**Funding:** *If in CW use the cost to complete to fill in Original funding and CW funding.*

Category/Bond	Original Funding (ORG BGT)	Cware Funding (CUR BGT)	Changes Funding to?	Notes
New Construction	4,297,700.00	26,479,432.00	30,777,132.00	
<b>REQ'D FUNDING</b>	4,297,700.00	26,479,432.00	30,777,132.00	In Balance

*"In Balance" will appear when Current Change Funding Amount equals Current Changed Budget from Budget Worksheet*

**Fiscal Year Cash Flow - This is by Fiscal Year and by Quarter.**

Fiscal Year	QTR 1 July, Aug, Sept	QTR 2 Oct, Nov, Dec	QTR 3 Jan, Feb, March	QTR 4 April, May, June	Fiscal YR Total	NOTES
2017/2018				101,844.12	101,844.12	
2018/2019	125,443.00	108,214.00	231,558.88	665,398.99	1,130,614.87	
2019/2020	593,335.98	2,503,426.47	4,167,835.98	7,849,118.89	15,113,717.32	
2020/2021	4,287,283.77	4,211,881.75	3,350,204.54	2,567,159.95	14,416,530.01	
2021/2022	14,425.68				14,425.68	

**REQ'D CASH FLOW**

30,777,132.00

In Balance

*"In Balance" will appear when Req'd Cash Flow equals Req'd cash flow from Budget Worksheet.*

### Approvals

Dan Porter

Print Name: Project Manager

  
Signature: Project Manager

10/30/18

Date

Laura Leet

Print Name: Facilities Construction Manager

Signature: Facilities Construction Manager

Date

Brett Mitchell

Print Name: Director Facilities Construction & MOD

Signature: Director Facilities Construction & MOD

Date

Frank Camarda

Print Name: Senior Director Facilities M&O & Transportation

Signature: Senior Director of Facilities M&O & Transportation

Date

Cherie Chenoweth

Print Name: Facilities Accounting Supervisor

Signature: Facilities Accounting Supervisor

Date

### Facilities Accounting Office Use Only

Cash Flow	
GASB	

CW Funding	
CW Project	
CW Budget	

QSS/QCC	
PSS Email	

3.87% Project Manage Percentage  
0.05864814 DB Design Percentage  
0.70% Architect Percentage  
1.22% Inspector Percentage  
86.21% Hard Cost  
13.79% Soft Cost

6200	25,791,849.00	3302	
5800	7,583.00	3312	
5600	-	3502	
4320	730,000.00	3602	
2950/3xxx	10,000.00	3702	
		3962	

10/30/2018







# San Juan Unified School District

## Project Scope Statement Budget Sheet

Project Name

Del Campo High School Integrated Learning Building

Project Number  
207-9512-N1

Const. Mgr./Company  
Dan Porter/KCEM

**Budget Type:** *If in CW use the cost to complete to fill in Original budget and CW budget.*

Type	Date	2nd Date Change	Notes
Preliminary Design Budget	4/10/2018		Planning, Project Support and Permitting/Agency fees based on a \$30M project
Original Budget	10/26/2018		Pre RFP Budget
Project Revision			
Project Revision			
Project Complete			

