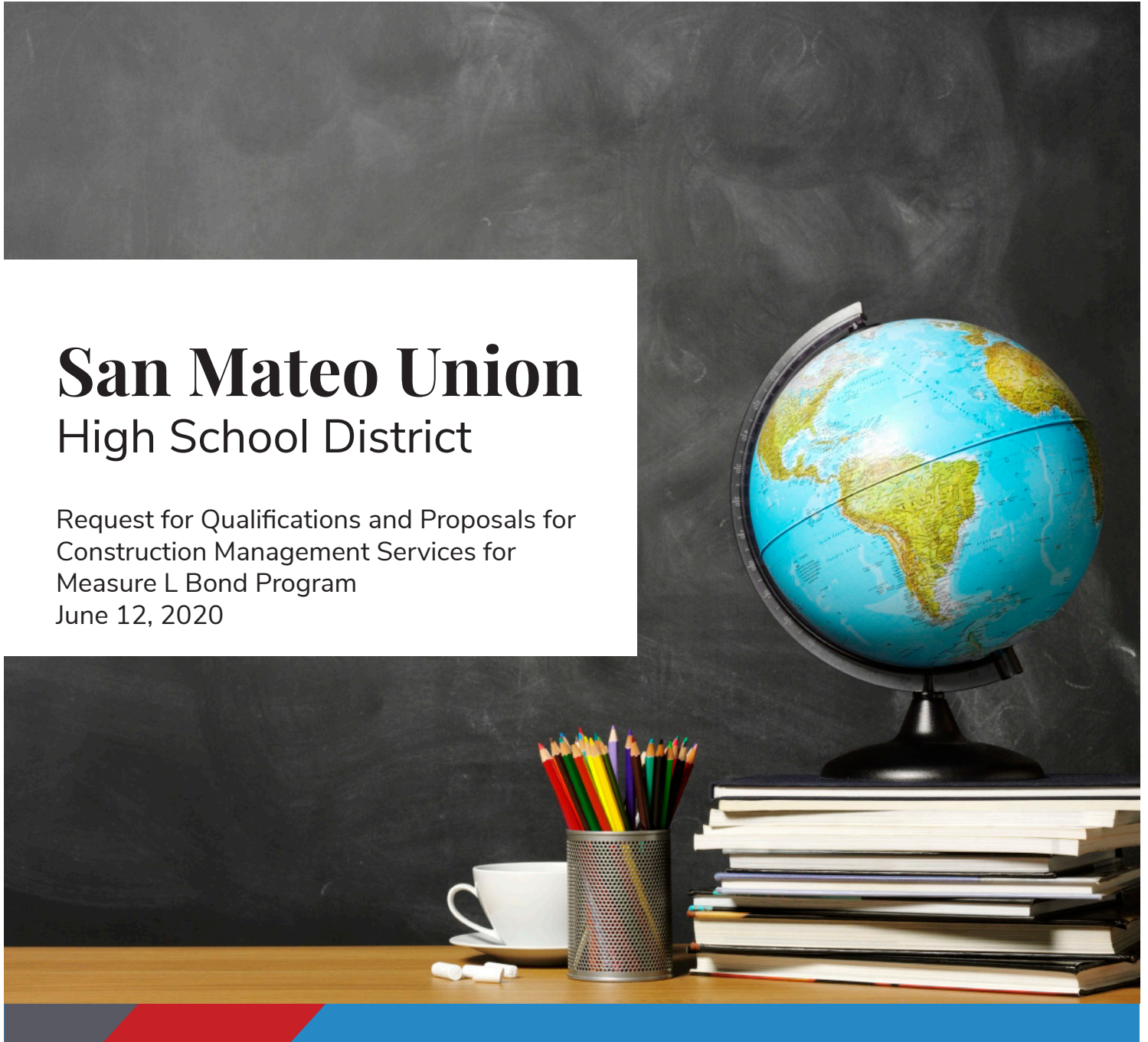


San Mateo Union High School District

Request for Qualifications and Proposals for
Construction Management Services for
Measure L Bond Program
June 12, 2020



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Section

1



Submittal Letter

June 12, 2020

Linda Carlton
Director of Maintenance, Operations and Facilities Use
San Mateo Union High School District
Email address: lcarterton@smuhds.org

**Re: Request for Qualifications and Proposals for
Construction Management Services for Measure L Bond Program**

Dear Ms. Carlton:

Proposal Title: Request for
Qualifications and Proposals for
Construction Management Services for
Measure L Bond Program
Due Date: June 12, 2020
Name: Cumming Management Group,
Inc.
Address: 475 Sansome Street, Suite
700, San Francisco, CA 94111
Fax Number: 415.748.3090
Telephone Number: 415.748.3080
Website: ccorpusa.com

Cumming Management Group, Inc. (Cumming) is pleased to submit our statement of qualifications and proposal in response to San Mateo Union High School District's (District) RFQ/P for construction management services for the Measure L Bond Program. Cumming has provided construction management and related services for over 2,500 school district projects throughout California. Based on this industry leading experience, as well as the quality of our staff, dedication to K-12 education in California, and recognized success, we are positioned to offer the District best-in-class, project management services that will ensure the success of your projects.

Cumming has experienced local resources at our San Francisco office that will provide the District with the necessary skill sets and flexibility to lead your projects. Our proposed team has extensive experience working on new and existing high school campuses and similar K-12 projects. The Cumming team is uniquely qualified and well-positioned to provide you with expert knowledge and team members to meet the needs of this extensive bond program. Cumming brings in our integrated services from across the country to analyze and resolve questions for a value based decision making process.

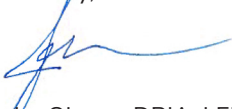
Specifically, our team brings the following differentiators:

- **Extensive Education Experience** — Cumming has successfully provided program, project, and construction management support for more than 2,500 new construction projects throughout California since our founding in 1996. Time and again, we have successfully supported numerous K-12 school districts in Northern California. With this experience, we are well-versed in responding quickly to owners' needs and are efficient and practiced in allocating our best available resources.
- **Local Experience in the Greater Bay Area** — Our San Francisco office team has worked in the Bay Area area for over 20 years. We understand the District requirements for planning, permitting and construction and have deep relationships with many local General Contractors and subcontractors; as well as Architects and Engineers. Our local experience includes building new, as well as repurposing and renovation of classrooms, gyms, performing arts centers, cafeterias, libraries, recreation and community centers, sports fields, fire departments, corporate offices, administration buildings, and more. We have provided building modernization and upgrades successfully and have deep experience in IT upgrades, security upgrades and energy efficiency life cycle cost analysis.
- **Talented and Committed Team** — A partnership with Cumming for your projects will provide the District with a talented team of professionals who possess both individual and collective experience working with California school districts. We have selected our best team members for the District, each of them experts in their proposed roles and well-trained in forming cooperative partnerships across the life cycle of the project. In addition to our key personnel, your program will have the support of a team of in-house professionals and key leadership. Our team brings extensive educational facility construction management expertise, local knowledge, local bond management expertise, state-of-the-art management tools, and strong relationships with the Division of the State Architect (DSA), the Department of Education (CDE), and the Office of Public School Construction (OPSC). We have partnered with InnoActive to provide the best and deepest talent pool for your bond program.

As the Senior Director, I am an authorized officer of the firm and may speak on its behalf throughout the evaluation process. As such, by virtue of this submission, Cumming declares that all information provided is true and correct. Should you have any questions, or need additional information, please don't hesitate to contact me directly at (408) 540-4708 or via email at jolsson@ccorpUSA.com.

We thank you for this opportunity to submit our qualifications for your program.

Sincerely,



John Olsson, DBIA, LEED AP
Senior Director

Section

2



DVBE Requirements

Section 2

DVBE Requirements

Describe DVBE contract capabilities and ability to meet any State requirement related to DVBE.

Commitment to Historically Disadvantaged Businesses

Cumming has always been committed to partnering with women, minority, and service disabled veteran-owned businesses whenever possible. We started out as a small company with less than five employees, and we are keenly attuned to the challenges associated with succeeding in the construction industry. Not only do we regularly partner with WBE, MBE, and DVBE firms, as well as other historically under-utilized or disadvantaged businesses, but we work to embed them deeply into our teams, where we can train, mentor, and learn from them. Below, we provide examples of the efforts we regularly make to increase the amount of business we do with such businesses, and to contribute to their growth and success in this challenging industry.

Education of Team Members and WBE/MBE/DVBE Outreach

Cumming team members are highly accustomed to teaming with historically under-utilized and disadvantaged firms—it is something we have done many times on many different projects in locations around the country. The teaming process typically includes educating our internal project team on how to properly meet or exceed our clients' expectations and goals, while also delivering value and growth to our WBE/MBE/DVBE partner(s). It also includes a significant outreach component, which we undertake by utilizing relevant WBE/MBE/DVBE databases, industry associations, referrals, and existing professional relationships to identify eligible and qualified firms; soliciting those firms directly to see if they are interested in teaming; posting advertisements in local trade publications seeking qualified WBE/MBE/DVBE firms; establishing a fair working arrangement with selected firms that meets the participation goals of the project; and providing mentoring and training to our WBE/MBE/DVBE sub-consultants as needed in order to ensure they are providing high quality services.

Mentoring

Cumming has been regularly utilizing WBE/MBE/DVBE firms on various projects for nearly our entire 20-year history. During this time, mentoring these sub-consultants has been a standard part of our teaming arrangements. This mentoring has proven valuable for our partners, as well, many of whom have shown consistent growth and improvement over the years. One powerful testament to the effectiveness of our mentoring is that our WBE/MBE/DVBE sub-consultants are eager to team with us whenever an opportunity arises. Specifically, our mentoring has included:

- Lessons-learned training for the following topics:
 - SWPP Training
 - Scheduling Revealed
 - Claims Avoidance
 - Cost Management
- Inviting our WBE/MBE/DVBE sub-consultants to company team-building events
- Financial support to WBE/MBE/DVBE firms with periodic cash flow constraints
- Continuous, open communication between Cumming and our WBE/MBE/DVBE partners, even when we are not working together on a project

The following is a testimonial that best describe the strength and support Cumming offers our WBE/MBE/DVBE partners:

“Cumming strives to establish strong business relationships with DBE firms such as Paragon. Our business affiliation is now in its eighth year and we are in gratitude for their continued support and commitment in this regard. We appreciate the time they spent reviewing our business goals and recommending strategies for achieving them. Their advice has been crucial to our business development and gave us a new perspective on available opportunities that helped us grow on other public agency construction programs. A firm such as Cumming is hard to find in the business world where competition is always fierce. It is fortunate for us to have found a great business mentor that is very professional, efficient, and true to its word.”

— Ethel Walker,
Paragon Engineering & Management

Section

3



Description of Firm

Section 3

Description of Firm

Describe the history of the firm, number of years in business, the date the firm was established under its business name, number of employees (licensed professionals and technical support), and the location of the office where the services will be performed. State the dollar value of K-12 facilities projects done in the past calendar year (January, 2019 to December, 2019).

Include a statement of the overall scope of work anticipated in the next year? In the next two years?

Brief Description and History of the Firm

Cumming was founded in 1996 as a firm specializing in providing project owners with program, project, construction, and cost management services. We are a privately-held California corporation with over 900 employees in 35 offices worldwide, including three in the Bay Area, where we have over 40 project management professionals. We are an industry leader in construction and cost management, owner's representation, as well as planning and scheduling. In fact, we are recognized and ranked as one of the very best program/construction management firms in the nation—all while maintaining our independence and individualized level of service. This allows us to focus on what we do best: deliver top-notch projects aligning with program, on schedule and within budget, to the lasting satisfaction of our clients.

