TRiGroup, Inc.

Strategies • Solutions • Management

STATEMENT OF QUALIFICATIONS FOR PROGRAM MANAGEMENT SERVICES

PRESENTED TO:

ALUM ROCK UNION SCHOOL DISTRICT

August 21, 2020

B. Submittal Letter

August 21, 2020

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

Re: RFP No. 2021-BUS01, due August 27, 2020
Program Management Services

Responding Firm: TRiGroup, Inc.
1865 Concourse Drive
San Jose, CA 95131
Phone: 408-775-7501, 408-386-6683
FAX: 408-770-3494

Dear Mr. Chheng,

TRiGroup, Inc. is pleased to submit this Statement of Qualifications and Proposal for Program Management Services to Alum Rock Union School District.

TRiGroup, Inc. has been in business for over thirty-three years and we are ready to provide effective program management services resulting in safe, well-designed, and modern facilities for the students and the community of Alum Rock.

Facilities have a significant impact on both student and teacher outcomes. Where we find safe, modern, flexible, well-designed schools, we also find better student engagement and performance, as well as increased teacher retention and commitment. Furthermore, when local communities commit tax dollars to improve their schools, they expect only the very best results. Schools represent a promise for the future, not only for excellent teaching and learning, but also as thriving centers of parent and community engagement.

In addition to program management, our team members bring relevant experience in a wide variety of fields related to public education, giving us the ability to bridge what happens on the construction site to what ultimately happens in the classrooms and in the community. We manage facility improvement programs knowing how everything else is interrelated.

At TRiGroup, Inc. we understand these issues and firmly believe that successful management means more than accurate accounting, diligent oversight, and approved close-outs. We can help

Alum Rock Union School District realize its goals to complete capital improvement projects. We can provide an excellent communications program that includes engagement with all stakeholders, a deep commitment to the hopes of the community, and a respect for the democratic procedures that govern the process.

At the heart of our services, we recognize that public programs are a public trust so we are committed to the highest ethical standards when performing our work. We will ensure that your bond dollars work for your students, teachers, staff, and the community.

Please consider us as one of the most uniquely qualified candidates. We would be honored to work with Alum Rock Union School District.

Sincerely,

June Francis Roño, Ph.D., MBA
President & CEO

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D. Description of Firm

Founded in 1987, TRiGroup, Inc. is a skilled business and management firm specializing in working with California school districts in their bond program and facilities project management. We have been consistently growing because we truly provide a unique approach in our service delivery. We are not your typical consultants because we look at ourselves as an extension of your staff.

Members of the TRiGroup team have been involved in the program and project management of new construction and modernization projects of a variety of building types for decades. While school construction processes can be complex, potential issues can be greatly minimized or eliminated by making sure that the construction program is properly planned and all stakeholders are involved in the process. Our team understands the dynamics required of school facility projects.

We are not your typical consultants because we look at ourselves as an extension of your staff.

Beyond buildings, we build relationships!

We are cognizant that successful facility improvement programs start with candid and forthright communication with all stakeholders. We always help achieve full collaboration built on mutual respect and transparency with the School Board, District administration, staff, parents, and community members.

We are not your typical consultants because we look at ourselves as an extension of your staff. Our firm's principle is based on implementing our firm's self-developed A.R.T. program – "Accountability, Responsibility, and Transparency!"

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While school district financial limitations can affect the type and quality of projects, we believe that using "innovative" thinking coupled with practical project management practices can actually help build "more with less." TRiGroup is able to provide quality work without the expense of high overhead, and due to the efficient efforts of our experienced staff, the efficiency of our operation, and the size of our firm; savings will be spent on projects – directly benefitting students and staff.

The TRiGroup team is well-versed in working with different governmental agencies and its processes and procedures, including the Office of Public School Construction (OPSC), State Allocation Board (SAB), California Department of Education (CDE), as well as the Division of State Architect (DSA). Members of our team have an excellent track record with state agencies as well as city planning departments. Because of this knowledge, we are able to successfully use proven strategies to make sure that plans and specifications are reviewed and approved with minimal changes.

TRiGroup brings to Alum Rock Union School District a depth of understanding of your facility needs. The proposed team for Alum Rock possesses a combined experience of over 150 years and collectively has managed over $4 billion worth of school facilities projects from new construction to major school modernization projects. Our team of seasoned professionals includes architects, engineers, facilities planners, general contractors, and experienced school district administrators.

The proposed team for Alum Rock USD possesses a combined experience of over 150 years and collectively has directly managed over $4 billion worth of school facilities projects.

Our approach to program management provides for total integration of stakeholder needs. TRiGroup can provide initial study and advice before you commit full resources to planned projects. Our team is dedicated to provide our services with an ultimate goal of meeting - above all else - the needs of the students, teachers and the community. We work to make the school district shine with their community! We are your extended staff!

We work to make the school district shine with their community!

We have already developed a certain degree of institutional knowledge about Alum Rock Union School District which, in turn, will allow us to immediately deliver our services, hitting the ground running with no major "learning curve." This is highly advantageous as it reduces cost and unnecessary time by having a team that already knows what to do and how to proceed given District direction.

General Information		
Firm Name	TRiGroup, Inc.	
Firm Address	1865 Concourse Drive San Jose, CA 905131	
Firm Telephone	408-775-7501	
Firm Fax Number	408-770-3494	
Firm Email	info@TRiGroup.us	
Type of Firm (Mark an 'X' for the appropriate one)	Individual	
	Partnership	
	Corporation	X
	Joint Venture	
Primary Contact Name	Dr. June Francis A. Roño President & CEO	
Primary Contact's Telephone	408-386-6683	
Primary Contact's Email	june@TRiGroup.us	

Does TRiGroup have Program Management experience in managing school bond measures and projects?	YES
Does any member of the firm have experience as an Architect, Facilities Planner, or as a California General Building Contractor for the past five years?	YES
Has TRiGroup, Inc. declared bankruptcy or been placed in receivership within the past thirty (30) years?	NO
Have you been assessed liquidated damages for any project in the past thirty (30) years?	NO
Has TRiGroup, Inc. been terminated for cause or for any other reason from any contract(s) with school districts or any other public agencies?	NO
Are you currently or within the past thirty (30) years been involved in litigation with any California public agency particularly any school district?	NO
Have you ever failed to complete a project in the last thirty (30) years?	NO

E. Project Team

June Francis A. Roño, Ph.D., MBA
President and CEO

Dr. Roño has over thirty years of business and management experience that includes serving as an Assistant Superintendent of Business Services and Director of Facilities, Planning, and Operations for several school districts as well as being a College Chancellor. He also previously served as Vice President of the CASBO Board of Directors for Northern California and has given multiple seminars across the State.

Dr. Roño has personally managed over $1.7B in school facilities projects ranging from new construction to major renovation and modernization. He is committed to making sure that staff, community, and all education partners, are aware of where tax dollars are used. He believes in maximizing the use of bond proceeds to ensure they will go directly to helping students become successful.

Dr. Roño has worked with numerous bond programs and has collaborated with District administration, faculty, CBOC, Trades Council, School Site Council, California Department of Education, Division of State Architects, Office of Public School Construction, and the State Allocation Board - to name a few organizations.