**Budget Worksheet:** *Do not change anything in the shaded areas*

Code	Budget Item	Original Budget ORG BGT	Cware Budget CUR BGT	Change Budget To?	Difference Change-Cware	Notes
<b>10</b>	<b>Planning &amp; Coordination</b>					
11	Project Management	950,700.00	950,700.00	950,700.00	-	CM Services
12	Architect			172,108.00	172,108.00	
13	D.B. Service Contract	2,250,000.00	2,250,000.00	1,440,725.00	(809,275.00)	Design Services for DB Entity + DLR
14	Specialty Studies	-	-	8,000.00	8,000.00	
14.1	Geotechnical				-	
14.2	Survey			8,000.00	8,000.00	
15	Engineer				-	Civil, Electrical, Low Voltage, Mechanical, Structural
16	CEQA/LEGAL	60,000.00	60,000.00	60,000.00	-	
19	Other				-	
<b>10</b>	<b>Planning &amp; Coordination Total</b>	<b>3,260,700.00</b>	<b>3,260,700.00</b>	<b>2,631,533.00</b>	<b>(629,167.00)</b>	
<b>20</b>	<b>Project Support</b>					
21	Inspection	250,000.00	250,000.00	300,000.00	50,000.00	
22	Underground Detection			69,750.00	69,750.00	
23	Hazard Management Consultant	65,000.00	65,000.00	65,000.00	-	
24	Construction Testing			175,000.00	175,000.00	
28	Printing/Advertisement	5,000.00	5,000.00	20,000.00	15,000.00	
29	Other	12,000.00	12,000.00	12,000.00	-	
<b>20</b>	<b>Project Support Total</b>	<b>332,000.00</b>	<b>332,000.00</b>	<b>641,750.00</b>	<b>309,750.00</b>	
<b>30</b>	<b>Permit &amp; Agency Fees</b>					
31	DSA Plan Check fees	400,000.00	400,000.00	400,000.00	-	
32	CDE Plan Check fees	25,000.00	25,000.00	25,000.00	-	
33	County/City/Utility Fees	220,000.00	220,000.00	427,000.00	207,000.00	
33.1	SMUD	140,000.00	140,000.00	140,000.00	-	
33.2	P G & E	10,000.00	10,000.00	12,000.00	2,000.00	
33.3	Water District	10,000.00	10,000.00	195,000.00	185,000.00	
33.4	Fire Marshall	10,000.00	10,000.00	10,000.00	-	
33.5	Sacramento County	40,000.00	40,000.00	60,000.00	20,000.00	
33.6	Fiber/Data Service	10,000.00	10,000.00	10,000.00	-	ATT, Surewest, Comcast
39	Other	60,000.00		50,000.00	50,000.00	
<b>30</b>	<b>Permit &amp; Agency Fees Total</b>	<b>705,000.00</b>	<b>645,000.00</b>	<b>902,000.00</b>	<b>257,000.00</b>	
<b>40</b>	<b>Construction Support</b>					
43	Trailer Rent/Leasing				-	
44	Temp Fencing Leasing				-	
47	Moving			70,000.00	70,000.00	Bins, Movers, etc..
<b>40</b>	<b>Construction Support Total</b>	<b>-</b>	<b>-</b>	<b>70,000.00</b>	<b>70,000.00</b>	
<b>50</b>	<b>Construction</b>					
52	General/Primary Contractor			24,525,570.00	24,525,570.00	
57	Small Construction Contracts/PO's			20,000.00	20,000.00	
59	Miscellaneous			20,000.00	20,000.00	
<b>50</b>	<b>Construction Total</b>	<b>-</b>	<b>-</b>	<b>24,565,570.00</b>	<b>24,565,570.00</b>	
<b>60</b>	<b>In-House Construction Support</b>					
69	In house timecards			10,000.00	10,000.00	Includes Teachers, M&O, Tech Service
<b>60</b>	<b>In-House Constr. Support Total</b>	<b>-</b>	<b>-</b>	<b>10,000.00</b>	<b>10,000.00</b>	
<b>70</b>	<b>Furniture, Equipment, Materials</b>					
71	Furniture & Equipment			700,000.00	700,000.00	Includes Tech and Misc. Equip.
76	M & O Provided Materials			10,000.00	10,000.00	
79	Other			20,000.00	20,000.00	
<b>70</b>	<b>Furniture and Equipment Total</b>	<b>-</b>	<b>-</b>	<b>730,000.00</b>	<b>730,000.00</b>	
<b>90</b>	<b>CONTINGENCIES</b>					
91	Construction Contingency	-		1,226,279.00	1,226,279.00	5% of line 52
<b>90</b>	<b>CONTINGENCIES</b>	<b>-</b>	<b>-</b>	<b>1,226,279.00</b>	<b>1,226,279.00</b>	