900+

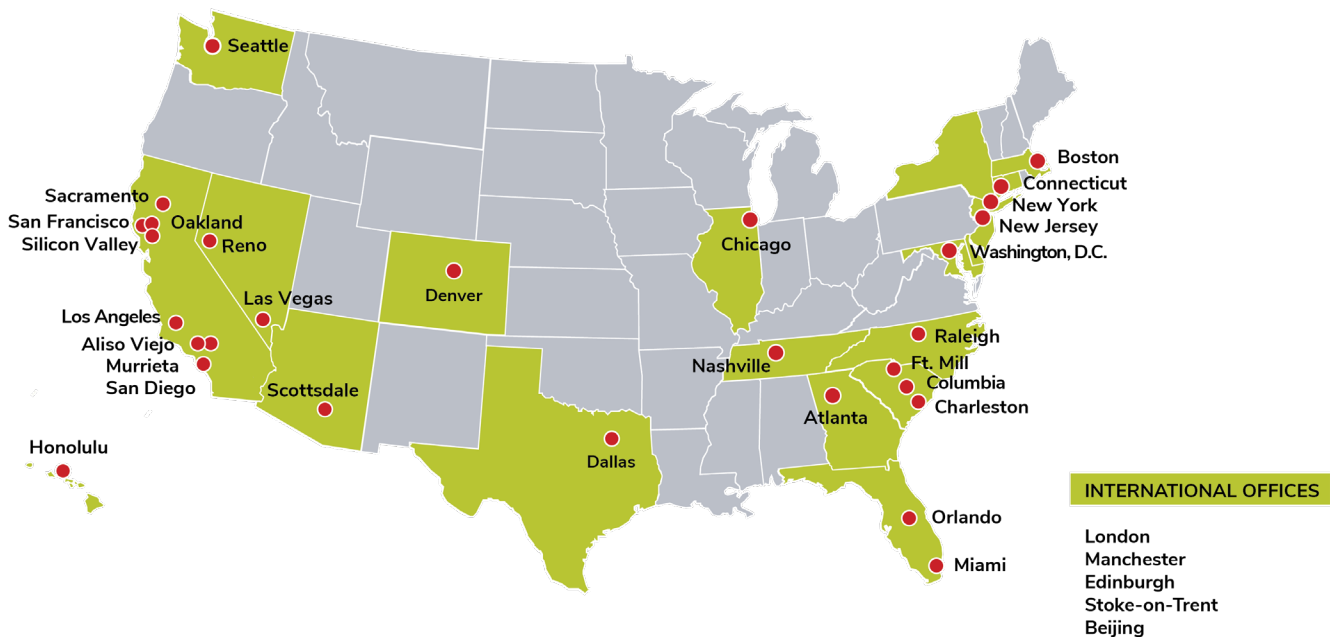
Team Members

40+

Bay Project
Management
Professionals

\$20B

Education Portfolio



Cumming has provided full-scope, beginning-to-end construction management for hundreds of California public agency projects in the past five years alone, during which time we have honed our approach to providing top-notch services, including everything from comprehensive project, program, and construction management to cost management/estimating, scheduling, energy consulting, dispute resolution and avoidance services, and more. Our approach to providing services is based on the idea that we work for you: *everything we do is on your behalf and in your best interest*. In this way, we can ensure San Mateo Union High School District is getting the maximum value for the District bond money, and that the District will be satisfied with their projects for many years to come.

Date Firm Established: July 1, 1996

Number of Employees:

Project / Construction Management:

422 firmwide; 36 in San Francisco & Sunnyvale

Cost Management:

156 firmwide; 27 in San Francisco

Schedulers and Dispute Resolution & Avoidance:

29 firmwide; 3 in San Francisco & Sunnyvale

Administrative & Other:

135 firmwide; 5 in San Francisco

Location of the Office(s) where the services will be performed:

Cumming's proposes to utilize our San Francisco and Sunnyvale offices to provide services for the San Mateo Union High School District.

475 Sansome Street, Suite 700
San Francisco, CA 94111

530 Lakeside Drive, Suite 140
Sunnyvale, CA 94085

Dollar value of K-12 facilities:

In Northern California, we have completed over \$60,000,000 in construction value during 2019.

Cumming's anticipated overall scope of work for the next year is \$30,000,000; and \$40,000,000 for the next two years.

Our Southern California office manages hundreds of millions of dollars of K-12 work annually.

Section

4



Project Team

Section 4

Project Team

Identify key team members, including sub-consultants, and state their qualifications relevant to the services requested in this RFQ/P, including those key team members who will be providing services on a day-to-day basis. Also provide a resume of each key team member. Each proposal must include evidence that the firm is legally permitted and properly licensed for the scope of services requested in this RFQ/P and is and to conduct business in the State of California.

The key personnel identified below are all experts in their roles. We understand that a team with expertise working with the Architect, State Department of Education, Division of the State Architect, and the Office of Public School is an ideal match for the District. As such, we have included a team that has experience and the knowledge needed to support these government agencies.

With our consistent and reliable history of delivering projects on time and within budget, we pride ourselves on our high level of repeat business, particularly within the K-12 education sector and working day-to-day with school district project staff and other stakeholders.

We have summarized our proposed team's qualifications below. Resumes are located in Appendix A. The type of work to be performed by the proposed team is described below.

Team

John Olsson — Project Executive

John Olsson has successfully managed and built multiple school projects for many districts over the last 20 plus years. John's methods of managing the design process, from initial designs through construction completion and close-out, are refined through constant review of lessons learned and implementation of best practices. John's projects are constructed and managed to achieve on time schedule completions and projects built within budget.

For SMUHSD's projects, John will ensure the overall delivery of the Cumming project team. He will be heavily involved in the initiation stages of the project and will support the project team in the completion of their duties.

Teri Mathers — Senior Project Manager – District's Single Point of Contact

Teri will serve as the District's Single Point of Contact. She will be responsible for managing the programming, design, bidding and construction management of the projects. She will provide day-to-day support to the District and oversee progress on the ground, working on site each day to ensure that construction is meeting all QA/QC standards. As an architect with over twenty-five years of experience in construction management, she provides an invaluable interface between the District, the A/E team and the contractor. The early involvement is a forward-thinking approach to achieve on time, on budget, within scope projects.

William Gong — Senior Project Manager

William will serve as senior project manager and will work closely with the project team to successfully complete the assigned projects for the Measure L Bond Program. His background coupled with his in-depth knowledge of public/civic construction for education projects will benefit the team throughout the construction process.

Michael Guardamagni — Senior Project Manager

Michael will coordinate with the Design Team, Contractor, other consultants and the District's Project and Operation teams. On each assigned project, he will review project documents, assist with the project team meetings, ensure QA/QC and issue project reports.

Hunter Tasseff — Project Manager

Hunter will coordinate with the Design Team, Contractor, other consultants and the District's Project and Operation teams. On each assigned project, he will review project documents, assist with the project team meetings, ensure QA/QC and issue project reports.

Harry Finnerty — Project Engineer

Harry will work closely with the project team to assist with RFI submittals, schedules, and change orders. He will work on or assist with project schedule analysis and will work with contractors to assure the work is done properly and on time.

As-Needed Personnel

Vaughan Clarke — Associate Director, Cost

Vaughan will continue to be responsible for preparing cost estimates for both renovation and expansion projects. His responsibilities include leading teams through quantity analysis, specification review, obtaining price quotes, estimate reconciliation and coordinating and incorporating estimates from various project trades. He will work closely with the project team during all phases of the project to ensure accurate budgets and project costs are both established and maintained.

Christine Marez — Energy and Sustainability

Christine will provide leadership for any energy and sustainability strategies and initiatives for the Measure L Bond Program. She will work closely with the project team on an as-needed basis. Christine has over 30 years of experience managing large capital construction programs and 11 years of experience in electric utility design and construction.

Matt Grinstead — Scheduling

Matt will ensure that all schedule assignments are being met and provide oversight into the formulation and development of the schedules and quality control of the scheduling product. Matt can also assist with budget phasing schedules.

Resumes for key team members are located in Appendix A.

Evidence that Cumming is Legally Permitted to Conduct Business

Cumming is a California-based Corporation that is authorized to conduct business in the State of California. Please see our Certificate of Status issued by the Secretary of State on the next page, followed by our City and County of San Francisco Business Registration Certificate.

State of California
Secretary of State

CERTIFICATE OF STATUS

ENTITY NAME:

CUMMING MANAGEMENT GROUP, INC.

FILE NUMBER: C2976512
FORMATION DATE: 04/04/2007
TYPE: DOMESTIC CORPORATION
JURISDICTION: CALIFORNIA
STATUS: ACTIVE (GOOD STANDING)

I, ALEX PADILLA, Secretary of State of the State of California,
hereby certify:

The records of this office indicate the entity is authorized to
exercise all of its powers, rights and privileges in the State of
California.

No information is available from this office regarding the financial
condition, business activities or practices of the entity.



IN WITNESS WHEREOF, I execute this certificate
and affix the Great Seal of the State of
California this day of November 04, 2019.

ALEX PADILLA
Secretary of State

BUSINESS REGISTRATION CERTIFICATE		RENEW BY DATE 05-31-2020	EXPIRATION DATE 06-30-2020
FY 2019-20	BUSINESS ACCOUNT NUMBER 0428918	LOCATION ID 1192859-06-181	
	TRADE NAME (DBA) CUMMING CONSTRUCTION MANAGEMEN	BUSINESS LOCATION 475 SANSOME ST STE 700	
	BUSINESS CUMMING CONSTRCTN MGNT INC	THIRD PARTY TAX COLLECTOR <input type="checkbox"/> PARKING TAX <input type="checkbox"/> TRANSIENT OCCUPANCY TAX	
CUMMING CONSTRCTN MGNT INC 25220 HANCOCK AVE 440 STE MURRIETA CA 92562		CITY AND COUNTY OF SAN FRANCISCO OFFICE OF THE TREASURER & TAX COLLECTOR José Cisneros Treasurer David Augustine Tax Collector	

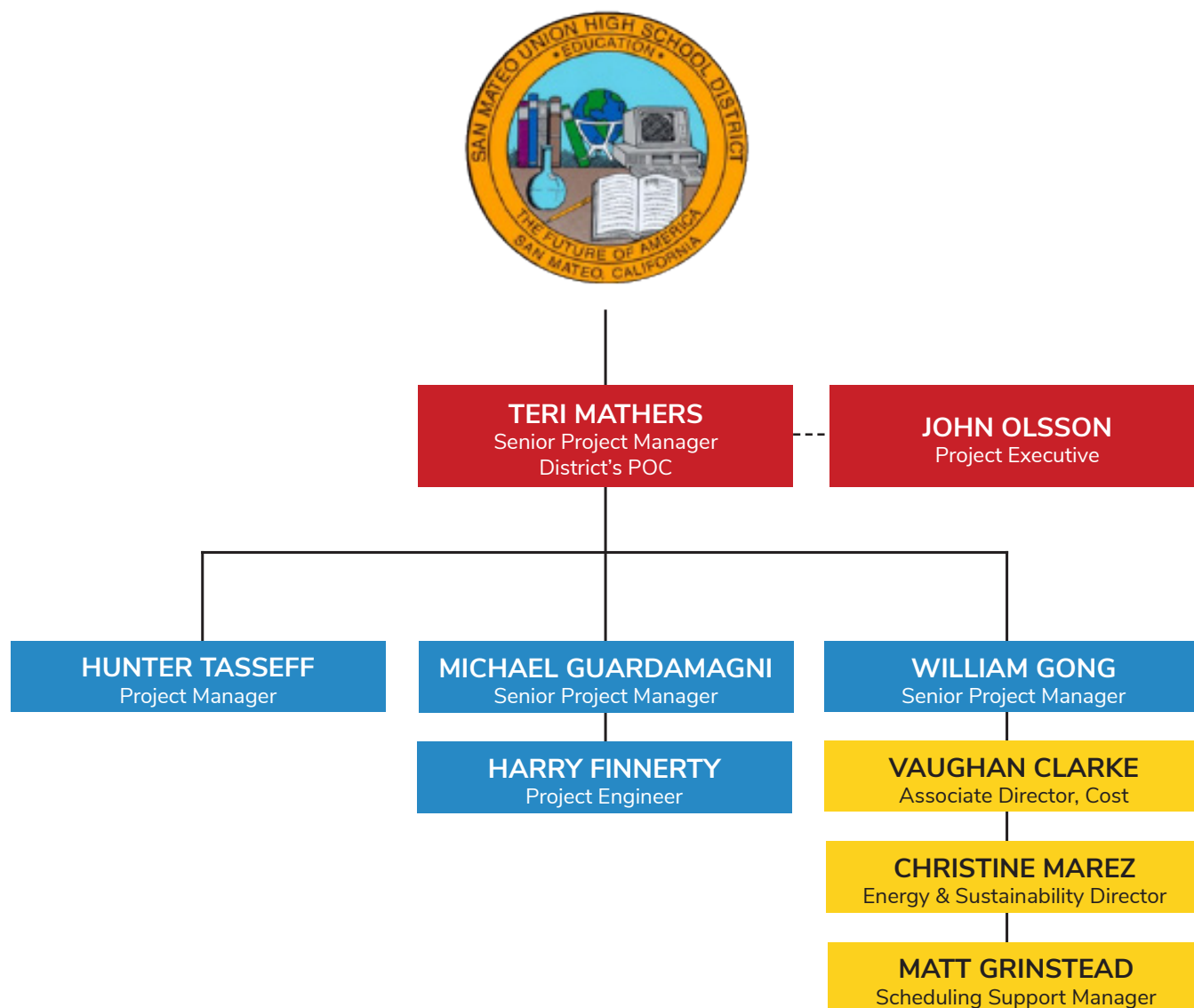
POST CLEARLY VISIBLE AT THIS BUSINESS LOCATION

Read reverse side. To update addresses or to close a business, go to www.sftreasurer.org/accountupdate.