Representative School Experience:

- Managed various new construction and modernization projects totaling $1.7 billion, including new school construction, classroom modernizations, new Performing Arts Centers, new classroom wings, new administration.
- Developed various bond program designs, project lists, and expenditure schedules
- Worked on several District Facilities Master Plans and Needs Improvement Projects

Education:

- Doctor of Philosophy in Management, International Academy of Management and Economics
- Post-Doctoral Education, Program on Negotiations, Harvard University
- Senior Fellow at the Institute of Strategic and International Studies, Philippines

Brian Rasmussen, Architect & General Contractor
Vice President - Facilities Division, Program Management

Brian Rasmussen has over thirty years of experience in the construction industry, including traditional architectural practice, development companies, design/build firms and owner of a K-12 Construction Management Firm. Being both a licensed architect and licensed general contractor gives Brian a unique perspective on the construction industry. He has a demonstrated ability for combining leadership, management, and technical skills to achieve a Client's objectives.

Brian serves as the client's advocate when communicating with both the architect and the contractor. This is invaluable in keeping a project on schedule and within budget. Brian's conceptualization skills combined with his contracting knowledge leads to excellent value engineering insight. This allows him to spot conflicts before they occur. He also has the expertise to review documents for constructability, clarity, and completeness.

Brian is well versed in all facets of public school construction and has done numerous presentations to Boards of Education and school community groups. He has worked successfully on numerous projects coordinating with different governmental agencies including the California Office of Public School Construction, Division of State Architects, and California Department of Toxic Substances Control. He is also very familiar with the California Environmental Quality Act (CEQA) process and has worked on needed mitigation measures as required by the projects.

Representative School Experience:

- Mt. Pleasant High School – Classroom modernization projects, $10M
- Pajaro Valley Unified School District, New High School, $62M
- Watsonville High School – New gymnasium, locker rooms, pool, all-weather track/field, modernization and new tennis courts, $18M
- Aptos High School – New gymnasium, performing arts theater, pool, all-weather field modernization, $24M
- Various school modernization construction projects in several school districts, $200M

Education:

- Bachelor of Architecture degree with honors, California Polytechnic State University, San Luis Obispo CA

Peter I. Parenti, Ed.D.
Vice President - Strategic Planning

Dr. Parenti is first and foremost an educator, having served as a California credentialed teacher and administrator for twenty-six years the San Francisco Bay Area, including twelve years as a middle school teacher, five years as elementary and middle school Principal, three years coordinating BTSA-Induction programs for new teachers and mentors, and six years as Director of Curriculum and Instruction and Assistant Superintendent of Educational Services.

Dr. Parenti is committed to helping school systems address issues of equity and inequity, especially as it relates to student academic achievement and parent engagement. He is well-versed in the research that also correlates these issues to access to high-quality school facilities.

Dr. Parenti brings his extensive experience and knowledge to TRiGroup and serves as the lead for business strategic planning. As it relates to public school construction, Dr. Parenti has first-hand experience as a teacher and administrator working through modernization and reconstruction projects in San Lorenzo USD and Albany USD. He knows that communication with all stakeholders is key to building trust with staff and the community and is prepared to serve as a lead in supporting TRiGroup staff to remain focused on the ultimate outcome: student and teacher success.

Education:

- Undergraduate degrees, teaching credentials, and administrative service credentials, Cal State University, Hayward and the University of Florence, Italy
- Master's Degree in Teaching Leadership, St. Mary's College of Moraga, California
- Doctorate Degree in Leadership for Equity in Education (LEEP), University of California at Berkeley

Scott Hansen
Logistics Coordinator and Expeditor

Scott Hansen has been working in the K-12 environment for over 28 years and is very familiar with the inner workings of the public school construction process. He spent 10 years working with the State of California's Office of Public School Construction (OPSC), serving in the role of School Facilities Program Analyst and then accrued additional extensive experience representing school district clients at OPSC and SAB meetings regarding their funding and apportionment of CA State-controlled modernization and new construction funds.

As a Senior Consultant at TRiGroup, Scott has worked with several school districts ranging from School Facilities Program engagements to helping with Facilities Master Plans and Needs Assessment evaluations to helping create Educational Specifications.

Mr. Hansen is an acknowledged expert in the area of new construction eligibility, planning of major school construction projects and the navigation of OPSC rules and regulations. He uses this expertise to think "outside of the box" for school districts maximizing their state funding opportunities. In addition to his consulting work with school districts throughout California, Mr. Hansen was a key contributor in 2006 in a special short-term assignment to reconfigure LAUSD's 64 high school attendance areas (HSAAs) to maximize their opportunities for new construction funding. His clientele, always the district, have ranged from three of the "Big Ten" school districts to a 175-pupil school district in central California.

As the Logistics Coordinator and Expediter in a bond program, he will make sure that projects are moving smoothly and in rapid succession according to established timelines.

Representative School Experience

- Greenfield Union School District, $20.5M
- Los Angeles Unified School District, $127M
- Saddleback Union School District, $42M
- Long Beach Unified School District, $28M
- McSwain Union School District, $3.7M
- Alum Rock Union School District, $11.8M
- Merced River School District, $1.4M
- East Side Union High School District, $80M

Sonya Perkins
Deputy Program and Project Director

Sonya Perkins brings over ten years of construction experience and has a thorough understanding of the project development and delivery cycle. She has a demonstrated ability to lead strong teams in translating organizational objectives from project inception to completion. Her diverse experience includes public works, school modernization and new construction projects, residential housing and commercial spaces. Sonya's areas of strength include construction management, bid procurement, project controls, contracts, negotiations, communications, field supervision, and project closeouts.

As Deputy Project Director for TRiGroup, Inc. Sonya supervises multiple teams currently working in Hayward USD. She provides both oversight and support in managing multiple construction and renovation projects, engages with school and district staff in the procurement of furniture and equipment, and supports her teams with expert level advice and technical assistance.

Relevant School Construction Experience:

- Ohlone Elementary School, WCCUSD, completely new construction, $40M
- Nystrom Elementary School, WCCUSD, new construction of multi-purpose room, $5.5M
- Crespi Middle School, WCCUSD, new construction of Admin. Building, $3.2M
- Pinole Middle School, WCCUSD, new athletic fields and restrooms, $5M
- Valley View Elementary School, WCCUSD, temporary campus portables, site work, underground utilities, playground, $5M
- Verde Elementary School, WCCUSD, site work, playground, drainage, $2M
- El Cerrito High School Temporary Campus, WCCUSD, portable & utility demolition, $3M

Education:

- Construction Management, CA State University of Long Beach
- Construction Management, Laney College, Oakland, CA

LeRoy Christopherson
Senior Program/Project Manager, General Contractor

LeRoy Christopherson's experience in the construction industry as a manager and general building contractor gives him a unique perspective on construction projects. He is committed to the challenge and responsibility of providing quality and cost-effective results, and his excellent reputation among Architects, Owners/Builders, Subcontractors, Inspectors, and City and State Agencies speaks to his ability to collaborate with team members.

Leroy is a strong troubleshooter and problem solver and possesses the ability to meet tight fast-track deadlines through his excellent planning, scheduling, and coordinating skills. His other strengths include estimating, budgeting, bid procedures & bid review. LeRoy brings extensive and varied experience with schools, hospitals, seismic repair and upgrades, ADA requirement upgrades, shopping centers, retail construction, hotels, multi-story buildings, tilt-up buildings, office interiors, housing tracts, new construction and remodels of custom homes.

Leroy has extensive experience with a variety and depth of school projects, many of which required maintaining operability throughout construction.