**TOTAL ESTIMATED PROJECT COST:** 4,297,700.00 4,237,700.00 30,777,132.00 26,539,432.00

# Project Cost Estimating Report



## PROJECT SUMMARY

### SAN JUAN UNIFIED SCHOOL DISTRICT DEL CAMPO HIGH SCHOOL

Project: Integrated Learning Building  
Phase: Program  
Estimate Date: November 14, 2018  
Bid Date: December 13, 2019  
Revised Date:

### PROJECT SUMMARY

Description	Quantity	SF	Unit Cost	Subtotal Cost	Total Cost	Cost / SF
<b>New</b>						
Science Classroom	22,896	SF	\$430.00	\$9,845,280	\$13,381,561	\$584.45
Media Commons	4,025	SF	\$350.00	\$1,408,750	\$1,914,752	\$475.71
Building Support	1,058	SF	\$625.00	\$661,250	\$898,761	\$849.49
<b>Total New</b>	<b>27,979</b>	<b>SF</b>		<b>\$11,915,280</b>	<b>\$16,195,074</b>	<b>\$578.83</b>
<b>Sitework</b>						
Site Development				\$572,843	\$778,600	
Utilities				\$306,188	\$416,166	
<b>Total Sitework</b>				<b>\$879,031</b>	<b>\$1,194,766</b>	
<hr/>						
<b>SUBTOTAL</b>	<b>27,979</b>	<b>SF</b>		<b>\$12,794,311</b>	<b>\$17,389,840</b>	<b>\$621.53</b>
Estimating Contingency	15.00%			\$1,919,147		
General Conditions	7.60%			\$1,118,223		
Overhead and Profit	4.90%			\$775,752		
Insurance and Bonds	2.40%			\$398,578		
Contractor Contingency	3.00% (on direct cost of work)			\$383,829		
<hr/>						
<b>TOTAL</b>	<b>27,979</b>	<b>SF</b>		<b>\$17,389,840</b>	<b>\$17,389,840</b>	<b>\$621.53</b>
Design Fees	6.50%				\$1,130,340	
<hr/>						
<b>TOTAL W/ DESIGN</b>	<b>27,979</b>	<b>SF</b>			<b>\$18,520,180</b>	<b>\$661.93</b>
Escalation to Midpoint	10.00%				\$1,852,018	
<hr/>						
<b>TOTAL W/ ESCALATION</b>	<b>27,979</b>	<b>SF</b>			<b>\$20,372,197</b>	<b>\$728.12</b>



**SAN JUAN UNIFIED SCHOOL DISTRICT  
DEL CAMPO HIGH SCHOOL**Project: **Integrated Learning Building**Phase: **Program**Estimate Date: **November 14, 2018**Bid Date: **December 13, 2019**

Revised Date:

**PROJECT SUMMARY**

Description	Quantity	SF	Unit Cost	Subtotal Cost	Total Cost	Cost / SF
<b>Modernization</b>						
Carreer and Technology Education	11,796		\$265.00	\$3,125,940	\$4,248,732	\$360.18
<b>Total Modernization</b>	<b>11,796</b>	<b>SF</b>		<b>\$3,125,940</b>	<b>\$4,248,732</b>	<b>\$360.18</b>
<b>Sitework</b>						
Site Development				\$190,948	\$259,533	
Utilities				\$102,063	\$138,722	
<b>Total Sitework</b>				<b>\$293,010</b>	<b>\$398,255</b>	
<hr/>						
<b>SUBTOTAL</b>	<b>11,796</b>	<b>SF</b>		<b>\$3,418,950</b>	<b>\$4,646,987</b>	<b>\$393.95</b>
<hr/>						
Estimating Contingency	15.00%			\$512,843		
General Conditions	7.60%			\$298,816		
Overhead and Profit	4.90%			\$207,300		
Insurance and Bonds	2.40%			\$106,510		
Contractor Contingency	3.00% (on direct cost of work)			\$102,569		
<hr/>						
<b>TOTAL</b>	<b>11,796</b>	<b>SF</b>		<b>\$4,646,987</b>	<b>\$4,646,987</b>	<b>\$393.95</b>
<hr/>						
Design Fees	6.50%				\$302,054	
<hr/>						
<b>TOTAL W/ DESIGN</b>	<b>11,796</b>	<b>SF</b>			<b>\$4,949,041</b>	<b>\$419.55</b>
<hr/>						
Escalation to Midpoint	10.00%				\$494,904	
<hr/>						
<b>TOTAL W/ ESCALATION</b>	<b>11,796</b>	<b>SF</b>			<b>\$5,443,945</b>	<b>\$461.51</b>