Organization Chart

We have included an organizational chart below that demonstrates the structure of our team for the District's projects. Additional resources are available as-needed.

Resumes for our proposed team are located in Appendix A.



Section

5



Knowledge of K-12
Facilities Design and
Construction and
other Related Public
Education Facilities
Experience

Section 5

Knowledge of K-12 Facilities Design and Construction

Provide information about prior construction management services furnished by your firm in the last ten (10) years on a minimum of five (5) K-12 educational projects, including whether projects were closed out with DSA successfully...

Our education portfolio includes extensive expertise with K-12 school district bond programs, California community colleges, and higher education. Cumming has managed projects and programs from start to finish for numerous California K-12 clients, including Sequoia Union School District, Oakland Unified School District, Castro Valley Unified School District, Pajaro Valley Unified School District, San Rafael City Schools, Glendale Unified School District, Weaver Union School District, Los Angeles Unified School District, and many more.

Much of this work has centered on multi-year bond programs that featured numerous education renovation projects; extensive interaction with various district, city, county, and state agencies; and compliance with a variety of applicable codes and regulations.

Please see the following pages for relevant project experience.

For all projects where your firm has provided construction management services over the past ten (10) years, explain the reasons projects, if any, were not closed out with DSA successfully.

Cumming's projects have all been closed out successfully with the DSA. We feel this is a critical aspect of our services.

Firms are also required to provide written responses to questions and information requested in Exhibit D, attached hereto.

Exhibit D - Requested Information and Questions

1. Describe your firm's claim history. Has your firm ever been named in a claim?

Cumming has been involved in one claim in the State of California in the past five years, which has been settled. All other claims Cumming has been involved in over the past five years have occurred in South Carolina (SC) where we often perform CM Multi-Prime delivery services and are named by contractors alongside the Owner. We have provided a summary of our litigation history in Section 9.

No pending or unsettled litigation threatens our financial condition. Cumming has never failed to complete a project, and no project we have ever worked on has been negatively impacted by any issue related to the firm's financial stability.

2. Describe one particularly challenging construction project and the steps that your firm took to ensure its success.

Cumming was requested to assist a District when it became apparent that their new High School Campus was falling far behind schedule and change order costs were going through the roof. There was strong disagreement and acrimony between the Architect, Contractor and District. We spent a month reviewing the situation and talking to all parties involved in the project. The IOR gave us the most objective information about the project and how it had degraded to this extent. To bring the parties together and increase communication and collaboration, Cumming brought a Project Manager to the project to act as the project advocate and assist all team members. She quickly immersed herself into the daily activities of the project and developed trust and respect with the site Management/Supervision and workers. She became a collaborative conduit from the jobsite office to the field and to the architect and District. She pushed information and expedited decisions between the architect, Contractor and District, while decreasing the animosity of the three parties. She was a project advocate and it became clear that her actions were for the benefit of the project and district. We worked on outstanding issues diligently. Change Orders were processed and negotiated fairly. The schedules continued to slip, so we worked with the contractor to produce more complete and realistic short-term work schedules. Procurement was slow and behind and there was a shortage of qualified workers. We worked with the contractor to find ways to augment workers and to work overtime to keep the slippage from getting worse. As we were augmented staff to the project team, we were able to achieve getting the school opened on schedule. The District Associate Superintendent said we were worth our weight in gold!

3. What steps does your firm take to ensure accountability to the Board of Trustees and the Prop 39 Citizens Oversight Committee?

We will provide monthly reports as required including project progress including funding and closeout progress. We will meet with the Board and Oversight Committee as required to explain and inform them of the progress of the work in terms that they understand. All information will be vetted for accuracy. As issues arise, we will be direct and straight forward in our communication with the Board and Oversight Committee. We will offer solutions and best value options throughout the bond program.

4. Describe your firm's process for analyzing potential change orders to ensure the owner is getting a fair deal.

Project managers' review individual change order requests for merit. This includes reviewing contract documents, field conditions and discussions with the A/E team. After determining merit of request, the actual costs are reviewed for validity. If the change order cannot be quickly resolved, we can bring in our cost managers as an independent third party to review and analyze the change to propose a fair price for the District. We are doing this successfully on many of our programs and projects.

5. Describe your firm's fee schedule. Does your fee adjust based on the value of the construction contract? Does this include change orders to the construction contract?

Cumming prefers to work on a T&M basis. However, we are happy to negotiate a lump sum if required by the District. We will develop our fee and GMP in a very open book fashion. We will base our staff requirements on the schedule and scope effort requirements of the work. Our fee is based on the project schedule and our needed scope of services at any given time over the life of the project. Our projected fees are reviewed with the District. This will be the basis of negotiation with the District for a final fee. We prefer to not utilize a percentage of construction fee but can do so if required.

6. A project is delayed as the result of unforeseen conditions. The project duration increases from 12 to 18 months. How does this duration increase impact your fees?

If the delay is due to unforeseen conditions and the schedule is extended, it would affect our fee. We would review our staff requirements and split time with other projects as the workload required. We prefer to get involved in projects early to reduce unforeseen conditions. During pre-construction, we will complete investigations, such as potholing and material testing, to avoid as many unforeseen conditions as possible. If the project is delayed, we will work with the District to adjust our fees accordingly to balance the extended time and scope of work.

7. Has your firm ever contributed financially to offset the impact of an oversight in providing construction management services for a project? If yes, explain the oversight.

No, we have not had to do this.

8. An issue arises on a project that is years beyond warranty. How do you handle the issue?

We will work the district to provide due diligence to determine the issue and find a solution. This will involve reviewing District records, investigating for latent defects, and researching the issue. We will assist the District in reaching out to the Contractors and manufacturers to arrive at an appropriate resolution.

9. Describe how your firm prepares cost estimates. How many estimates do you provide during the design process and what are the reasons your firm would provide multiple estimates?

Cumming has over forty cost managers in the Bay Area. With the hundreds of projects a year that we have worked with local architects and school districts, we have a vast up-to-date data base. We are able to provide estimates at appropriate times in the design process. This will allow the district to make design decisions prior to bidding during the design phases. Typically, we would provide estimates at schematic, design development and several times during construction documents. With the estimating during design, we can assist the architect in keeping the design and detailing of the project within the budget. Historically, the Cumming estimates have aligned with the bids.

10. A bid comes in well above the approved budget. What steps do you take?

If a bid comes in well over budget, we meet with the Contractor to see what the drivers of the higher bid were and discuss value engineering alternatives to bring the bid closer to the budget. When we start in pre-construction, we work closely with the A/E team to ensure that the projects are designed within budget. This involves a check and balance of estimating, value engineering and constructability reviews. After bidding, we would work the A/E teams, the contractor and their sub-contractors to review the pricing that has come in unexpectedly high. This allows us to target the big-ticket items first. The goal of value engineering is to modify the detailing to reduce cost rather than to eliminate scope. We find that working in partnership with the team we are able to bring the project in budget successfully.

11. The District receives a bid protest. What steps do you take?

We first meet with the protesting Contractor to understand the protest and see if we can resolve it at an early stage. If this does not work, we follow the contract, bid documents, and follow the public contract law. We will work closely with the District in the bidding process to reduce the likelihood of a protest. When one occurs, we will review the protest and make a recommendation to the Board of Trustees.

12. How does your firm handle registering projects with the California Department of Industrial Relations?

Cumming has staff that is available to register the projects as required.

13. Legal Counsel recommends that a bid protest be waived as a minor irregularity. The contractor disagrees and requests the opportunity to address the Board of Trustees. How do you respond?

Per contract law, we would arrange for the contractor to be heard by the Board of Trustees. We will provide a summary recommendation for the Board of Trustees and would be available to discuss our recommendations. The Board can use the Legal Counsel's recommendation to reject the protest at that time.

14. What is your firm's fee schedule for additional services?

Discipline	Hourly Rate
Project Management	
Senior Director	\$215.00
Senior Project Manager	\$190.00
Project Manager	\$175.00
Constructability Manager	\$170.00
Assistant Project Manager	\$145.00
Project Engineer	\$115.00
Administration / Clerk	\$70.00
Senior Scheduler	\$190.00
Cost Management	
Managing Director / Director / Regional Director	\$215.00
Senior Cost Manager	\$180.00
Cost Manager	\$165.00
Assistant Cost Manager / Estimating Technician / Intern	\$115.00
Energy and Sustainability Services	
Managing Principal	\$205.00
Project Director	\$185.00
Senior Project Manager	\$175.00
Project Engineer	\$175.00
Project Manager	\$155.00
Assistant Project Manager	\$135.00
Project Coordinator	\$110.00

*The rates above are good through December 2021. Rates will be adjusted January 1, 2022.

15. Describe how your firm prepares schedules. How frequently are they updated?

Cumming has a team of in-house schedulers that will work with the PM team to create master schedules, design schedules, projects schedules and construction look ahead schedules as necessary. We will utilize input from the District, design team and contractor to ensure that the appropriate information is captured in the schedule. The schedules will be updated monthly for the larger schedules and the look aheads are updated weekly.

16. Describe how your firm analyzes a contractor's Schedule of Values?

We will analyze the schedule of value to ensure that it:

- a) meets the contract requirements,
- b) is comprehensively detailed and
- c) is easy to review

We will analyze the schedule of values to make sure it matches the scope of work for that line item. It is important to have the schedule of values detailed enough to be able to easily verify work is completed. For instance, separate submittals, material, labor, designate by building, floor or zone.

17. A summer modernization project requires complete removal of furnishings. What is your process?

Prior to beginning the process, we need to meet with the individuals that will be affected to determine actual scope. We need to know which furnishing and materials will be needed to accessed during the summer and which will not. Designate a location for items to be stored. Write a request for proposal and go out to bid following the District and state guidelines. Obtain and analyze bids. Provide a recommendation to the District for the bids. Obtain Board of Trustee approval. Award bidder. This award should include the move out, move in and disposal of any unwanted furnishings.

18. While kicking off a project, you discover there are past projects on the site that are not closed out with DSA. What is your process?

We will meet with DSA prior to starting a project to determine which projects, if any, are not closed out. We will then determine requirements of closeout with DSA. We will then analyze, and compile information required to be returned to DSA for closeout. We will work diligently with DSA to get them information and backup they require in a timely manner. In the past, we have been able to successfully negotiate closeout and continue with permitting to keep projects going.

19. Describe how your firm addresses “Owner Furnished” materials.

During the design phase, we want to ensure that the Owner furnished items are clearly designated in the drawings and specifications. This will include any utilities or other support required. Once the contract is awarded to the GC, we will work with them to include in the schedule when the items are needed for installation. This will allow us to determine the appropriate lead time for purchasing to not impact the schedule.

20. The District’s recently completed Performing Arts Center is hosting a dance competition and the sewer backs up. It is 10:30 on a Friday night and the 600 participants are due back at 8:00 Saturday morning. What steps do you take to address the problem?

As soon as notified, we will contact the contractor to respond ASAP to review the situation and provide an immediate solution for the sewer backup. If the solution is temporary, we would continue to work on a permanent solution, while keeping the facility operational. and as required by the contract, we contact the contractor. In addition, we will work with the District operations and maintenance and GC’s plumber to resolve the issue immediately. Depending on the problem, a temporary solution, port-a-potties, may be necessary. We would work to get these on site.