Representative School Construction Experience:

- Berryessa Union School District, Phase I Simultaneous modernization of 5 Elementary schools, $30M.
- Berryessa Union School District, Phase II Simultaneous modernization of 5 Elementary schools and 3 Middle schools, $55M.
- East Side Union High School District, Multiple classroom modernization projects, kitchen remodels, Title projects at two comprehensive high schools, $35M
- Hayward Unified School District, Fire Alarm and Clock PA system replacement at Tennyson High School, $1.7M
- Hayward Unified School District, hardcourt replacement at Eden Gardens Elementary School, $700K
- Various additional projects at multiple sites, $550M

Education

- Brigham Young University, Provo, UT, - Major Civil Engineering
- Fresno City College, Fresno, CA, - A.S. Degree – Major Mathematics

Jason Livingston, Director
Director of Communication & Outreach, Program Management

Jason serves as a Director for TRiGroup, providing for their various client relationships in capitalizing on his 25+ years of experience in the delivery of world-class H2H (human-2-human) engagement strategy and communications. A well-known leader in the field of customer experience and support, Jason brings his global expertise in community engineering and development to ensure success in any project through effective ongoing communications and best practices in community management.

Jason has held executive roles at *America Online, Inc*., *Electronic Arts*, *Clover Health*, *Riot Games*, *Cordstrap*, and *Coupang* working, leading, and living in cities across America, Russia, the UK, India, Luxembourg, Ireland, and South Korea. Jason served or serves as an advisor on several boards for *BioWare Ireland*, *Zynga Ireland*, *The San Francisco Better Business Bureau*, *Officium Labs*, *Whipper*, and *Meinah*! He is also an investor in emerging education, eCommerce, and technology companies. A recognized expert speaker and presenter, he has presented at multiple *Frost & Sullivan* Customer Contact Conferences across Europe, several *Game Developers Conferences*, and at *Irish Developers* Conferences.

Jason brings his passion for human engagement and understanding of the customer journey to the world of education in making sure that all stakeholders are engaged, informed, and connected to the success of the programs he supports as part of TRiGroup, Inc.

Education:

- Pre-Bachelor work at Brigham Young University, Idaho in Art and Education
- Bachelor's Degrees in International Relations and in Russian from Brigham Young University, Utah
- Project Management Professional Certification (PMP) from ESI International London

F. Experience of Firm with CA K-12 School Districts

Experience makes a difference!

TRiGroup, Inc. has extensive experience working with public school construction bond programs including facility master plans; coordination with different design and building disciplines; program management set-up that includes budget development, monitoring, and ongoing budget tracking - all the way to the development of project scope, schedule, and budget; and managing actual construction progress until Division of the State Architect (DSA) close outs. We are capable of providing full and complete services for the District's Bond Program.

TRiGroup brings decades of experience to these efforts. The combination of experienced big-picture program management and specific project management along with technical strength and a truly unique understanding of your District's specific needs will provide great results. Our team members have successfully worked on bond programs and facilities projects which include the following school districts and organizations:

Hayward Unified School District	Pleasanton Unified School District
Alum Rock Union School District	Greenfield Union School District
Orchard Union School District	McSwain Union School District
Merced River School District	Oak Grove Union School District
Alisal Union School District	KIPP Heartwood Academy
Berryessa Union School District	Pajaro Valley Unified School District
Spreckels Union School District	San Francisco State University
Ohlone College	Pacific Coast Christian Academy
West Contra Costa USD	S.F. Conservatory of Music

Project #1: New Construction, Harder Elementary School

Project Owner: Hayward Unified School District
Dr. Matt Wayne, Superintendent
Allan Garde, Assistant Superintendent of Business
Address: 585 Willow Ave., Hayward CA 94541
Contractor: BHM Construction
Contact: Phillip Stenson, Project Manager
221 Gateway Rd W, Ste. 405, Napa, CA 94558
(415) 866-7464 Cell
Project Description: The new Harder Elementary School will replace the existing school on the current site. The project includes demolition of the existing buildings and construction of new facilities, including kindergarten through 6th grade classrooms, administration building, multi-purpose building, library/media center, playgrounds and outdoor amphitheater.
Architect: Lionakis
Delivery Method: Lease-leaseback
Budget: $51M

Progress to Date: Construction commenced in June 2019. Sitework is complete and building construction is ongoing.
Anticipated Completion: 1st Quarter, 2021

Project #2: New Construction, Three High School STEAM Buildings

Project Owners: Hayward Unified School District
Dr. Matt Wayne, Superintendent
Allan Garde, Assistant Superintendent of Business
Address: Mt. Eden High School, 2300 Panama St, Hayward, CA 94545
Hayward High School, 1633 East Ave, Hayward, CA 94541
Tennyson High School, 27035 Whitman St, Hayward, CA 94544
Contractor: Balfour-Beatty Construction
Contact: Charles Brown, CCM, DBIA, VP/Operations 1501 Quail Street, Suite 130, Newport Beach, CA 92660 C: (858) 231-3145
Project Description: The new STEAM (Science, Technology, Engineering, Arts and Math) buildings to be added to the current high school campuses will include flexible learning spaces, science classrooms, breakout rooms and alternative workspaces, demonstration lobbies, and maker spaces.
Architect: CSDA Design Group
Delivery Method: Design-Bid-Build
Budget: $66M
Progress to Date: Project is 85% complete
Anticipated Completion: MEHS = August, 2020; HHS = Nov, 2020; THS = Sept, 2020

Project #3: Solar Generating Facilities

Project Owners: Hayward Unified School District
Dr. Matt Wayne, Superintendent
Allan Garde, Assistant Superintendent of Business
Address: Thirty-three different sites in HUSD, including the Administrative Offices 24411 Amador St., Hayward CA 94544
Contractor: Engie USA
Courtney Jenkins, Vice President ENGIE USA, 510-502-7314
David Baldwin, PE ENGIE Project Director, 408-218-9824
Project Description: The installation of solar generating facilities on 33 HUSD owned properties Included design and processing the projects through Division of the State Architect, California Geological Survey and the local Utility. The scope also included the installation of Electric Vehicle Charging Stations at 23 HUSD owned properties and monitoring hardware at all installation sites.
Delivery Method: Design/Build
Budget: $29.6M
Progress to Date: Completed December 2019

Project #4: School Modernization Projects

Project Owners: Alum Rock Union School District
Dr. Hilaria Bauer, Superintendent
Address: Adelante Elementary School, 2999 Ridgemont Dr, San Jose, CA 95127
Dorsa Elementary School, 1290 Bal Harbor Way, San Jose, CA 95122
Hubbard Middle School, 1680 Foley Ave, San Jose, CA 95122
L.U.C.H.A. Elementary School, 1711 E San Antonio St, San Jose, CA 95116
Ryan Elementary School, 1241 McGinness Ave, San Jose, CA 95127
Contractor: Multiple General Contractors
Project Description: Modernization projects at various elementary school sites, including restroom modernizations, roof replacements, and classroom expansions.
Budget: $6.82M

Project #5: New Construction and Modernization

Project Owners: Pleasanton Unified School District
Dr. Micaela Ochoa, Deputy Superintendent (Former)
(Now Vice President at San Mateo Community College District)
Address: 4665 Bernal Ave, Pleasanton CA 94566
Contractor: Sugimura Architects, Inc.

Project Description: Brand new Culinary Arts Building, Asphalt and Paving Project, Upgrade and classroom modernization projects. (The Culinary Arts building was designed, DSA approved, and received bids. However, the District decided to put the project on hold.)
Budget: $15M

G. References

At TRiGroup, Inc. we have always worked hard to secure the satisfaction and trust of our clients and we are very proud to claim that all of our clients will provide you with a high-quality review. Below is a list of five representative clients who are available for references. Further details about many of these projects are also included in the previous section of this RFQ-P titled "Experience of Firm with CA K-12 School Districts."