# Project Document Control Report



## Request for Information

Summary Log of all Outstanding RFIs Grouped by Company

**Oak Chan ES Modernization**  
101 Prewett Drive  
Sacramento, CA 95630

**Project # 4044A1**  
Tel: Fax:

**Kitchell**

RFI #	Subject	Submitted	In Review	Date Req'd	Days Late	Amount	Delay
<b>Rainforth Grau Architects</b>							
101	4x8 Beam at GL B b/w GL's 3 & 5	10/3/2017	1	10/6/2017	-2		
102	Glulam Beams GG5 and GJ1 b/w GL's C & G	10/4/2017	0	10/11/2017	-7		



## Submittal Packages

Summary Log In Review, Grouped by To Company

**Oak Chan ES Modernization**  
101 Prewett Drive  
Sacramento, CA 95630

**Project # 4044A1**  
Tel: Fax:

**Kitchell**

Number-Rev	From Company	Description	To Company	Sent	Due	Rec'd	Days +/-	Action
<b>King's Roofing</b>								
0100-07 54 23-0	Kitchell	TPO Single Ply Roofing	King's Roofing	7/19/2017	8/2/2017		63	Revise and Resubmit
<b>Rainforth Grau Architects</b>								
0121-27 51 00-1	Kitchell	Sound/Communication System	Rainforth Grau Architects	9/29/2017	10/13/2017		-9	For Approval
0122-28 31 00-1	Kitchell	Intrusion Alarm System	Rainforth Grau Architects	9/29/2017	10/13/2017		-9	For Approval
0126-12 24 13-0	Kitchell	Roller Window Shades	Rainforth Grau Architects	9/6/2017	9/20/2017		14	For Approval
0130-06 20 00-1	Kitchell	Finish Carpentry Trim	Rainforth Grau Architects	9/21/2017	10/5/2017		-1	For Approval
0131-03 20 00-1	Kitchell	CMU Ball Wall Footings & Apparatus Curb Rebar Shop Drawings	Rainforth Grau Architects	9/21/2017	10/5/2017		-1	For Approval
0132-01 35 43-0	Kitchell	Coil Cleaner for HVAC Units	Rainforth Grau Architects	9/28/2017	10/12/2017		-8	For Approval
<b>Roebbelen Contracting Inc</b>								
0033-03 30 00-3	Kitchell	CIP Concrete (Curing Compound)	Roebbelen Contracting Inc	8/10/2017	8/24/2017		41	Revise and Resubmit
0037-10 21 13-2	Kitchell	Toilet Compartments Shop Dwgs Unit B	Roebbelen Contracting Inc	7/3/2017	7/17/2017		79	Revise and Resubmit
0076-10 14 00-1	Kitchell	Signage	Roebbelen Contracting Inc	9/12/2017	9/26/2017		8	Revise and Resubmit
0093-10 14 00-0	Kitchell	Signage (Samples)	Roebbelen Contracting Inc	7/19/2017	8/2/2017		63	Revise and Resubmit
0114-09 05 61-0	Kitchell	Moisture Vapor Control System	Roebbelen Contracting Inc	8/10/2017	8/24/2017		41	Revise and Resubmit
0125-12 93 00-0	Kitchell	Tree Grates	Roebbelen Contracting Inc	9/12/2017	9/26/2017		8	Revise and Resubmit
0131-03 20 00-0	Kitchell	CMU Ball Wall Footings & Apparatus Curb Rebar Shop Drawings	Roebbelen Contracting Inc	10/4/2017	10/18/2017		-14	Revise and Resubmit