21. The Principal of San Mateo High School calls indicating that OSHA is on site responding to teacher complaints about the odor from an ongoing roofing operation. What do you do?

We would immediately go to the site and discuss the issue with the Principal and OSHA. We would work on options to resolve the odor problem and shut down the roofing, if required. Prior to the odor becoming an issue, we would schedule the roofing during a time that District staff is not on site. If this is not possible, we would look at appropriate locating the material downwind from adjacent structures. In addition, we have added vanilla to the roofing material to reduce the offensive smell. We would be providing appropriate notification to the school of the activities that would be taking place.

22. An HVAC project comes in significantly over budget. Upon further investigation you find out the District’s proprietary controls system was bid at double the budget. What steps do you take?

During design, we will review the budget for controls with our expert control estimators. This is an area that is often under budgeted due to specific needs and requirements. We will adjust the budget accordingly after discussion with the District. Prior to bidding, we will review the requirements for the proprietary controls, the specifications and any pre-existing bidding that determined base pricing. After completing a thorough review of the bid, we will meet with the mechanical engineer, District operations and maintenance, sub-contractor, contractor and GC to review the bid and determine the reason for high bid. It may be as simple as a difference in points. We will work closely as a team to come to a resolution to this issue.

23. You have requested a “Recovery Schedule” for a project that may not be ready for the start of school. What steps do you take to analyze it?

First, we will analyze the critical path of the project. We will look at how they are recovering. Are they adding manpower? Working on Saturday/Sunday? Material expediting? Is the schedule reasonable and obtainable? Recently we had a similar situation where we work closely with the contractor to determine which activities were impacting the start of school and strategized ways to resequence work and expedite other activities to make sure the school can be opened in time. Prior to needing a recovery schedule, we monitor the schedule on a weekly basis to ensure this situation does not occur.

24. The Project Architect continues to specify products that are well outside the budget. How do you respond?

We want to ensure that the Architect’s understand the goals of the projects. This includes the budget and overall quality of the project. We will discuss with the Project Architect why they are specifying project that are mis-aligning the budget. If the Architect is utilizing the District standards, we will analyze and re-evaluate the standards with the District to ensure alignment with the budget. If not, we will work them to align the budget and quality of the project. We would also make it clear to the Architect that if the project goes over budget significantly, they would have to redesign the project to bring it into budget for free.

25. There is a major conflict between the contractor and the Project Inspector that is impacting the project. How do you intervene?

We would immediately meet with the IOR and Contractor to discuss the issues that are causing the conflict. We would work together to create a clear understanding of project and contract requirements, as well as defining project goals and expectations. Working as a collaborative team, major conflicts are less likely to occur. It will be important to listen to both sides of the issue, review the situation and work closely to get the group re-aligned to move the project forward. This needs to be done quickly to not affect the critical path and overall schedule.

26. Describe how your firm conducts a Constructability Reviews”.

We will work with the A/E team during design to provide periodic reviews at certain milestones throughout the design process, to complete constructability reviews. Cumming has in-house Constructability experts, which include MEP and Civil experts to assist with the review with our Project Management Team. We will work through the drawings in a page turn to review the drawings thoroughly based on vast experience of the team. We do not wait until the end but will complete reviews along the way to ensure the appropriate detailing is completed and continues to align with the budget.

27. A project has bid twice and come in well over budget both times. What are your next steps?

When a project bids twice and is over budget, it is difficult to rebid without a total rescope and realignment. We will meet with the low bid GC to determine the cause for the bid. We can have our cost managers review the bid and drawings to determine if the bid is aligned. After completing this review, we will meet with the A/E team and the District to discuss the findings. The overbid can range from several factors. We will want to determine the likely cause and realign the project appropriately to meet the budget and goals of the project.



District Name, Contact Name, Email and Telephone Number	Project Name and Location Dates of Services	Description of Facility	Budgeted Construction Cost and Actual Construction Cost	Firm Role and Project Team
<p>School District San Rafael City Schools</p> <p>Name Daniel Zaich, Director of Strategic Initiatives</p> <p>Email dzaich@srcs.org</p> <p>Telephone 415-847-9063</p>	<p>Project Name San Pedro Elementary School</p> <p>Location San Rafael, CA</p> <p>Start July 2018</p> <p>Completion January 2020</p>	<p>Description Cumming is providing construction management for new build and renovation projects related to the Measure A and B bond programs, which have a total budget of \$120 million. Example assignments include construction management for three brand-new, ground up school additions that include classrooms, lab rooms, multipurpose buildings, and administration buildings. These three school sites combined cover more than three acres of land improvement and cost more than \$30 million in construction. Additionally, we are supporting the client with their sustainability initiative goals. This includes managing the different grants and rebates that are available as funding sources for these goals.</p> <p>Relevance Provide two new single-story classroom buildings for five new kindergarten classrooms including a transitional kindergarten, one preschool classroom. Provide a new administration building for offices and student support spaces. Remodel existing classroom and administration building to provide upgraded and new classrooms along with additional student support spaces. Upgrade field, playground and parking lots including installation of EV chargers and solar panels.</p>	<p>Budget and Actual Original Budget: Unknown</p> <p>Bid Amount: \$14.6 million</p> <p>Final DSA Amount: \$14.6 million</p> <p># of RFIs and Change Orders 232 RFIs 2 COs</p>	<p>Firm Role Construction Manager</p> <p>Key Team Members William Gong, Senior Project Manager; Hunter Tasseff, Project Manager; John Olsson, Project Director</p>
<p>School District San Rafael City Schools</p> <p>Name Daniel Zaich, Director of Strategic Initiatives</p> <p>Email dzaich@srcs.org</p> <p>Telephone 415-847-9063</p>	<p>Project Name Laurel Dell Elementary School</p> <p>Location San Rafael, CA</p> <p>Start August 2018</p> <p>Completion May 2020</p>	<p>Description See above</p> <p>Relevance Eight new 21st century classrooms with state-of-the-art instructional technology, adjacent collaborative spaces, a multi-purpose room, office & student support spaces, and extended learning spaces are being constructed to replace inadequate space and bring the Laurel Dell school up to current educational standards. Renovate existing multi-purpose and classroom space to accommodate classrooms, library and media center. Provide outdoor learning courtyard for outside learning opportunities. Install new turf area adjacent to playground.</p>	<p>Budget and Actual Original Budget: Unknown</p> <p>Bid Amount: \$14 million</p> <p>Final DSA Amount: \$14.3 million</p> <p># of RFIs and Change Orders 238 RFIs 3 Change Orders</p>	<p>Firm Role Construction Manager</p> <p>Key Team Members William Gong, Senior Project Manager; Hunter Tasseff, Project Manager; John Olsson, Project Director</p>



District Name, Contact Name, Email and Telephone Number	Project Name and Location Dates of Services	Description of Facility	Budgeted Construction Cost and Actual Construction Cost	Firm Role and Project Team
<p>School District Oakland Unified School District</p> <p>Name Kenya Chatman, Acting Director of Facilities Planning</p> <p>Email Kenya.chatman@ousd.org</p> <p>Telephone 510-500-5630</p>	<p>Project Name Claremont Field Project</p> <p>Location Oakland, CA</p> <p>Start May 2019</p> <p>Completion November 2019</p>	<p>Description Cumming has been working as Oakland Unified School District's (OUSD) Program and Construction Manager on more than 12 projects ranging from \$1 million to \$65 million. Their Bond Measure J was recently passed for \$475 million dollars. The District has given us their most difficult projects to manage and resolve preexisting issues on, and initial smaller projects have been completed during our year on the project. We have closely with the District, their legal team, and the Board to bring projects back in line with budget and costs. John was considered the Chief Negotiator on the Lease-Leaseback contracts during the contract and negotiation phases. We reviewed and had the elevator specifications changed to save the District more than \$1 million on their new elevators being installed. On an existing major campus project, we found that the contract was written poorly and did not correctly meet new codes. We mitigate these project risks by becoming very knowledgeable about the projects and working collaboratively with the designers, Inspectors of Record, and the District to review planned work and work in place.</p> <p>Relevance Installation of synthetic turf field on an existing asphalt playground. Includes site furnishing and painted asphalt running surface as well as relocation and adjustment of restroom fixtures, accessories, and signage.</p>	<p>Budget and Actual Original Budget: Unknown</p> <p>Bid Amount: \$635,950</p> <p>Final DSA Amount: Anticipated \$1.1 million</p> <p># of RFIs and Change Orders 55 RFIs 12 COs</p>	<p>Firm Role Construction Manager</p> <p>Key Team Members Elena Comrie, Senior Project Manager; John Olsson, Project Director</p>
<p>School District Oakland Unified School District</p> <p>Name Kenya Chatman, Acting Director of Facilities Planning</p> <p>Email Kenya.chatman@ousd.org</p> <p>Telephone 510-500-5630</p>	<p>Project Name The Center (Central Kitchen and Education Center)</p> <p>Location Oakland, CA</p> <p>Start February 2018</p> <p>Completion April 2020</p>	<p>Description See above.</p> <p>Relevance The project involved the construction of a new 40,000 sq. ft. central kitchen for the District. Space includes facilities for receiving, shipping, storage, food preparation, bulk staging, equipment washing, waste treatment, training and education. The center also includes an outdoor kitchen area and a greenhouse to allow for sustainable practices.</p>	<p>Budget and Actual Original Budget: Unknown</p> <p>Bid Amount: \$44.8 million</p> <p>Final DSA Amount: Anticipated \$71 million</p> <p># of RFIs and Change Orders 252 RFIs 37 COs</p>	<p>Firm Role Construction Manager</p> <p>Key Team Members Elena Comrie, Senior Project Manager; John Olsson, Project Director</p>



District Name, Contact Name, Email and Telephone Number	Project Name and Location Dates of Services	Description of Facility	Budgeted Construction Cost and Actual Construction Cost	Firm Role and Project Team
School District South San Francisco Unified School District Name Ted O, Assistant Superintendent of Business Services Email tedo@ssfusd.org Telephone 650-877-8707	Project Name Buri Buri Elementary School Mixed Use Field Location South San Francisco, CA Start September 2019 Completion Anticipated June 2020	Description Cumming performed project management services for multiple schools in South San Francisco Unified School District. The scope of work included campus wide modernization including window replacements at Martin Elementary School and a new missed-use athletic field including track and soccer at Buri Buri Elementary School. Our team also provided project management services for South San Francisco High School for new baseball and softball fields and a new synthetic turf softball field at El Camino High School. The total project is valued at over \$13 million. Relevance Installation of mixed use field on natural turf including infield fines, chain link backstop, dugouts and new perimeter track.	Budget and Actual Original Budget: Unknown Bid Amount: \$1.1 million Final DSA Amount: Anticipated \$1.2 million # of RFIs and Change Orders 5 RFIs 1 CO	Firm Role Construction Manager Key Team Members William Gong, Senior Project Manager; John Olsson, Project Director
School District South San Francisco Unified School District Name Ted O, Assistant Superintendent of Business Services Email tedo@ssfusd.org Telephone 650-877-8707	Project Name Martin Elementary School Modernization Location South San Francisco, CA Start June 2019 Completion Anticipated June 2020	Description See above. Relevance Modernization of existing school including window replacements to the majority of the buildings, new flooring, new HVAC units, new accessible ramps, and new play structure.	Budget and Actual Original Budget: Unknown Bid Amount: \$5.5 million Final DSA Amount: Anticipated \$5.7 million # of RFIs and Change Orders 150 RFIs 4 COs	Firm Role Construction Manager Key Team Members William Gong, Senior Project Manager; John Olsson, Project Director