Reference #1: Hayward Unified School District, 24411 Amador Street, Hayward CA 94544
District Size: K-12 2018-19 student enrollment = 22,376
Dr. Matt Wayne, Superintendent mwayne@husd.us, 510-847-9937
Allan Garde, Assistant Superintendent agarde@husd.us, 510-952-6375
Services Provided: Program and Construction Management for new construction and modernization projects across the district with a budget of $610.7 million.

Reference #2: Pleasanton Unified School District, 4665 Bernal Ave., Pleasanton, CA 94566
District Size: K-12 2018-19 student enrollment = 14,978
Dr. Micaela Ochoa, VP of Administrative Services, College of San Mateo
(formerly Assistant Superintendent of Business for Pleasanton USD)
ochoam@smccd.edu, (650) 574-6480
Services Provided: Program Management for new construction and modernization projects across the district with a budget of $15 million.

Reference #3: Alum Rock Union School District, 2930 Gay Avenue, San Jose, CA 95127
District Size: K-8 2018-19 student enrollment = 10,744
Dr. Hilaria Bauer, Superintendent, hilaria.bauer@arusd.org, (408) 928-6822
Services Provided: Program and Construction Management for various modernization projects across the district with a budget of $6.82 million.

Reference #4: Greenfield Union School District. 493 El Camino Real, Greenfield, CA 93927
District Size: K-8 2018-19 student enrollment = 3,616
Fernando Nieto, Executive Director of Facilities, Maintenance, Operations, and Transportation, fnieto@greenfield.k12.ca.us, 831-674-2840 x2659
Services Provided: Program Management for modernization projects, developing educational specifications and the current Facilities Master Plan. We also serve as State Program Consultant for school facilities projects and related funding applications with a budget of $20.5 million.

Reference #5: McSwain Elementary School District, XXX
Jody Beard, Chief Business Officer, jbeard@mcsain.k12.ca.us, (209) 354-2700 x705
District Size: K-8 2018-19 student enrollment = 876
Services Provided: Update the District's current eligibility status with the Office of Public School Construction's School Facility Program, assisting with the financial

hardship review process with OPSC, prepared and submitted applications for funding for modernization projects, with a budget of $1.3 million.

TRiGroup, Inc. has provided services to the clients listed above in several key areas of expertise that are relevant and beneficial to the needs of Alum Rock. More specifically, in the area of program management, we have helped our clients create financial plans and project schedules. We have prepared materials and facilitated the public bid process for various types of construction services.

We have worked with various stakeholder groups in a variety of Districts, to articulate needs, prioritize those needs with schedules and budgets, and to maintain ongoing communication using face-to-face meetings, social media platforms, and website pages.

We are skilled in advising our clients and representing them in relation to the various state agencies including the Department of State Architects (DSA), the Office of Public School Construction (OPSC), the California Department of Education (CDE), as well as local agencies, such as city planning department, fire and police departments, and others. Furthermore, we have advised our clients on the selection of the Inspector of Record (IOR) and we have coordinated the work of sub-consultants including the Department of Toxic Substances Control (DTSC), California Environmental Quality Act (CEQA), and others.

H. Proposed Methodology and Capabilities

Program and Implementation Planning

TRiGroup, Inc. has extensive experience with **program and implementation planning** in several California school districts for both **new construction and modernization projects**. The most recent experience comes from our partnership with Hayward Unified School District, where we currently manage two large bond programs. In close collaboration with the staff, the community, and the Board of Education, we carefully and continually assess current conditions, plan the scope of work, coordinate the various schedules related to all phases of each project, as well as assist in the bidding process and the hiring of consultants.

We have experience managing multiple building types, including traditional framing, modular construction, and prefabricated buildings.

In our work, **condition assessments** are a critical step in the planning phase for school construction and modernization projects and correlate directly with **facility design standards and master specifications**. We have relevant and direct experience and most recently helped Hayward complete a district-wide assessment of more than thirty (30) school sites by establishing a matrix of critical areas of need, and then working with the community and the Board to agree on both a priority list and a timeline. We coordinated and then facilitated the walk-throughs of every campus with a team of District staff.

Condition Assessments are a critical step in the planning phase and correlate directly with facility design standards and master specifications.

During each campus visit, we completed visual inspections with District maintenance staff and hosted interviews with site staff, recording all of the various issues into categories such as health/safety, educational programs, sustainability, and aesthetic value. From there, we were able to organize teams of contractors and architects to respond accordingly with proposals, schedules, and budgets. We have also worked specifically with educators to establish design standards for classroom modernization projects, as well as with other staff to create master specifications for their areas of specialty on the campus, including custodial, physical education, after school programs, and more.

Master specifications will almost invariably include features related to **technology infrastructure and other types of low-voltage communication systems**. In this regard, we are very familiar with established guidelines to upgrade or re-build fire alarms, public announcement systems, VOIP telephone services, wired and wireless internet access, and more. We also have the additional experience of applying for specialized funding from the State to repair or replace systems related to health and safety issues. Our current work in Hayward includes master planning and program management for modernization projects In Greenfield, we have recently secured funds to replace fire alarms and PA systems in three school sites. We also know how best to work with local and state agencies on these projects, including the local building inspectors, local fire and police departments, as well as the CDE, DSA, and OPSC. With these partners in the community, we can secure the necessary industry concurrence with certain system issues and then advocate for our clients to be awarded approvals and funding.

TRiGroup has worked extensively with **ground-up framed building** construction projects to **prefabricated buildings** on slab concrete foundation with stucco siding or concrete walls. We have also worked on projects using **traditional modular buildings** on piers.

There are several options that school districts can consider when making the decision of what type of buildings they would like to be constructed. Determining which option will best serve the needs of a school district, it will have to factor in available funding and time schedule. While ground-up, framed building construction cost more as compared to modular building construction, there are distinct advantages to consider regarding modular or prefabricated buildings.

Our team has worked with school districts to help evaluate which options would make the best sense after considering the overall goals of the District, its budget, schedule, and stakeholder expectations. Because of our experience, we can help school districts navigate through these kinds of discussions with their staff and community.

Our extensive experience also includes the important responsibility of **scheduling** the complicated steps that move projects from initial design phase to final delivery. While this usually involves coordinating the timelines of various contractors, consultants, state agencies, and local staff, it can often include a careful consideration of the current educational program that is taking place on the campus.

Very often, work has to be done while school is in session and we work hard so that our projects have a minimal impact on the teaching and learning that takes priority over everything else. Our experience in scheduling comes from working with a variety of school districts. As an example, we are coordinating the schedules for a complex modernization project for Lorin Eden Elementary School, a project that requires phases in design, DSA approvals, three separate construction phases, interim housing, new furniture acquisition, and more. Our scheduling takes into consideration the need to complete the entire project within 18 months and involves both modernization and new construction, all while respecting the need for the school to function successfully.

Accountable, Responsible, and Transparent Management

Our approach to **budgeting**, **cost tracking, and document control** starts with our commitment to "Accountability, Responsibility, and Transparency" (A.R.T.). We take pride in managing public tax dollars and hold ourselves to the highest moral and ethical standards. The A.R.T. program was designed with this commitment in mind and we have been trusted many times with both small and large budgets.

Our goal is to protect the interests of the community by scrutinizing every projected cost and searching for every possible efficiency without compromising the quality of the project. Our practices include a highly detailed and organized system of receiving and cataloging all requests, submittals, invoices, and correspondence. We use internal bookkeeping methods to correlate accounts payable to accounts receivable and we are proud to maintain our open-book policy for our clients and for the public. We have our own proprietary software system to manage documents and budgets. Once the project is complete, TRiGroup, Inc. provides the District/Client with a complete set of documents in PDF format. All of our proprietary software is available to Districts for a negotiated fee.