## Potential Change Orders

Summary, Grouped by Potential Change Order Number

**Oak Chan ES Modernization**  
101 Prewett Drive  
Sacramento, CA 95630

**Project # 4044A1**  
Tel: Fax:

**Kitchell**

General Description	Allocation	Estimated	Proposed	Approved	Applied
<b>PCO #: 0001 Door 109B (RFI 006)</b>					
0001 - ROEBBE - 4044A1.02100000.5030	<b>Budget:</b> Pend Rev	525	525	525	525
Door Frame for New Opening 109B	<b>Cost:</b> Pend Commt	525	525	525	525
0002 - ROEBBE - 4044A1.02100000.5040	<b>Budget:</b> Pend Rev	(525)	(525)	(525)	(525)
Door Frame for New Opening 109B	<b>Cost:</b> Pend Commt	(525)	(525)	(525)	(525)
<b>Totals:</b>	<b>Budget:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
	<b>Cost:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

<b>PCO #: 0002 AB under Portable Bldgs</b>					
0001 - ROEBBE - 4044A1.31220000.5030	<b>Budget:</b> Pend Rev	0	15,518	0	15,518
AB Under Portable Classrooms	<b>Cost:</b> No Alloc	0	15,518	0	15,518
0002 - ROEBBE - 4044A1.31220000.5040	<b>Budget:</b> Pend Rev	0	(15,518)	0	(15,518)
AB Under Portable Classrooms	<b>Cost:</b> No Alloc	0	(15,518)	0	(15,518)
<b>Totals:</b>	<b>Budget:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
	<b>Cost:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

<b>PCO #: 0003 Pad, Power, LV for Storage Containers (CCD 011)</b>					
0001 - PASELE - 4044A1.26000000.5030	<b>Budget:</b> Appr Rev	0	3,457	3,457	3,457
Power, Low Voltage to Container (Paschke)	<b>Cost:</b> Pend Commt	0	3,457	3,457	3,457
0002 - PASELE - 4044A1.26000000.5040	<b>Budget:</b> Appr Rev	0	(3,457)	(3,457)	(3,457)
Power, Low Voltage to Container (Paschke) - Allowance Usage	<b>Cost:</b> Pend Commt	0	(3,457)	(3,457)	(3,457)