District Name, Contact Name, Email and Telephone Number	Project Name and Location Dates of Services	Description of Facility	Budgeted Construction Cost and Actual Construction Cost	Firm Role and Project Team
School District South San Francisco Unified School District Name Ted O, Assistant Superintendent of Business Services Email tedo@ssfusd.org Telephone 650-877-8707	Project Name South San Francisco High School - Softball Field and Baseball Field Location South San Francisco, CA Start October 2019 Completion Anticipated July 2020	Description See above. Relevance Installation of softball field on natural turf including infield fines, chain link backstop, perimeter fencing, bullpens, new scoreboard and new drainage system.	Budget and Actual Original Budget: Unknown Bid Amount: \$1.8 million Final DSA Amount: Anticipated \$2.5 million # of RFIs and Change Orders 33 RFIs 3 COs	Firm Role Construction Manager Key Team Members William Gong, Senior Project Manager; John Olsson, Project Director
School District South San Francisco Unified School District Name Ted O, Assistant Superintendent of Business Services Email tedo@ssfusd.org Telephone 650-877-8707	Project Name El Camino High School - Softball Field Location South San Francisco, CA Start November 2019 Completion Anticipated July 2020	Description See above. Relevance Installation of softball field on synthetic turf including infield fines, chain link backstop, perimeter fencing, bullpens, new scoreboard, new drainage system and new ADA ramp.	Budget and Actual Original Budget: Unknown Bid Amount: \$1.8 million Final DSA Amount: Anticipated \$1.9 million # of RFIs and Change Orders 35 RFIs 0 COs at this time	Firm Role Construction Manager Key Team Members William Gong, Senior Project Manager; John Olsson, Project Director



District Name, Contact Name, Email and Telephone Number	Project Name and Location Dates of Services	Description of Facility	Budgeted Construction Cost and Actual Construction Cost	Firm Role and Project Team
<p>School District Sequoia Union High School District</p> <p>Name Louise Pacheco, Project Manager, Construction Department</p> <p>Email lpacheco@seq.org</p> <p>Telephone 650-290-2357</p>	<p>Project Name TIDE Academy</p> <p>Location Menlo Park, CA</p> <p>Start November 2019</p> <p>Completion Anticipated July 2020</p>	<p>Description Cumming is providing on-call project management support, schedule review and assistance to the District in expediting completion to their new 45,000-sq.-ft. high school focusing on technology, innovation, design and engineering. We assisted the district and contractors to take a project that was far behind schedule and worked it so that it opened on time for the first day of school.</p> <p>Relevance On-call project management support, schedule review and assistance to the District in expediting completion to their new 45,000-sq.-ft. high school.</p>	<p>Budget and Actual Original Budget: \$45 million</p> <p>Bid Amount: Unknown</p> <p>Final DSA Amount: Anticipated \$39,175,058</p> <p># of RFIs and Change Orders 1,026 RFIs 8 COs and 274 PCOs</p>	<p>Firm Role Construction Manager</p> <p>Key Team Members Deborah Slivkoff, Senior Project Manager; John Olsson, Project Director</p>

Section

6



Services Required of
Selected Firm

Section 6

Services Required of Selected Firm

Cumming will provide all services required in the RFP which includes project based design-phase services in conjunction with all architectural firms awarded work by the District. We will assist with bidding; manage the construction contracts and “close-out” the projects. We will assist the District in the selection of the most appropriate construction delivery method (design-bid-build; design -build, etc.). More specifically:

- Design Phase—Work with District staff and architects to develop and refine designs to correlate design and scope to project budget; assist with verification of site conditions; perform constructability reviews at appropriate stages of design; assist in segregating bid packages for maximum cost effectiveness; advise District staff regarding owner-supplied equipment and other potential cost-saving measures; report to District staff on the status of design and State and local agency approvals versus the approved schedule; assist in obtaining all necessary approvals; attend meetings as required;
- Pre-Construction & Bidding Phase—each project and assist the District staff and other consultants (architects, engineers, etc.) in the development of the initial budget and budget updates for each project; work with District staff in conducting pre-bid conferences, conduct pre-construction meetings, assist with prequalification and the evaluation of responses, participate in the bidding process and reporting to District staff on bid results, assist in dealing with any bid protests and assist District staff in coordinating contracts with selected low bidders including the evaluation of bonds, insurance, conformance with DIR requirements, DVBE compliance and CEQA compliance;
- Construction Phase—Assist District staff in the administration and coordination of the following aspects of the construction project: monitor the work of contractors on a daily basis; enforce performance, scheduling and notice requirements; monitor schedule and cost information for each contractor for each project; document the progress and cost of each project; report and advise proactively on potential schedule and budget variances and impacts on schedules and budgets; recommend potential solutions to schedule and cost issues; work cooperatively with architects and contractors; attend weekly job site meetings and prepare and circulate weekly job site minutes when required; evaluate and process payment applications; evaluate and process change order requests; evaluate and track requests for information (RFI's) and responses; work with District staff and architect to develop lists of incomplete or unsatisfactory work (punchlists); submit necessary

reports to State authorities including DSA verified reports; ensure that all documents from all parties are submitted to DSA in a timely manner to complete project closeout; and

- Post-Construction Phase—Work with District staff to ensure completion of all punchlist work; coordinate contractor closeout requirements including obtaining all guarantee documents, keys, as-built drawings, daily logs and verified reports; monitor warranty work if requested; coordinate systems training with District staff and contractors and assist in the moving District staff into new/renovated facilities upon project closeout.

Quality Control

Cumming's approach to quality control begins with constructability reviews. We want to learn the building program as quickly as possible and understand the project as well as the design team. The goal of the review is for the District project to have the program required to fulfill their mission and long-term maintenance of the facility. Cumming recommends being involved in critical design meetings with the owner to thoroughly understand the scope of work.

From the outset, we operate within District's communication protocol and conduct visual site inspections to help identify potential impediments to the construction process. In order to minimize change orders and scheduling “busts”, we wear the contractor's hat. In the low bid environment, many contractors bid jobs low believing they will recoup their losses due to errors, omissions, or board and building regulatory conflicts. We understand these strategies and carefully review the “front end” documents, with the technical specifications in order to eliminate conflicts and review the drawings to ensure interdisciplinary coordination. With our on-site review of conditions, knowledge of the drawings and specifications, teamwork with the inspector and A/E team, Cumming will ensure that the contractor provide a quality project.



Experience Working with Diverse Decision-Makers

Cumming has worked for large and small districts. Regardless of the size of the district or size of the projects, the Cumming team became an integral part of the District's staff and communicated daily with the District team members from Superintendents to site custodial staff. We worked closely with the District to analyze the requirements of the District, make recommendations based on cost, schedule, and scope to allow the District to learn and analyze their options. As options were narrowed down, we provided more analysis and recommendations to assist in the final decision making of the District. Our analysis would not be merely focused on the one particular project but would take the District's overall bond and master plan into account, for the best global solutions.

As District's needs are constantly changing, we use the analysis and recommendations as a basis for constant review and improvement. The success of this is dependent on constant communication with the District's team and the A/E teams.

Working with Architects

Cumming is very experienced in working with Architects and Engineers in order to ensure that our clients' projects are designed and built within budget and schedule constraints. We work in a collaborative manner to review the design early and often to ensure that the design meets the District's scope and standards. We include the District team during the review of the design to ensure that the District can maintain the facility once turned over. All this while keeping the designs in line with budgets and schedules.

Cumming is uniquely set up to provide ongoing support to the Architectural teams at all stages of the projects from Schematic Design to Construction Documents. With our in-house experts on cost management, constructability and scheduling, we are experts in keeping designs within budget for our clients.

We can provide assistance to the A/E teams in review and due diligence of existing buildings augmenting and validating the existing conditions. We will work early with the public utilities to get the best information for coordination with the design. Reviewing as-builts and discussions with the facilities and maintenance staff will provide insight to existing conditions. We will take this information and transfer it to the design team as well as use it as a basis for the constructability effort.

Planning and Facilitation Skills

To achieve a successful construction project, in the education environment in particular, Cumming believes it is important to demonstrate strong planning and facilitation skills from the outset. Without strong planning and facilitation skills, it is very difficult, if not impossible, to make solid decisions and achieve successful project outcomes. Our approach to planning and facilitation is based on teamwork, which in turn is built on striving to achieve common goals, clear and honest communications, and fair and equitable issues resolution.

The following is Cumming's approach to leading a team and utilizing a reliable decision-making process based on strong communications:

- Facilitate the establishment of team goals at the beginning of a program;
- Develop a Management and Administrative Plan, outlining the lines of communication, roles and responsibilities and project procedures;
- Conduct coordination meetings during the design phase with stakeholders and weekly meetings during construction with the Contractor and Owner's operations staff to foster coordination and open communications;
- Develop high-level reporting dashboards for "Real-Time" communications; and
- Anticipate issues that could become problems and proactively work to resolve the issues.



Through this approach, it becomes possible to develop a project plan that has the full buy-in of all project stakeholders representing the needs and vision of the client as well as the end-users. Through clear, honest communication and a consistent emphasis on teamwork that begins at the very start of a project, any challenges that are encountered, whether they are unique or generic in nature, can be responded to immediately, decisively, and in a fashion that incorporates your wants and needs while abiding by agreed upon budgets and schedules.

Most of our projects require community involvement and many are constructed in highly-charged political environments. We recognize the importance of engaging the community early and working with client leadership to help strategize the best communication method for each unique locale. Our project team leaders are trained facilitators and have the diplomatic skills to engage, listen, and respond appropriately to stakeholders during the design process ensuring buy-in and acceptance of selected priorities and design solutions. Reporting the facts openly and transparently is a key component to managing expectations of the community and ensuring a smooth construction process.

Section

7



Experience in
Working with State
and Local Agencies

Section 7

Experience in Working with State and Local Agencies

Describe the experience of key personnel in working with and receiving approval from State Agencies including but not limited to the California Department of Education, the Division of State Architect, California Department of Fish & Game and the Department of Toxic Substances Control. Also, describe experience working with local jurisdictions including City/Counties Engineering Departments, Public Works Departments, Local Fire Departments, County Environmental Health Services Departments among other permitting agencies.

Experience Working with Agencies

California Department of Education (CDE)

Through working on hundreds of educational projects throughout California, we are deeply familiar with the California Department of Education and have had former team members involved in the authorship of the "Grid Neutral Schools" section of the California Department of Education's "Schools of the Future" initiative.

Division of the State Architect (DSA)

Our vast experience in the California K-12 and higher education sectors has given us the opportunity to understand the complex nature of working with State Regulatory Agencies such as DSA. We have a thorough understanding of the processes and procedures required by these agencies with regards to plan review, code interpretation, permitting, testing and inspection, construction phase changes, project closeout and agency certification. We have found that the best way to lead each project through this process is to develop professional, working relationships with the agency personnel.

At the start of each education project, we make it a priority to schedule a pre-submittal meeting with DSA representatives to introduce the project, communicate the project scope and design approach, and listen to agency personnel.

By facilitating this initial meeting, we set the tone for a collaborative relationship with DSA that serves the project well and establishes a roadmap for the design review process. As we proceed through the development of the design phase of each project, our managers continue to lead the collaboration process with DSA to ensure that the design is tracking in a timely manner and that code requirements and agency expectations are being met.

Once a project achieves DSA approval, our efforts don't stop there. As you know, DSA continues to play a vital role throughout the construction and close-out phase of each project. Because of this, we continue to shepherd the project by continuing to collaborate with the DSA Inspector

of Record to ensure that changes to the approved design documents are adequately documented and submitted to DSA for review and approval.

The most challenging aspect of managing these projects has not been the construction phase oversight or agency preconstruction approvals, but the on-time completion of punch lists, timely receipt of DSA approved change orders (CCDs), contractor close-out, and final DSA certification. We have been able to overcome these challenges through persistence and follow-up and because we are familiar with each of the required forms and documents needed to be gathered from project inception through final record of payment.

Office of Public School Construction (OPSC)

Because we have been performing project/construction services for so many years, we have been able to build excellent working relationships with all the State agencies that govern public school construction. This includes the OPSC.

Other Agencies

Cumming has experience interfacing with the California Department of Fish & Game and the Department of Toxic Substances Control. Our team members have addressed abandoned underground storage tanks, arsenic removal and the phantom identification of 1-3 Butadiene contamination with representatives of the DTSC. In each instance we were able to plan for removal and obtain timely clearance. In addition, Cumming has developed good working relationships with staff from multiple local jurisdictions including engineering departments, public works departments, and permitting agencies. Cumming has successfully interacted with the State Fire Marshal. We have experienced, licensed, professional fire protection engineers. Our staff can check plans for compliance with all applicable fire code and standard requirements, including but not limited to: ICC Fire Code, Uniform Fire Code, California Fire Code, Life Safety Code, NFPA standards and local/regional amendments.