Our most recent experience includes managing the Hayward Unified School District's Measure H and Measure L bond programs, a $610.7 million-dollar district-wide effort to modernize existing facilities, as well as build new facilities, including an elementary school and a performing arts center. We have taken full responsibility to guide the District through the process of prioritizing a timeline and a scope that maximizes every dollar in the program.

When it comes to **cost estimating**, we prefer to partner with experts in the field who specialize in this service. We have extensive experience working with several different experts who have helped estimate costs ranging from completely new school construction, to new fire alarms systems, roofs and updated classrooms.

Our **quality control systems** are rooted in the three most important components of a project: Scope, Schedule, and Budget. This paves the way to a clearer and succinct understanding of the project and provides the District with reliable information to make informed decisions. Having both design and construction staff allows us to monitor the design process and the construction process with an eye for constructability and efficiency. We can review plans and assess for quality in construction, design, and cost. Furthermore, during the construction phase, we work in close collaboration with the Inspector of Record (IOR) to be sure that the project is in alignment with the original plans and expectations.

We have experience **monitoring consultants**, including architects and contractors, working together with them to maximize time and resources so that projects are completed on schedule with within budget. Our consultants appreciate our philosophy and approach because they trust us to be working in the best interest of the District, helping them avoid unnecessary complications that arise when communication is not clear and expectations are not transparent.

Scope, Schedule, and Budget: the three most important components in managing a project.

Sustainable Practices and Value Engineering

Our experience with **sustainability and energy management** includes helping Districts complete an initial audit of energy use, setting goals to reduce waste, and then creating actionable plans to implement change. In Hayward Unified School District, we completed this work in 2019, and served as both financial analysts and construction managers that lead to the installation of solar generating electrical systems on all campuses. Staff now have shaded parking, free access to electric vehicle charging stations; and the District now saves millions of dollars annually from the general fund budget. As it relates to other types of construction management, we are experienced in methods that reduce waste, divert storm water, increase access to natural air and light, and utilize materials that are non-toxic and non-hazardous to people and the environment.

We have experience in **value engineering**, reviewing established plans and related costs and determining if something can be accomplished in a more economical way. For example, we saved Hayward USD over 500K on one project alone by re-evaluating established plans for storm water collection and created an approved, alternative solution for storm water detention.

Informing, Engaging, and Inspiring the Community

Ultimately, these projects belong to the community and we are proud to be part of the process to engage all constituents from start to finish. Towards this end, we provide a full range of services in the areas of communication and decision-making. We can take full responsibility for leading the Citizen's Bond Oversight Committee, providing them with the required quarterly reports and facilitating their meetings. We work together with District staff to present at Board meetings and workshops, and we can design a communications program to keep all constituents well-informed about budgeting and scheduling. We can also manage the District's **public information website** for the Bond programs, providing weekly updates and posting on various social media platforms. In Hayward USD, we also host labor partner meetings where we can dialogue early on about issues before they become problems and work together to promote as much participation from staff as possible.

Engaging stakeholders, especially the staff who will use the buildings every day, needs to include **helping them make informed decisions** early on about design and later during the construction and delivery phases. In fact, especially during the design phases, we work with school communities to listen carefully and respond to their ideas about what they need in the new facilities. We know that there's nothing worse that moving through a project that didn't start with a careful assessment of what people really need in order to do their best teaching and learning. In Hayward, for example, we have facilitated meetings with teachers at various sites and in district-wide committees to determine design standards related to interior wall and window treatments, furniture styles, floor plans, and the locations of outdoor spaces such as drop-off, pick-up areas, athletic spaces, and more.

It is also critical to maintain this engagement during the construction phases, especially when the programs are still operating on the campus. For example, a roofer pounding away on top of a classroom where AP testing is taking place is NOT GOOD. So, we coordinate our schedules with site administrators to be sure they have input on when and where work is taking place.

Governmental Agency Experience

TRiGroup, Inc. is proud to be actively involved with the various government agencies that oversee public school construction. We recognize that school districts often need both the financial assistance from State bonds and general budgets, as well as the required official approvals and assurances that these agencies expect.

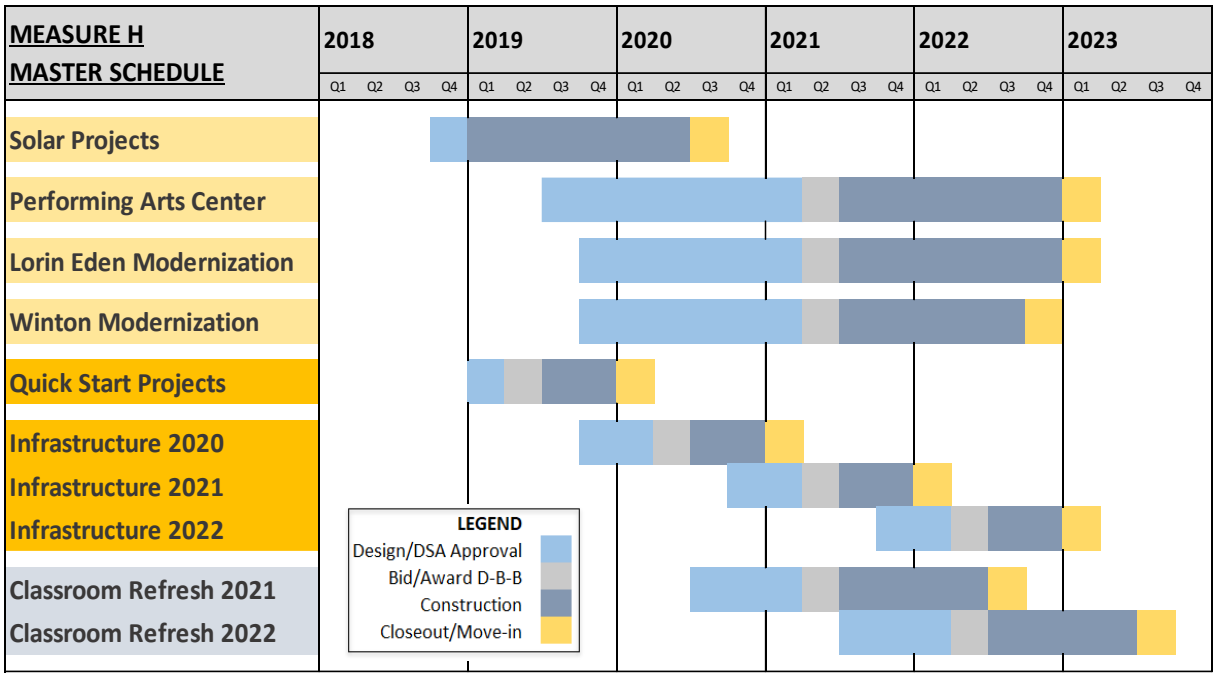
We are well-informed about how the various agencies interrelate with one another and our staff have many years of experience working directly for the Office of Public School Construction. We represent our clients in the application process, design phase, approval process, and close-out phases for their projects. Our most recent experience comes from our partnership with Greenfield Elementary Union School District, working with them to secure much-needed funds to install new fire alarm systems, to modernize and rebuild school sites, to apply for financial hardship, facility hardship, and Full Day Kindergarten funding programs.

Sample Reports

Sample #1 "Scheduling"

The following is an excerpt from our March, 2020 update to the Hayward USD Citizen's Bond Oversight Committee (CBOC). It shows our ability to schedule multiple, complex projects with various points of pertinent information.