Prolog Manager

Printed on: 2/1/2019

KCI\_Integrated

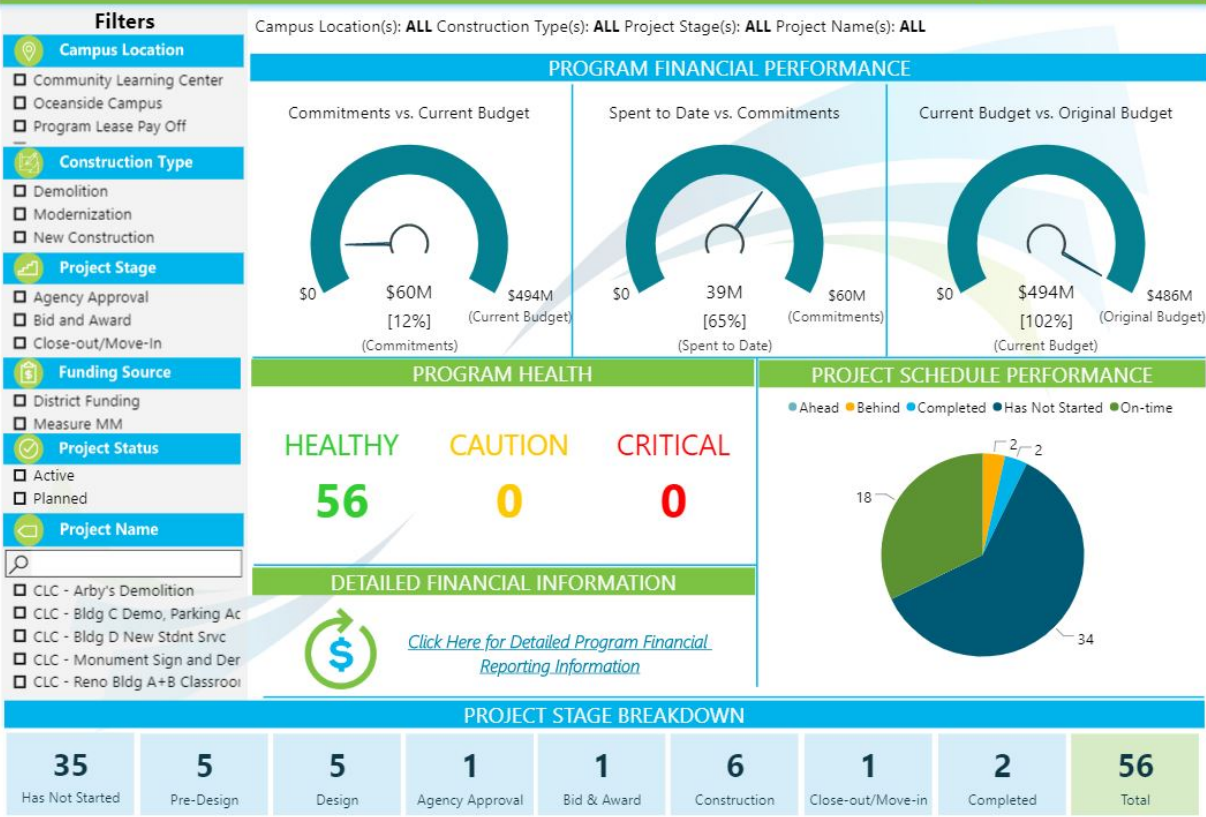
Page 1



## Capital Improvement Program Dashboard



Public  
Info.  
Website



# Required Forms

## DISTRICT PROPOSAL FORM

The Board of Trustees of the Alum Rock Union Elementary School District will select a “preferred” program management firm to perform services as described in this RFP. Once appointed by the Board of Trustees, the selected “preferred” firm shall be expected to enter into a contract with the District acceptable to both parties within 15 business days following notification of being selected to complete the project(s) as described in the RFP, subject to approval/ratification by the District’s Board of Trustees.

The following **“Offer to Enter into Agreement”** must be completed and included with responses to the RFP in order for the proposal to be accepted by the District.

## OFFER TO ENTER INTO AGREEMENT

The undersigned hereby proposes to enter into an agreement with the Alum Rock Union Elementary School District and furnish services as outlined in the request for proposals subject to the terms and conditions contained herein.


Name and Address of Firm	Signature of Authorized Officer or Employee
Name: Kitchell	Signature: 
Address: 99 South Almaden Blvd., Suite 600	Printed Name: Wendy Cohen
City and State: San Jose, CA 95113	Title: President
Telephone Number: 510.239.1790	Date: August 27, 2020
Fax Number : 916.648.6534	
Email Address: wcohen@kitchell.com	



6. **NON-DISCRIMINATION.** The Alum Rock Union Elementary School District does not discriminate in the selection, acceptance, or treatment of any contractor based upon race, color, national origin, religion, sex, sexual orientation, handicap, age, veteran's status, medical condition as defined in Section 12926 of the California Government Code, ancestry, marital status, or citizenship, within the limits imposed by law. The District likewise prohibits discrimination by contractors and subcontractors, and may require the successful vendor(s) to give written notice of their obligations to labor organizations with which they have a collective bargaining or other agreement, in compliance with Government Code 12990.

#### ACCEPTANCE OF TERMS AND CONDITIONS

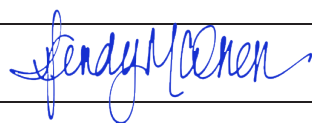
The undersigned hereby acknowledges receipt and acceptance of the above Terms and Conditions.