Section


8



Proof of Insurance

Section 8

Proof of Insurance

Client#: 423679		CUMMIGROUP		DATE (MM/DD/YYYY) 12/17/2019			
ACORD™		CERTIFICATE OF LIABILITY INSURANCE					
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer any rights to the certificate holder in lieu of such endorsement(s).</p>							
PRODUCER Marsh & McLennan Agency LLC Marsh & McLennan Ins. Agency LLC 1 Polaris Way #300 Aliso Viejo, CA 92656			CONTACT NAME: Matt McNab PHONE (A/C, No, Ext): 949-540-6939 FAX (A/C, No): E-MAIL ADDRESS: occerts@marshmma.com				
INSURED Cumming Management Group, Inc. 25220 Hancock Avenue Suite 440 Murrieta, CA 93552			INSURER(S) AFFORDING COVERAGE		NAIC #		
			INSURER A : National Fire Insurance Co of Hartford		20478		
			INSURER B : The Continental Insurance Company		35289		
			INSURER C : Continental Casualty Company		20443		
			INSURER D : American Casualty Company or Reading PA		20427		
			INSURER E : ACE American Insurance Company		22667		
			INSURER F :				
COVERAGES		CERTIFICATE NUMBER:		REVISION NUMBER:			
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>							
INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	X	X	6056835935	12/31/2019	12/31/2020	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$300,000 MED EXP (Any one person) \$15,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000 \$
C	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	X	X	6056835949	12/31/2019	12/31/2020	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$0	X	X	6020879487	12/31/2019	12/31/2020	EACH OCCURRENCE \$10,000,000 AGGREGATE \$10,000,000 \$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	X	X	6056835966 - CA	12/31/2019	12/31/2020	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
D		N/A	X	6056835952 - CA	12/31/2019	12/31/2020	
E	Professional E&O Retro: 11/7/2006			EONG23632688014	12/31/2019	12/31/2020	\$5,000,000 Per Claim \$5,000,000 Policy Agg Deductible: \$150,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)							
RE: Evidence of Coverage (Certificate Holder Name) is named as Additional Insured on General Liability, per the attached endorsement CNA75079XX (1-15); and Automobile Liability per the attached endorsement CNA71527XX (10-12). General Liability Insurance is Primary and Non-Contributory, per the attached endorsement (See Attached Descriptions)							
CERTIFICATE HOLDER				CANCELLATION			
FOR EVIDENCE ONLY				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.			
				AUTHORIZED REPRESENTATIVE 			

Section

9



Litigation History

Section 9

Litigation History

Cumming Management Group, Inc. has never failed to complete a contract, defaulted on a contract, or been denied a contract due to non-responsibility to perform. Cumming has been involved in the following claims over the past five years. The majority of these claims have occurred in South Carolina where we often perform CM multi-prime delivery services and are named by contractors in claims against the Owner.

The claims history is listed below:

Name of Claimant	Beaufort County School District – Beaufort, SC
Date of Claim	April 2012
Grounds for Claim	Design Professional Errors & Omission not corrected during constructability review performed by CUMMING as the Owner's Advocate.
Present Status	Matter settled through Mediation
Date of Resolution	January 2014
Name of Claimant	Bradley Harris / Lance Punch – Lexington, SC
Date of Claim	June 2012
Grounds for Claim	Two mechanical workers injured while installing a piece of ductwork on a project where CUMMING was the Owner's Advocate.
Present Status	Mediation has been settled.
Date of Resolution	December 2014
Name of Claimant	Palmetto Grading - Lexington, SC
Date of Claim	January 2012
Grounds for Claim	Palmetto Grading's contract was terminated for convenience and claimed wrongful termination.
Date of Resolution	April 2012
Name of Claimant	Judy's Electric - Richland, SC
Date of Claim	September 2011
Grounds for Claim	Judy's Electric claimed they incurred additional fees due to schedule changes.
Present Status	Mediated and settled.

Date of Resolution	March 2012
Name of Claimant	Elena Ferree – Lexington, SC
Date of Claim	January 2013
Grounds for Claim	Plaintiff claimed failed supervision to ensure proper and safe operation of an exiting truck.
Present Status	Matter settled.
Date of Resolution	December 2013
Name of Claimant	Mike Ritchie – Lexington, SC
Date of Claim	September 2013
Grounds for Claim	Local resident claiming environmental water quality and property damage arising from the construction of a nearby elementary school.
Present Status	Matter settled.
Date of Resolution	October 2015
Name of Claimant	Triad Mechanical, Weaver Contracting & Guarantee Company, Charleston, SC
Date of Claim	August 2015
Grounds for Claim	GC on project filed for bankruptcy and their license expired so Surety Company took project over, two sub-consultants claimed they were not paid amounts they felt were due to them.
Present Status	Matter settled.
Date of Resolution	April 2016
Name of Claimant	Jasper County School – Ridgeland, SC
Date of Claim	April 2012
Grounds for Claim	A sinkhole developed at a school site.
Present Status	Matter settled.
Date of Resolution	April 2017

Name of Claimant	West Tech Mechanical, Glendale, CA
Date of Claim	November 2016
Grounds for Claim	Mallcraft, the GC had missed several contractual completion dates as well as adjusted project completion dates to accommodate their non-performance. These delays were attributed to several of their subcontractor's lack of manpower and performance and project defects.
Present Status	Matter settled.
Date of Resolution	October 2019
Name of Claimant	China Construction, Charleston, SC
Date of Claim	March 2018
Grounds for Claim	This was a result of a subcontractor for China (Judy's Electric) going under mid-way through construction of St Andrews ES in late 2014 (school opened July 2015 6 months late) in which China had not required Judy's to have a bond. The District had to supplement the electrical contractor in order to get the project completed so they had several back charges to China. China is requesting unpaid retainage and damages.
Present Status	Matter settled.
Date of Resolution	October 2019
Name of Claimant	Santa Barbara County, CA
Date of Claim	December 2019
Grounds for Claim	An architect, Rosser International, which has been sued by a municipal owner for alleged design issues has implead all of its consultants engaged on the project even though Cumming was not involved with the design and there has been no pleading of any specific wrongdoing by Cumming.
Present Status	Ongoing
Date of Resolution	Pending
Name of Claimant	David E. Trafecanty
Date of Claim	February 2020

Grounds for Claim	The suit is for injuries allegedly suffered by an employee of the general contractor, Access Pacific, Inc., on or about 11/15/18 as a result of allegedly inadequate shoring for a trench excavation. Cumming served in the role of Project Manager. As PM, Cumming was not responsible for safety conditions at the site which were the responsibility of the contractor.
Present Status	Ongoing.
Date of Resolution	Pending

Section

10



Structure and Rates;
Proposed Services
Agreement

Section 10

Structure and Rates; Proposed Services Agreement

Structure and Rates; Proposed Services Agreement
Firms are required to provide their fee structure and rates for construction management services. This will include hourly billing rates by position (proposed); staffing plan (proposed); and reimbursable schedule (proposed). Firms shall provide in the proposal a Schedule of Rates ("SOR") by position, by company entity, for each position proposed the firm, whether the firm is submitting as a prime with subconsultant(s), or as joint venture or partnership. The SOR shall identify proposed reimbursables by category. Travel and related expenses shall be reimbursed in accordance with the federal government Joint Travel Regulation.

A form of the project specific Construction Management Services Agreement ("Agreement") is attached hereto as Exhibit E. The final form of the Agreement will incorporate the final scope of work and not-to-exceed fee negotiated between the District and the selected firm, which shall be negotiated with the successful firm for each individual project. Firms are required to identify and explain any proposed changes or exceptions to the form of Agreement. Suggested language revisions not noted in firm's proposal will not be considered by the District. The selected firm will be expected to enter into the Agreement within fifteen (15) days following notification of selection for any specific project. The Agreement will be subject to approval by the Board of Trustees at a duly noticed meeting.

Proposed Services Agreement

Cumming has read the Agreement and has the following proposed revision:

9.2 This section should be clarified that it pertains to section 9.1 items.

Structure and Rates

The following rates are our standard rates for this proposal; however, these rates are negotiable based on project size, duration and number of staff needed. Hourly rates will be the same for all phases of the project.

Discipline	Hourly Rate
Project Management	
Senior Director	\$215.00
Senior Project Manager	\$190.00
Project Manager	\$175.00
Constructability Manager	\$170.00
Assistant Project Manager	\$145.00
Project Engineer	\$115.00
Administration / Clerk	\$70.00
Senior Scheduler	\$190.00
Cost Management	
Managing Director / Director / Regional Director	\$215.00
Senior Cost Manager	\$180.00
Cost Manager	\$165.00
Assistant Cost Manager / Estimating Technician / Intern	\$115.00
Energy and Sustainability Services	
Managing Principal	\$205.00
Project Director	\$185.00
Senior Project Manager	\$175.00
Project Engineer	\$175.00
Project Manager	\$155.00
Assistant Project Manager	\$135.00
Project Coordinator	\$110.00

*The rates above are good through December 2021. Rates will be adjusted January 1, 2022.



Billing Practices

Cumming is happy to work with the District on appropriate billing for your consulting services projects. We are very familiar with fee-based, lump-sum, percentage-based, and task-based fee structures. We can bill on an hourly basis per our fee schedule or we can also work on a percentage basis and lump-sum billing. We work with our clients to determine and implement whichever fee system works best for them.

Reimbursable Expenses

Reimbursable expenses incurred during the course of the project will be billed separately with no markup. We have assumed that a furnished office space will be provided near or at the project sites. Our reimbursement includes for typical office expenses such as PPE, consumables, and project equipment such as the project server, copiers, digital media and processing, duplication and printing charges, postage, express mail and overnight deliveries, courier services, and mileage for specific District required travel. Personal office equipment (laptops and cell phones) are considered Cumming overhead.

Appendix

A



Firm Brochure and Resumes of Key Personnel



K-12

Program + Project Management
Cost Management + Estimating

CUMMING
Building Value Through Expertise

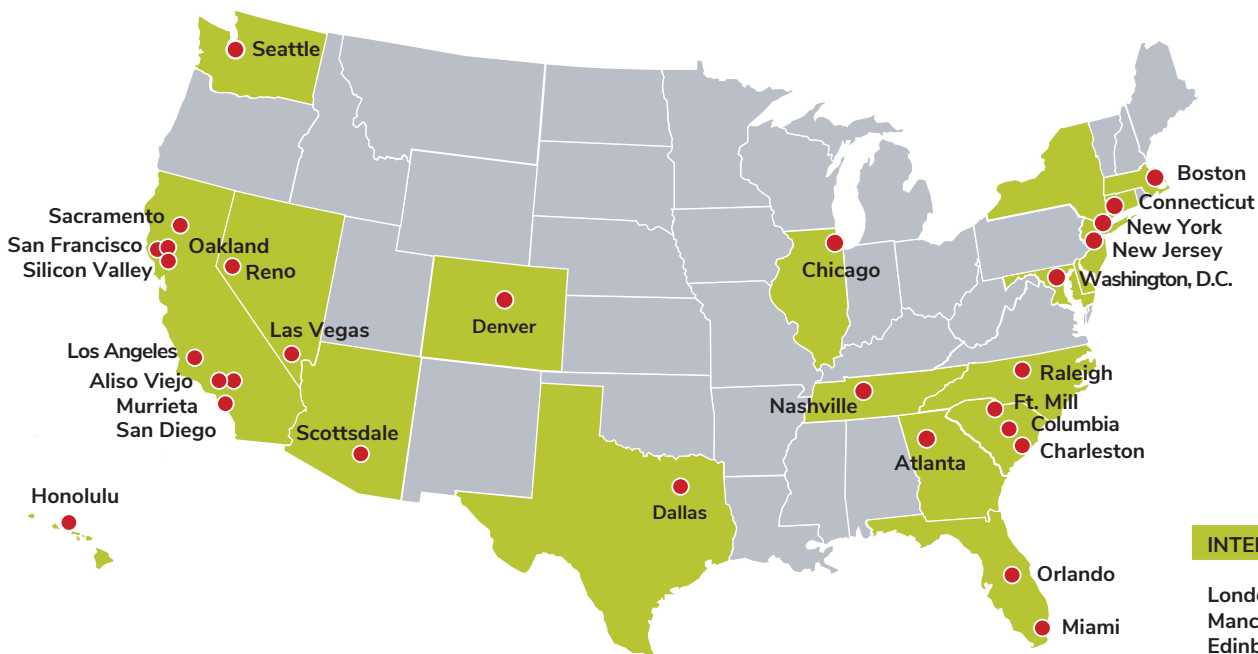
ccorpusa.com

Who We Are

Established in 1996 as a project and cost management company, Cumming has evolved into a 900-person, multi-faceted consulting firm with a determined focus on providing services that add value at every step of a project's development. Today, we serve as an advocate for our clients—solving problems, delivering solutions, and driving results.