Current Program Schedule



Ninety-Day Look Ahead

The following key activities are scheduled between February 1, 2020 and April 30, 2020:

- Continue to manage the design teams for the 2020 infrastructure projects.
- Solicit bids and assist HUSD with award of contracts for the 2020 infrastructure projects.
- Assist HUSD with presenting the classroom standard to the curriculum councils in March and the Board of Trustees in April.
- Continue to manage the development of the design documents for the Performing Arts Center project and the Lorin Eden and Winton Modernization projects.

Sample #2 "Budgeting"

The following is an excerpt from our March, 2020 update to the Hayward USD Citizen's Bond Oversight Committee. It shows our ability to manage budgets and communicate essential information to the all stakeholders.

Program Budget

The Program Budget adopted by the HUSD Board of Trustees at the May 8th, 2019 facilities workshop is presented below. The table has been modified to break out the Program Costs.

HUSD Measure H Bond - Budget				
	Hard Costs	Soft Costs	Program Costs 8.25%	Total
Total Bond Amount				**$381,700,000**
Program Contingency (10%)			$3,149,000	$38,170,000
Known Commitments				
Solar Project	$28,465,000	$554,000	$2,609,000	$31,628,000
District Performing Arts Center	$33,754,000	$8,669,000	$3,815,000	$46,238,000
Lorin Eden ES Modernization	$19,800,000	$5,085,000	$2,238,000	$27,123,000
Winton MS Modernization	$11,000,000	$2,825,000	$1,243,000	$15,068,000
Proposed Quick Start Projects	$8,254,000	$2,120,000	$933,000	$11,307,000
Infrastructure Improvements			$9,666,000	$117,166,000
Classroom Refresh			$7,838,000	$95,000,000
Total Allocation Amount			**$31,491,000**	**$381,700,000**

Bond Sales

In the November 2018 election, HUSD was authorized by the voters to sell bonds. In March 2019, the District sold the initial series of bonds for Measure H in the amount of $145 million. It is anticipated to sell the second series of bonds in late spring of 2020. The third and final series is to be sold at a date to be determined.

Program Funding

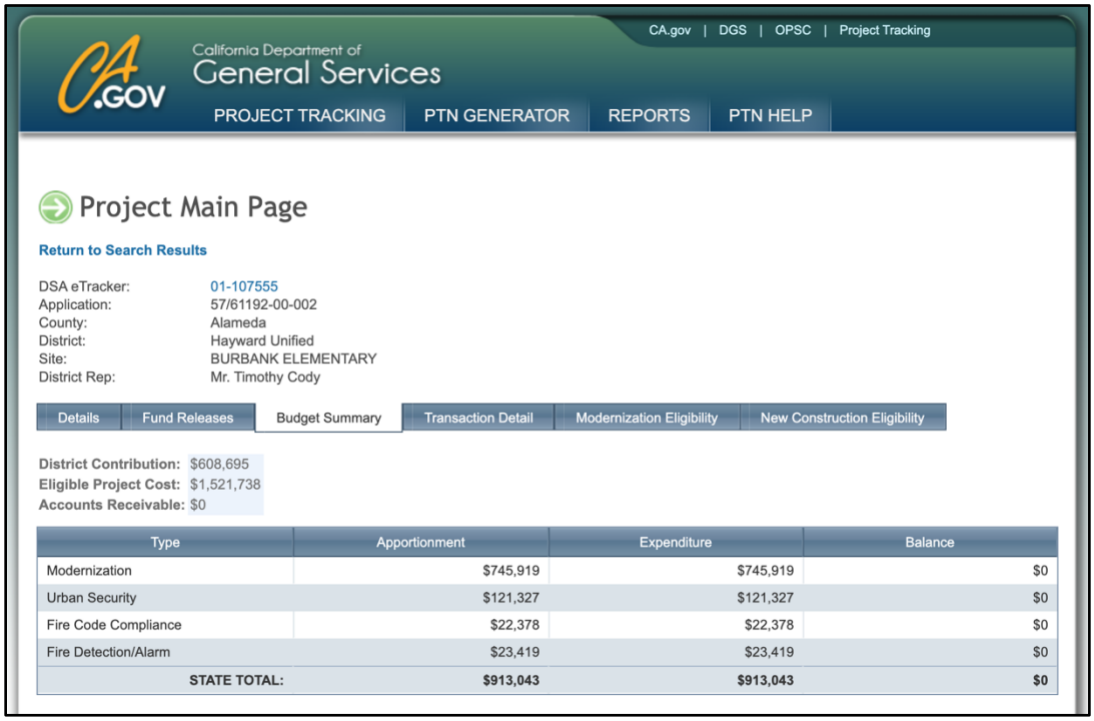
The table below summarizes the funding sources identified by the District:

Funding Source	**Amount**
March 2019 Series	$145,000,000
Interest (thru 2nd Qtr 2019-20)	$ 2,204,233
Total Funding Currently Available	$147,204,233

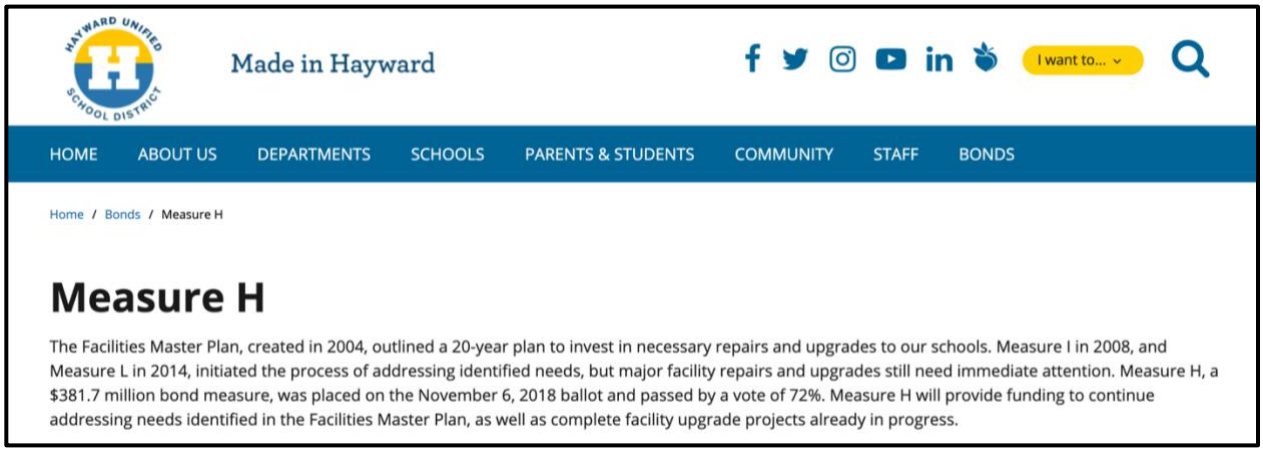
As of January 31st, 2020, the Program has encumbered $71.52 million in contracts and has expended approximately $37.39 million.

Sample #3 "Public Information Website"

The following two screenshots show our ability in two key areas: 1) to research pertinent information related to CA State funded school facility projects (dgsapps.dgs.ca.gov/) and 2) to design and regularly update pertinent information related to a District's school construction and modernization program (husd.us/measureh2018)



Type	Apportionment	Expenditure	Balance
Modernization	$745,919	$745,919	$0
Urban Security	$121,327	$121,327	$0
Fire Code Compliance	$22,378	$22,378	$0
Fire Detection/Alarm	$23,419	$23,419	$0
STATE TOTAL:	$913,043	$913,043	$0



Sample #4: "Document Control"

The following example of document control demonstrates our ability to document and track progress in key areas including Requests for Information (RFI), Submittals, and Proposed Change Order (PCOs).