Authorized Signature:	
Printed Name:	Wendy Cohen
Title:	President
Date:	August 27, 2020

#### DISTRICT QUALIFICATION CERTIFICATION

I, the undersigned, certify and declare, with specific reference to the California False Claims Act, Government Code sections 12650, et seq., that I have reviewed all of the information presented in this submittal and know its contents. The matters stated in the submittal are true of my own knowledge and belief, except as to those matters stated on information and belief, and as to those matters I believe them to be true.

I declare under penalty of perjury that the foregoing is true and correct.

Authorized Signature:	
Printed Name:	Wendy Cohen
Title:	President
Date:	August 27, 2020

**DISTRICT NONCOLLUSION DECLARATION TO BE EXECUTED AND RETURNED WITH PROPOSAL**  
(Public Contract Code Section 7106)

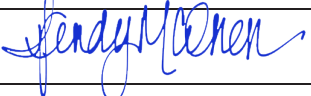
The undersigned declares:

I am the President of Kitchell, the party making the foregoing Proposal.

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

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

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on Aug. 27, 2020 [date], at Sacramento [city], CA [state]."

Authorized Signature of Proposer(s):	
Printed Name:	Wendy Cohen
Title:	President

**RETURN THIS PAGE WITH PROPOSAL**

**CERTIFICATION BY CONTRACTOR CRIMINAL  
RECORDS CHECK**  
**AB 1610, 1612 and 2102**

To the Board of Trustees of the Alum Rock Union Elementary School District:

I, Wendy Cohen, President certify that:

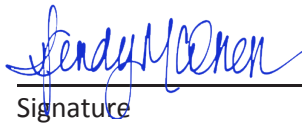
Name of Respondent

1. I have carefully read and understand the Notice to Contractors Regarding Criminal Record Checks (Education Code Section 45125.1) required by the passage of AB 1610, 1612 and 2102.
2. Due to the nature of the work I will be performing for the District, my employees may have contact with students of the District.
3. None of the employees who will be performing the work have been convicted of a violent or serious felony as defined in the Notice and in Penal Code Section 1192.7 and this determination was made by a fingerprint check through the Department of Justice.

I declare under penalty of perjury that the foregoing is true and correct.

Executed at Sacramento, CA, California on August 27, 2020

Date

  
Signature

Wendy Cohen

Printed Name

President

Title

99 South Almaden Blvd., Suite 600 , San Jose, CA, 95113

Address

510.239.1790

Telephone

**RETURN THIS PAGE WITH PROPOSAL**



### CONFLICT OF INTEREST CERTIFICATION

All respondents shall respond to each of the following questions to determine whether any actual or perceived conflict of interest exists.

PRINT NAME	Wendy Cohen
TITLE OF OFFICER	President
NAME OF COMPANY	Kitchell

As part of your Certification, please respond to the following questions listed below:

1. Have you or any of your team members or consultants been employed by the District in the last three years? [Yes] [No] If your answer is "Yes", please provide the following information:

- |                                 |       |      |
|---------------------------------|-------|------|
| a. Full-time employee?          | {YES} | {NO} |
| Part-time employee?             | {YES} | {NO} |
| As-needed employee? Consultant? | {YES} | {NO} |
| Other? Please explain below     |       |      |

Explain: N/A

- b. Dates of employment/employment contract/consulting contract?

N/A

- c. Which department(s) did employee(s) work at the District?

N/A

- d. Name of Supervisor(s)?

N/A

- e. Describe job duties and responsibilities for each District position held.

N/A

- f. Last date of employment?