Cumming's exceptional management skills have led to us becoming one of the most successful firms in our industry. We operate with optimal efficiency, we hire and train the most talented and motivated industry leaders, and we actively explore opportunities to improve and add value. We pride ourselves on offering the personalized service of a small company, while at the same time having the breadth of resources and company-wide standards of a larger, established organization. This enables us to provide customized, consistent, and high-quality services for our clients.

- Trusted client advocates
- Specialists in managing complex and creative projects
- Wide range of clients and project types
- Value at every step of a project's development
- More than 1,500 education projects across the country
- 29 U.S. offices; experience in all 50 states



INTERNATIONAL OFFICES

London, UK
Manchester, UK
Edinburgh, UK
Stoke-on-Trent, UK
Beijing, China

● 35 OFFICES WORLDWIDE



LAUREL DELL ELEMENTARY SCHOOL
San Rafael, CA



NORWALK LA MIRADA
UNIFIED SCHOOL DISTRICT

Charleston >excellence is our standard
County SCHOOL DISTRICT



★★★★★
Beverly Hills
Unified School District



Palo Alto
Unified School District



BUCKHORN CREEK ELEMENTARY SCHOOL
Wake County, NC

Our Services

Change is one of the few constants in today's building climate. New delivery methods are routinely explored, labor and material costs are in flux due to macro- and micro-level market shifts, and owners' needs are continuously evolving as communities and organizations seek to implement new building initiatives. Cumming continuously anticipates trends and we work hard to adjust our services to meet our clients' immediate and long-term needs. Cumming is a dynamic, adaptable consulting firm that has evolved over the years in direct response to the needs of our clients. We actively look for ways to provide additional value to the organizations and projects we serve.

Program + Project Management

Cumming offers fully integrated project management services throughout design and construction; we represent the owner by providing the technical expertise, leadership, and resources needed to drive the process and motivate teams to achieve successful project outcomes. We do this by first understanding the client's vision and then efficiently and collaboratively shepherding the process and team to achieve their goals. All projects have multiple moving parts; the importance of controlling these various components is critical. Our project managers provide continuity and consistency by developing and maintaining budgets and schedules, offering value engineering options, and mitigating risk.

Cost Management + Estimating

At Cumming, our cost management team is an integral part of every one of our assignments. Controlling cost is an essential ingredient to the success of any project, and it starts with knowing the total cost of the project as early as possible in the development process. This is why we develop comprehensive project budgets at the outset, and then closely monitor these budgets as the project progresses. Our diligent approach provides clients with up-to-date information along with the opportunity to maximize their return on investment.

Cumming's cost management group, which is one of the largest providers of cost estimating and management services in the United States, works on more than 300 projects per month. This experience gives us an unparalleled volume of industry knowledge, which we use to provide unbiased, detailed, and critical analyses of our clients' project costs and risks.



From pre-construction budgeting to overall project and cost management through all phases of development, Cumming offers a suite of services that guide our clients' projects from start to finish.

- Predict Market Shifts
- Manage Risk
- Control + Manage Costs
- Guide Design + Construction
- Create Efficiencies
- Protect + Empower Our Clients
- Anticipate + Avoid Problems
- Drive Results

Our Services

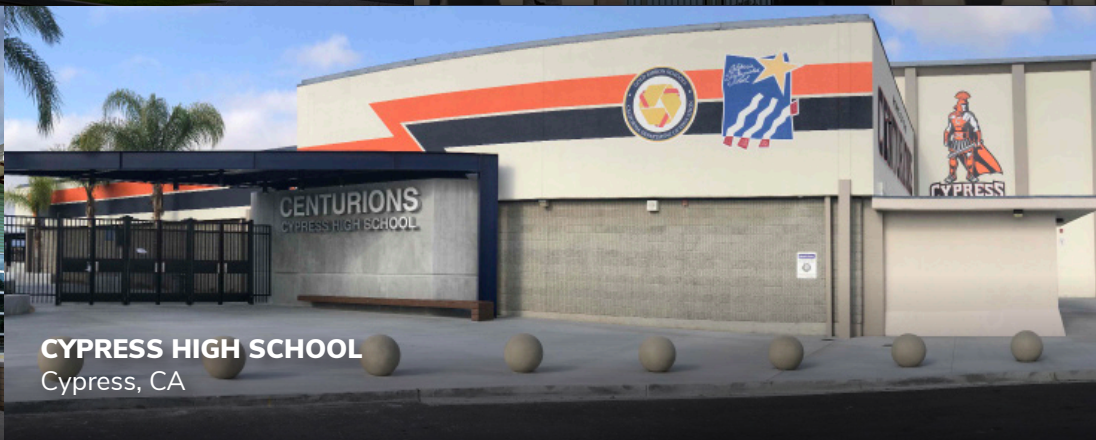
Cumming's reputation in the K-12 sector is based on our understanding of our clients' needs, our proactive approach to meeting those needs, and our ability to efficiently staff projects with highly skilled professionals.

The following table outlines our full suite of services and reflects our unique ability to offer not only comprehensive project and cost management, but also à la carte services at any stage of project development. This approach — mixing custom flexibility with the full capabilities of our company — ensures that our K-12 clients are getting exactly the services they need and want, exactly when they need and want them.

Comprehensive + Integrated Services

	Planning	Design	Construction	Close-Out/Post-Construction
Program, Project + Construction Management	<input type="checkbox"/> Project scope development <input type="checkbox"/> Feasibility Studies <input type="checkbox"/> Entitlements <input type="checkbox"/> Project delivery consulting <input type="checkbox"/> Consultant procurement	<input type="checkbox"/> Design criteria development <input type="checkbox"/> Design management <input type="checkbox"/> Sustainability consulting <input type="checkbox"/> Constructability reviews <input type="checkbox"/> Value analysis <input type="checkbox"/> Risk management	<input type="checkbox"/> Bid facilitation <input type="checkbox"/> Change management <input type="checkbox"/> Quality assurance <input type="checkbox"/> Contract administration <input type="checkbox"/> QA/QC status meetings <input type="checkbox"/> Schedule management	<input type="checkbox"/> FF&E coordination <input type="checkbox"/> Punchlist facilitation <input type="checkbox"/> Move management <input type="checkbox"/> Lessons learned <input type="checkbox"/> Expert testimony
Schedule Management	<input type="checkbox"/> Master scheduling/budgeting <input type="checkbox"/> Schedule scenarios <input type="checkbox"/> Phasing + logistics <input type="checkbox"/> Project cost-loading	<input type="checkbox"/> Risk analysis (QRA) <input type="checkbox"/> 4D + 5D modeling <input type="checkbox"/> Design + construction scheduling	<input type="checkbox"/> Earned value + monitoring <input type="checkbox"/> Schedule risk mitigation <input type="checkbox"/> Resource analysis + schedule controls / Div 1	<input type="checkbox"/> Audit <input type="checkbox"/> Expert testimony <input type="checkbox"/> Commissioning management
Cost Management + Estimating	<input type="checkbox"/> Market studies <input type="checkbox"/> Feasibility analysis <input type="checkbox"/> Target cost modeling <input type="checkbox"/> Contingency analysis	<input type="checkbox"/> Life cycle cost analysis <input type="checkbox"/> Sustainability cost analysis <input type="checkbox"/> Quantity takeoffs <input type="checkbox"/> Milestone estimating <input type="checkbox"/> Value engineering <input type="checkbox"/> Risk analysis (QRA)	<input type="checkbox"/> Bid review <input type="checkbox"/> GMP negotiation <input type="checkbox"/> Continuous cost management <input type="checkbox"/> Change order reviews <input type="checkbox"/> Payment application reviews <input type="checkbox"/> Project monitoring / lender services	<input type="checkbox"/> Final change order approvals <input type="checkbox"/> Final payment reviews <input type="checkbox"/> Benchmarking <input type="checkbox"/> Asset tagging <input type="checkbox"/> Project + cost auditing
Program + Project Controls	<input type="checkbox"/> Controls systems design <input type="checkbox"/> Controls systems integration <input type="checkbox"/> Processes + procedures <input type="checkbox"/> Budget forecasting <input type="checkbox"/> Team communications	<input type="checkbox"/> Design status reporting <input type="checkbox"/> Budget monitoring <input type="checkbox"/> Milestone scheduling	<input type="checkbox"/> Cash flow monitoring <input type="checkbox"/> Cash flow reporting <input type="checkbox"/> Earned value reporting <input type="checkbox"/> Document controls <input type="checkbox"/> Cost controls <input type="checkbox"/> Schedule controls	<input type="checkbox"/> Close-out reporting <input type="checkbox"/> Document archiving <input type="checkbox"/> Financial close-out
Energy + Sustainability Services	<input type="checkbox"/> Benchmarking <input type="checkbox"/> Energy audits <input type="checkbox"/> Renewable energy (Solar PV) <input type="checkbox"/> Sustainability master planning <input type="checkbox"/> Electric vehicle (EV) planning <input type="checkbox"/> Climate action plans	<input type="checkbox"/> Design review (energy codes) <input type="checkbox"/> Life cycle cost analysis <input type="checkbox"/> Third-party financing <input type="checkbox"/> Revolving green funds <input type="checkbox"/> Commissioning plan <input type="checkbox"/> Building certification (LEED, ENVISION, WELL)	<input type="checkbox"/> LEED certification (or other standard) <input type="checkbox"/> Utility incentives + rebates <input type="checkbox"/> Commissioning	<input type="checkbox"/> Retro commissioning <input type="checkbox"/> GHG reporting <input type="checkbox"/> Operations + maintenance GPRO training <input type="checkbox"/> Environmental management systems (ISO 14001)

K-12 Experience



Additional Experience

Project	City	Value
Buist Academy	Charleston, SC	\$33 million
Cabot Yerxa Elementary	Palm Springs, CA	\$30 million
Castro Valley Unified School District	Castro Valley, CA	\$25 million
Charleston County School District	Charleston, SC	\$2 billion
Clinton High School	Clinton, SC	\$44 million
Dublin Unified School District	Dublin, CA	\$17 million
Fort Mill School District Four	Fort Mill, SC	\$569 million
Fullerton Joint Union High School District	Fullerton, CA	\$125 million
Hector Godinez Fundamental High School	Santa Ana, CA	\$75 million
Los Angeles Unified School District	Los Angeles, CA	\$5 billion
Middle College High School	Los Angeles, CA	\$26 million
Oakland Unified School District	Oakland, CA	\$87.5 million
Orange Unified School District	Orange, CA	\$350 million
Pajaro Valley Unified School District	Watsonville, CA	\$20 million
Sacramento City Unified School District	Sacramento, CA	\$414 million
San Rafael City Schools	San Rafael, CA	\$120 million
School District 5 of Lexington and Richland Counties, CATS Center	Columbia, SC	\$42 million
Sequoia Union High School District	Redwood City, CA	\$45 million
South San Francisco Unified School District	South San Francisco, CA	\$13 million
Sullivan's Island Elementary School	Charleston, SC	\$26.4 million



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John Olsson, DBIA, LEED AP

Project Executive

John has more than 40 years of extensive education and commercial construction experience on K-12 and higher education projects. He is an experienced leader with the ability to coordinate efforts of diverse project teams successfully. John is experienced in company and division strategy, profit generation, cash flow management, corporate policy, and staff management. He is actively involved in the design-build process and integrated project delivery methods for projects including new construction, renovation, tenant improvements, seismic upgrades, data centers, historical renovations, and energy/solar projects. Additional expertise includes estimating, value engineering, scheduling, budget control, and all aspects of construction management.