TRiGroup, Inc.
Strategies • Solutions • Management

Open Items Report

Project: Harder Elementary School

Project #	L035
DSA File #	1-13
DSA App #	01-117934

RFI Open Items — No. Open RFI's: 3

RFI #	Rev #	RFI Subject	Date Submitted	Date to AE	Date from AE	AE Agng	Date to Ownr	Date from Ownr	Date Issued	RFI Agng	RFI Comments
134	0	Inc. 2 and 3- Plumbing- Drilling Studs	25-Feb-20	25-Feb-20		15	25-Feb-20	02-Mar-20		15	
136	0	Inc. 2- Electrical- Bldg. L Exterior Speakers	03-Mar-20	04-Mar-20		7	04-Mar-20			8	
138	0	Inc. 2- Electrical- Workroom A119 North and South Walls	06-Mar-20	06-Mar-20		5	06-Mar-20			5	

Submittal Open Items — No. Open Submtl's: 4

Sub #	Rev #:	Spec Section	Submittal Description	Date Submtd	Date to AE	Date from AE	Submittal Status AE	AE Age	To Owner	From Ownr	Sub Status Owner	Date Issued	Sub Age	Comments:
118	1	079500	Inc. 2- Expansion Control	24-Feb-20	25-Feb-20			15	25-Feb-20				16	
126	2	114000	Inc. 2- Foodservice Equipment- Revised Freezer Cooler Shops	04-Mar-20	04-Mar-20			7	04-Mar-20	06-Mar-20	Rvwd/Corrections		7	
140	0	074243	Inc. 2 and 3- Aluminum Composite Wall Panels- Shop Drawings	05-Mar-20	06-Mar-20	09-Mar-20	Reviewed	3	06-Mar-20				6	
147	1	013216	Construction Schedule Update- March2020	09-Mar-20			Not Reviewed		09-Mar-20				2	

PCO Open Items — No. Pending COR's: 3 — No. Open PCO's: 3

PCO #	Rev #:	Description	Alwc	Date Sbmt	Submtd Amt	Days	Status:	Aging	Comments
7	0	Bid to DSA HVAC changes	☑	25-Feb-20	$84,238.00	0	Pending	15	
8	0	DSA Hollow Metal Door and Hardware Changes	☑	03-Mar-20	$17,982.00	0	Pending	8	
9	0	DSA Framing Drywall Insulation Finish Taping Lath and Plaster	☑	05-Mar-20	$17,495.00	0	Pending	6	

Sample #5: "Cost Estimating"

The example below, a brief excerpt from our coordination of the HUSD Facility Master Plan 2018 update, demonstrates our ability to coordinate and document accurate cost projections related to school facilities projects. Regarding **cost estimating**, we prefer to partner with specialists in this field. We have extensive experience working with experts who estimate costs ranging from a completely new school construction, to new fire alarms systems, roofs and updated classrooms.

APPENDIX A – UNIT COST PROJECTIONS

Below is a composite unit cost list of potential projects that may be included in the 2018 Bond Profile.

Subject	Detailed Description - Installed Price	Unit Cost (2018)	Unit
Ground Mounted Solar Structure	Installation of DSA approved, pre-checked , stand alone shade and/or parking structure. Includes all structural elements, electrical and solar panel components including inverter assembly and all requisite operational components. Engineered to provide for up to 85% of historical use	$25,700,000	l.s.
Centralized Irrigation Management System	Installation of a district-wide irrigation management system including remote operation, flow monitoring and control, automatic shut-off, automate problem and leak reporting, software, central control station, flow metering valves, controllers and on-site support and training - Assume $110k for elementary, $135k for middle schools and $200k for High Schools, and $15k for the DO and 110k for other sites each.	$4,700,000	l.s.

I. Legal Issues

The past performance record of TRiGroup, Inc. is impeccable. In fact, we have a long-standing work ethic based on "Accountability, Responsibility, and Transparency (A.R.T.)." We believe in establishing a trusted relationship, based on moral and ethical standards of service. Especially as it relates to public education and public tax dollars, we hold ourselves and our affiliates to the highest of professional standards and performance and we follow all applicable rules and laws that govern our work.

Our responses to the specific questions outlined in the Alum Rock Union School District RFP No. 2021-BUS01 are as follows:

1. TRiGroup, Inc. has NO legal action currently pending against the firm, nor any affiliated firm by another public agency related to our services.
2. TRiGroup, Inc. has NEVER entered into any settlements or had judgements against it at any time or in the history of the firm working with school districts.
3. TRiGroup Inc. has NEVER had any service contract terminated by a California public agency.
4. TRiGroup, Inc. has NEVER been sued by any public agency for fraud or false claims.
5. TRiGroup, Inc. has NEVER filed for bankruptcy protection and has NEVER been declared insolvent by any court. TRiGroup, Inc. has NEVER had a receiver appointed to manage the assets of the firm.

J. Fees

TRiGroup's approach to fees is unique when compared to standard construction management services fee structures. We will provide a fully "open-book" accounting of all our costs when providing services to the Alum Rock Union School District! TRiGroup is familiar with providing professional Program Management using a variety of fee structures, including Time and Material, and percent of project budget cost. Regardless of which fee structure is ultimately decided during negotiations, TRiGroup is committed to provide exceptional service at very reasonable and competitive rates.

TRiGroup is unique in our fee structure as we are willing to commit to a fixed fee, without any further request for additional compensation, regardless of construction market conditions. Our fee is never tied to nor impacted by any construction cost increases. We are committed to our fee from start to completion of the construction project following an agreed upon service delivery schedule.

General Conditions Expenses are not included in the hourly rates or the percentage fee rate and these reimbursable expenses typically include, but are not limited to: (a) Expenses related to

project office including rent, utilities, maintenance, furnishings, office equipment, data processing equipment/software, office supplies, telephone systems and related charges; (b) Insurance in

excess of current coverages; (c) Transportation in connection with the Program, authorized out-of-town travel and subsistence, and electronic communications; (d) Fees paid for securing approval of authorities having jurisdiction over the program/projects; (e) Costs of bid advertising and mailing/shipping; (f) Program Cost Control software and Project Management Collaboration Application Software; (g) Prints, Plans, or Specifications required by client or the Client's other consultants and any other specialty consultants, including all reproductions required by approval authorities having jurisdiction over the program and projects. All reimbursables will be at cost plus ten percent mark-up.

Schedule of Hourly Labor Rates
July 2020-June 2021

Classification	**Hourly Rate**
Principal in Charge	$215.00
Vice President	$210.00
Program Director	$205.00
Deputy Project Director	$200.00
Director of Communications and Outreach	$195.00
Senior Project Manager	$185.00
Project Manager, Contracts Manager	$175.00
Field Engineer	$125.00
Coordinator of Budget and Program Controls	$145.00
Records Repository Manager	$145.00
Senior Project Coordinator	$140.00
Logistics Coordinator/Expediter	$130.00
Administrative Assistant	$ 87.00

Hourly rates shall have an adjustment of 3% to account for inflation each year in July, starting 2021.

The process to determine the fee will be a joint effort so that all stakeholders understand what the effort to complete the task is and that the fee is commensurate with the tasking. Our basic fixed fee percentage structure is 2.75% to 3.85% for bond program management. Our fees are subject to a final discussion and agreement with Alum Rock Union School District.