N/A

2. Does (has) any District Board Member or District employee have (had) a business position, or serve as an Officer, Partner or Shareholder in your company? [Yes] [No] If the answer is "Yes", please provide the following information:
- a. Name(s) of the Board Member(s) or employee(s)?  
N/A  
\_\_\_\_\_
- b. Title/position with your company?  
N/A  
\_\_\_\_\_
- c. If anyone is (was) District Board Member or employee, what percentage of your company's shares does he/she own?  
N/A  
\_\_\_\_\_
3. Are any of your former employees or consultants presently employed by the District? [Yes] [No] If the answer is "Yes", please provide the following information for each employee:
- a. Name of former employee(s)?  
N/A  
\_\_\_\_\_  
\_\_\_\_\_
- b. Position/title with your company?  
N/A  
\_\_\_\_\_  
\_\_\_\_\_
- c. Please describe their duties and responsibilities for each position held at your company.  
N/A  
\_\_\_\_\_  
\_\_\_\_\_
- d. Dates of employment?  
N/A  
\_\_\_\_\_  
\_\_\_\_\_

By signing below responder acknowledges, agrees and certifies that by submitting its proposal it has reviewed the District’s Board Bylaws 9270 and 9270E and that, if awarded a contract pursuant to the RFP, it shall annually and timely file a signed statement of economic interest (Form 700 ) for filing with the District’s filing official. Responder further acknowledges, agrees and certifies that, if awarded a contract pursuant to the RFP, responder shall not be eligible to contract with the District to perform all or any portion of any public works project for the District during the contract term, and responder shall not be eligible to bid, attempt to qualify or be awarded a contract for construction management services for any District project.

I declare under Penalty of Perjury, under the laws of the State of California, that the above mentioned statements are true and correct to the best of my knowledge, and this declaration was executed on:

August	27
Month	Day
Sacramento	CA
City	State

  
Signature

Wendy Cohen  
Printed Name

President

Title

RETURN THIS PAGE WITH PROPOSAL

## Notice of Policy on Business Gifts and Conflicts of Interest

The following is Alum Rock Union Elementary School District's (ARUSD) policy on business gifts and conflicts of interest. Please sign and return a copy of this policy, acknowledging that you have received it and agree to abide by its terms. We also ask that you circulate the policy to any individuals in your organization that have contact with ARUSD employees.

1. Selection criteria. Vendors are selected based on the quality, timeliness, and cost of the service and/or product they provide. All business decision for ARUSD are to be based solely on what is in the best interest of ARUSD.
2. No gifts. ARUSD employees may not solicit or accept gifts, rewards, payment, commissions, gratuities, discounts, or services of any kind or value from anyone having or seeking business with ARUSD except as follows:
  - a) unsolicited token gifts such as food, flowers, and promotional items inscribed with the supplier's or customer's logo or business name, with nominal values generally not exceeding \$500 in a calendar year.
  - b) business-related functions or meals, so long as the function is necessary and the value and frequency of business meals are not excessive.
3. No personal benefit for employees. ARUSD employees may not have any personally beneficial financial dealings with any individual or business organization that furnishes merchandise, supplies, property, or services to ARUSD. This includes arrangements to receive loans (other than bank loans), commissions, royalties, stock ownership, or anything of value. ARUSD employees are also prohibited from purchasing items for personal use from vendors.
4. Personal investments. ARUSD employees directly concerned with the purchase of merchandise and services from supplier firms, including management personnel with approval authority, may not make investments in those companies, other than normal stock and bond market transactions.
5. No benefit for relatives; disclosure required. ARUSD employees may not make or influence any decision that could directly or indirectly benefit a relative and should disclose to ARUSD whenever a relative has a significant interest in a transaction or a significant relationship with an ARUSD vendor.
6. All employees covered. This policy applies to all ARUSD officers, managers, and employees. Violations of this policy may result in disciplinary action, up to and including termination.
7. Penalties for vendors. Any vendor who violates this policy shall be subject to the immediate and permanent loss of ARUSD business.

As a valued vendor of ARUSD, please acknowledge your receipt of this policy and your agreement to abide by it.

Received and agreed to on behalf of vendor by:

Signature: 

Printed Name: Wendy Cohen

Title: President

Date: August 27, 2020

Vendor Name: Kitchell

Vendor Address: 99 South Almaden Blvd., Suite 600, San Jose, CA, 95113

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99 South Almaden Blvd., Suite 600  
San Jose, CA, 95113  
[www.kitchell.com](http://www.kitchell.com)