APPENDIX A: District 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: TRIGROUP, INC.	Signature: June G. Ro
Address: 1865 CONCOURSE DRIVE	Printed Name: JUNE FRANCIS RONI
City and State: SAN JOSE, CA 95131	Title: PRESIDENT / CEO
Telephone Number: 408-386-6683	Date: 8/4/2020
Fax Number : 408-770-3494	
Email Address: JUNE@TRIGROUP.US	

RETURN THIS PAGE WITH PROPOSAL

DISTRICT TERMS AND CONDITIONS

1. **INSTRUCTIONS AND USE OF FORMS.** In order to preserve uniformity and to facilitate the award of contracts, Respondents shall complete and return the enclosed District-required forms with their responses.

2. **ACCEPTANCE OR REJECTION OF RESPONSES.** The District reserves the right to reject any and all responses that are incomplete, contain errors, arrive after the due date/time or are submitted by unqualified vendors. The District reserves the right not to award a contract if the District, in its sole discretion, deems the responses received pursuant to this RFP lacking in any respect or insufficient to meet the District's requirements and needs, or for no reason at all.

3. **PROPOSAL PROTESTS.** The following instructions must be followed by a respondent who wishes to challenge the District's selection and award of any contract pursuant to this Request for Proposal:
   a) Any protest must be submitted in writing to Alum Rock Union Elementary School District, Att: Kolvira Chheng 2930 Gay Avenue; San Jose, CA 95127 on the fifth (5th) business day following the District's notification of its intention to award a contract pursuant to this RFP.
   b) Only vendors who submitted a proposal in response to this RFP may file a protest.
   c) Protests must contain the following specific information:
      - Protestor's name, address, telephone number and email address;
      - Date on which protestor's response was submitted to the District;
      - Protestor's specific, detailed basis for the protest, which must be supported by facts and/or documentation. Protests based on hearsay, feelings or opinions not supported by facts, will be deemed invalid.
   d) The protestor shall send a copy of the initial protest document and any attached documentation to all other parties that may be affected financially by the outcome.
   e) The District will review and evaluate the protest for validity, including, if required, review by outside counsel. The District and/or counsel will provide a response within ten (10) business days of review of the protest letter.
   f) If upon review, the proposal protest is found to be frivolous or lacking validity, the protest will be rejected and the protesting party may be deemed ineligible to participate in future District bidding or contracts.

4. **ASSIGNMENT PROHIBITED.** No contract awarded under this proposal shall be assigned without the express, prior written approval of the District. Any attempted assignment in violation of the provision may be voided at the option of the Board of Trustees.

5. **NO CONTACT WITH BOARD OF TRUSTEES.** Respondents may not contact any member of the Alum Rock Union Elementary School District Board of Trustees regarding this RFP, unless specifically invited to an interview conducted by the Board.

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:	June A. Rojo
Printed Name:	JUNE FRANCIS A. ROJO, Ph.D.
Title:	PRESIDENT / CEO
Date:	8/4/2020

RETURN THIS PAGE WITH PROPOSAL

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:	June A. Roño
Printed Name:	JUNE FRANCIS A. ROÑO, Ph.D.
Title:	PRESIDENT / CEO
Date:	8/4/2020

RETURN THIS PAGE WITH PROPOSAL

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

The undersigned declares:

I am the PRESIDENT | CEO of TRIGROUP, INC., 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 8/4/20 [date], at SAN JOSE [city], CA [state]."

Authorized Signature of Proposer(s):	June G. Rono
Printed Name:	JUNE FRANCIS A. RONO, Ph.D.
Title:	PRESIDENT | CEO

RETURN THIS PAGE WITH PROPOSAL

NOTICE TO CONTRACTORS REGARDING CRIMINAL RECORDS CHECK
(EDUCATION CODE SECTION 45125.1)

Education Code Section 45125.1 provides that if the employees of any entity that has a contract with a school district may have any contact with pupils, those employees shall submit or have submitted their fingerprints in a manner authorized by the Department of Justice together with a fee determined by the Department of Justice to be sufficient to reimburse the Department for its costs incurred in processing the application.

The Department of Justice shall ascertain whether the individual whose fingerprints are submitted to it has been arrested or convicted of any crime insofar as that fact can be ascertained from information available to the Department. When the Department of Justice ascertains that an individual whose fingerprints were submitted to it has a pending criminal proceeding for a violent felony listed in Penal Code Section 1192.7(c), or has been convicted of such a felony, the Department shall notify the employer designated by the individual of the criminal information pertaining to the individual. The notification shall be delivered by telephone and shall be confirmed in writing and delivered to the employer by first-class mail.

The contractor shall not permit an employee to come in contact with pupils until the Department of Justice has ascertained that the employee has not been convicted of a violent or serious felony. The contractor shall certify in writing to the governing board of the school district that none of its employees who may come in contact with pupils have been convicted of a violent or serious felony.

Penal Code Section 667.5(c) lists the following "violent" felonies: murder; voluntary manslaughter; mayhem; rape; sodomy by force; oral copulation by force; lewd acts on a child under the age of 14 years; any felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant inflicts great bodily injury on another; any robbery perpetrated in an inhabited dwelling; arson; penetration of a person's genital or anal openings by foreign or unknown objects against the victim's will; attempted murder; explosion or attempt to explode or ignite a destructive device or explosive with the intent to commit murder; kidnapping; continuous sexual abuse of a child; and carjacking.

Penal Code Section 1192.7 lists the following "serious" felonies: murder; voluntary manslaughter; mayhem; rape; sodomy by force; oral copulation by force; a lewd or lascivious act on a child under the age of 14 years; any felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant personally inflicts great bodily injury on another, or in which the defendant personally uses a firearm; attempted murder; assault with intent to commit rape or robbery; assault with a deadly weapon on a peace officer; assault by a life prisoner on a non-inmate; assault with a deadly weapon by an inmate; arson; exploding a destructive device with intent to injure or to murder, or explosion causing great bodily injury or mayhem; burglary of an inhabited dwelling; robbery or bank robbery; kidnapping; holding of a hostage by a person confined in a state prison; attempt to commit a felony punishable by death or imprisonment in the state prison for life; any felony in which the defendant personally uses a dangerous or deadly weapon; selling or furnishing specified controlled substances to a minor; penetration of genital or anal openings by foreign objects against the victim's will; grand theft involving a firearm; carjacking; and a conspiracy to commit specified controlled substances offenses.

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, JUNE FRANCIS ROÑO, Ph. D. 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 SAN JOSE, California on 8/4/2020
Date

Signature

JUNE FRANCIS ROÑO, Ph.D.
Printed Name

PRESIDENT | CEO
Title

1865 CONCOURSE DRIVE, SAN JOSE CA 95132
Address

408-386-6683
Telephone

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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 June Francis Romo, Ph.D.

TITLE OF OFFICER President / CEO

NAME OF COMPANY TRI GROUP, INC.

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: _____

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

      _____

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

      _____

   d. Name of Supervisor(s)?

      _____

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

      _____

   f. Last date of employment?

      _____

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)?

_____

b. Title/position with your company?

_____

c. If anyone is (was) District Board Member or employee, what percentage of your company's shares does he/she own?

_____

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)?

_____

_____

b. Position/title with your company?

_____

_____

c. Please describe their duties and responsibilities for each position held at your company.

_____

_____

d. Dates of employment?

_____

_____

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
Month

4 ,2020
Day

SAN JOSE
City

CA
State

Signature

JUNE FRANCIS ROND, Ph.D.
Printed Name

PRESIDENT | CEO
Title

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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: June G. Romo

Printed Name: JUNE FRANCIS ROMO, Ph.D.

Title: PRESIDENT | CEO

Date: 8/4/2022

Vendor Name: TRIGROUP, INC.

Vendor Address: 1865 CONCOURSE DRIVE, SAN JOSE, CA 95131

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