Education

Bachelor of Science,
Construction Management,
California Polytechnic State
University, San Luis Obispo

Certifications

DBIA, Design-Build Institute of
America

LEED Accredited Professional,
U.S. Green Building Council

General Building Contractor,
CA #B407635, AZ
#ROC243517

Relevant Experience

Sequoia Union High School District
Construction Manager for Multiple
Campuses and Projects over Eight Years,
which included:

- Tide Academy New High School,
Menlo Park, CA
- Carlmont High School: Performing
Arts Theatre, Music and Art
Building, Belmont, CA
- Science Buildings, New School
Wing, Special Education Building
and Parking Infrastructure
Improvements, Belmont, CA
- Menlo-Atherton High School,
Multiple Campus and Classroom
Upgrades, Atherton, CA
- Sequoia High School, Carrington
Hall, Redwood City, CA
- Woodside High School, Performing
Arts Center, Woodside, CA
- Woodside High School, Science
Building, Woodside, CA
- District Administration Building,
Redwood City, CA

Oakland Unified School District **Oakland, CA**

Cumming is managing more than
10 projects ranging from \$2 million
to \$45 million. Our work includes
Program Management, Construction
Management, Estimating, Mediation,
Bidding, Community Presentations and
Scheduling.

San Rafael City Schools, San Rafael, CA

Project and Construction Management
for K-8 bond measure for over six
projects over a three-year period. We
work on preconstruction through
construction to provide the highest value
to the District.

Castro Valley Unified School District **Castro Valley, CA**

Program, Project, and Construction
Manager for their Measure G bond
program. Overseeing transition from
Master Plan through Design and
Construction on all district campuses.
Oversee Budgeting, Cashflow, and
Project Management and Financial
integration systems.

Pajaro Valley Unified School District **Watsonville, CA**

Program and Construction Manager
for the District – Projects included
technology upgrades, new facilities and
modernizations to mechanical, roofing,
and classroom buildings.

Weaver Union School District, Merced, CA

Modernization and new buildings for
elementary schools and a middle school
campus. Projects consisted of aesthetic
improvements, accessibility upgrades
to classrooms, and new District Office
Building.

San Jose State University, San Jose, CA

Senior director overseeing multiple
projects from the New Aquatics Center,
the South Campus Projects, various
infrastructure upgrades and other
improvements.

City College of San Francisco, San Francisco, CA

Cumming is providing Program, Project
and Construction Management services
for the new \$850 million bond program.



Teri Mathers, LEED BD+C, MBA

Senior Project Manager

Teri is a reliable, detail-oriented Senior Program Manager with valuable experience working on projects in the higher education sector. She has extensive experience working with high profile Universities, such as the University of California, San Francisco; University of California, Berkeley; and Stanford University. She is known for her technical knowledge and strong ability to communicate and collaborate with project teams.

Teri also has provided project management for a variety of major capital programs by leading project teams in the execution of projects from inception to completion. She provides leadership, coordination and support to every project team she is managing and ensures the completion of projects within budget, on schedule and meeting all program objectives and appropriate governmental regulations.

Education

Master of Business
Administration, St. Mary's
College of California, Moraga, CA

Bachelor of Architecture,
Carnegie Mellon University,
Pittsburgh, PA

Certifications

LEED Accredited Professional
with a Building Design +
Construction Specialty, USGBC

Licensed Architect, State of
California, No. C26702

Relevant Experience

San Rafael City Schools, San Rafael, CA

As the Senior Project Manager, provide support services for the San Rafael City Schools Bond A Program managing a Cumming team. The Program involves five elementary schools with multiple phases including moving, demolition and rebuilding or adding new buildings to active campuses. The program includes design/bid/ build and Lease/Leaseback.

University of California, Berkeley Capital Projects, Berkeley, CA

Working as a Senior Project Manager, provided project management for a variety of major capital projects. Led project teams in the execution of projects to meet program, budget and schedule. Also developed project budgets and schedules. Served as the primary liaison among campus committees, user groups, designer and contractors during all project phases. Selected and managed the services of architects, engineers, and contractors. Project delivery included CMAR, design/bid/build, and design/build. The major projects managed for the University of California, Berkeley included:

- Li Ka-Shing Biomedical Health Science Center

The anchor for a quadrangle of research and teaching buildings dedicated to the biomedical and health sciences, will house more than 450 researchers in 200,000 sq. ft. The project budget was \$257 million. It was a multi-funded, multi-phased project.

- C.V. Starr Library

67,984-sq.-ft., four-story new library which houses one of the largest collections of scholarly materials in the East Asian languages in the United States. Features of this educational facility construction project include a rare book reference collection, a media and digital materials center, reference and periodical reading rooms, study rooms, offices and a book processing center.

- Lower Sproul Redevelopment

The program is designed to revitalize the area around Lower Sproul. The program covers approximately 200,000 sq. ft. of new and renovated buildings in addition to outdoor areas. The value of the overall project is approximately \$230 million. The redesigned complex is envisioned as the true heart of student life on campus, a central meeting place where students can congregate, socialize, study, work, discuss, and debate.

Stanford University Health Center, Palo Alto, CA

As Project Manager, managed the programming, planning, design, construction and activation of projects involving acute care, laboratory, surgical suites and office areas. Provided leadership, coordination and support to the project team. Ensured completion of projects within budget, on schedule and meeting all program objectives and appropriate governmental regulations. Acted as liaison between the client and all other project participants. Responsible for planning, scheduling, assigning and overseeing the work of project participants.



William K. Gong

Senior Project Manager

William is a senior project manager with over 18 years of project management, program management, and project delivery experience. William has successfully managed and delivered a wide array of projects that covers both the public and private sectors.

Armed with the experience of managing projects for a general contractor plus years of preconstruction estimating for a specialty electrical contractor, William is able to bring a balanced focus between costs and schedule to best serve any client's needs. While William's professional experience has been delivering commercial projects that include office, hospitality, retail, and specialty spaces, his most recent assignments are managing multiple school projects. They range from newly ground up facilities to modernization projects.

Education

Bachelor of Science,
Construction Management,
California State University, Chico

Software

MS Office Suites
MS Projects
Procore
AutoCAD
Manhattan Center Stone
SureTrak Scheduling

Languages

Mandarin – Fluent
Cantonese – Fluent

Certifications

LEED Green Associate
OSHA 30 Safety Training

Relevant Experience

South San Francisco Unified School District, Martin Elementary School Modernization

Construction project manager in managing the overall construction on behalf of the school district. Responsible to oversee the design team during the construction administration phase, managing the general contractor and its subcontractors to maintain phasing and milestone schedule, budgeting, integrate DSA inspection requirements, and managing stakeholder requirements. Project valuation is \$6 million and an 8-month schedule.

South San Francisco Unified School District, Buri Buri Elementary School Multi-Use Field Project

Construction project manager in leading the bidding and construction phases. Responsible to develop the bidding package, front end documents, and through the award of contract. Construction phase responsibility similar to Martin Elementary. Project valuation undeclared and a 6-month schedule.

South San Francisco Unified School District, South San Francisco High School Fields Project

Construction project manager in leading the bidding and construction phases. Responsible to develop the bidding package, front end documents, and through the award of contract. Construction phase responsibility similar to Martin Elementary. Project valuation undeclared and a 6-month schedule.

San Rafael City Schools, Glenwood Elementary School MPR Building

Construction project manager in managing the overall construction on behalf of the school district. Responsible to oversee the design team during the construction administration phase, managing the general contractor and

its subcontractors to maintain phasing and milestone schedule, budgeting, integrate DSA inspection requirements, and managing stakeholder requirements. Project valuation is \$4 million and a 12-month schedule.

San Rafael City Schools, San Pedro Elementary School Multiple Increment Campus Wide Redevelopment

Construction project manager in managing the overall construction on behalf of the school district. Responsible to oversee the design team during the construction administration phase, managing the general contractor and its subcontractors to maintain phasing and milestone schedule, budgeting, integrate DSA inspection requirements, furniture design coordination, and managing stakeholder requirements. Project valuation is \$14 million and a 16-month schedule. This project includes 3 ground up new buildings, overall site and parking lot redevelopment, PG&E power upgrade, technology upgrade, and modernization of an existing building.

San Rafael City Schools, Davidson Middle School Multiple New STEAM Building

Construction project manager in managing the overall construction on behalf of the school district. Responsible to oversee the design team during the construction administration phase, managing the general contractor and its subcontractors to maintain phasing and milestone schedule, budgeting, integrate DSA inspection requirements, furniture design coordination, and managing stakeholder requirements. Project valuation is \$15 million and a 12-month schedule. This project includes a 2-story ground up new building consisting of 10 lab based classrooms and the redevelopment of the surrounding site work that includes an outdoor learning space.



Education

MBA Strategy & Finance,
University of California, Davis;

B.S., Civil Engineering, University
of California, Davis

Certifications

Engineer In Training (EIT)

Affiliations

Beta Gamma Sigma Honor
Society

Firm

InnoActive Group

Michael Guardamagni

Senior Project Manager

Michael specializes in implementing cutting edge project management practices and has extensive experience in construction project management. Experiences include cradle to grave project management in public education sector from design phase to pre-construction, buyout, construction, and closeout. Michael has extensive knowledge of public contracting code and education code allowing him to advise and develop bidding requirements and audit contractual compliance. Michael has managed multiple Division of State Architect (DSA) projects, state funded projects, and public and private education campus buildout projects.

Michael's local experience with the department of public works, fire authority, city and county jurisdictions in the south bay area and peninsula allow for a thorough understanding of not only the market but also permitting and inspection procedures to allow for a successful project that is on schedule and budget while minimizing risk.

Relevant Experience

City College of San Francisco, Construct CCSF Program

Senior Project Manager: The City College of San Francisco Construct Program (Construct CCSF) is a \$845 Million bond program providing infrastructure upgrades, classroom renovations, seismic and ADA retrofits, and three major capital projects. The new Diego Rivera Theater, Student Success Building, and STEAM building initiative will modernize the CCSF campus and provide world class educational facilities to students. Michael served as a senior project manager responsible for programming and design criteria, contractor pre-qualifications and facilitating public bidding process. Active projects managed included DSA submission, approval, and closeout. Multiple projects were managed through CEQA compliance process.

San Francisco International Airport Project Management Support Services

Program Manager: Providing program management support services for the complex, \$7.3 billion dollar San Francisco International Airport Ascent Capital Program consisting of 185+ projects. The purpose of the Ascent program is to build the Airport of the future, in which customer travel experience is the priority. Provides continued Capital Program Support Services (CPSS) for the Airport Capital Improvement Program (CIP) with the primary efforts on the Ascent Program - Phase I, including: various monthly cost analysis per SFO CIP management; programmatic analysis to support successful CIP project delivery;

trade package assembly and bid, GMP management, risk analysis including contingency and cashflow management, SLBE compliance tracking and work with CMD, coordination with local authorities and regulatory agencies.

Lick Wilmerding High School Campus Expansion, San Francisco

Project Manager: The Lick Wilmerding High School Campus expansion included a demolition of the old classroom building, new 4 story classroom construction, existing admin wing demolition, new admin wing construction, and a two-story lab retrofit. Construction took place during the school year on a live campus, with utility shutdowns and tie-ins taking place after hours and on weekends to not disturb school operations.

Apple Tantau Campus Phase II, Cupertino

Project Manager: Michael served as project manager for the office building project team. Provided project oversight of \$550 million dollar campus buildout. Experience includes developing trade packages for subcontractor buyout and managing contract implementation. Roles and responsibilities have included project financial forecasting and reporting, developing and preparing project cost and schedule status reports. Extensive experience developing and implementing workflow's for internal, client, and design team interaction.



Hunter Tasseff

Project Manager

Hunter is an energetic professional with a successful track record working with teams on a diverse portfolio of complex and high-profile projects. He reviews Contractor's Requests for Payment, reviews general construction progress for conformance to budget and schedule, schedule site meetings accordingly, generates/performs the punch list to ensure substantial completion. He also analyzes value engineering opportunities and proposed materials costs. When the project bids he assists in the bid analysis and during construction, he reviews change orders and ensures the design intent gets built according to design documents, observes the progress of construction for conformance with drawings and specifications. A hands-on collaborator, Hunter is known for creating positive outcomes to technical and other project challenges while maintaining a high level of integrity and professionalism.

Education

Bachelor of Science,
Construction Management,
California Polytechnic State
University, San Luis Obispo

Welding Technology, Cuesta
College, San Luis Obispo, CA

Software Skills

ArchiCAD
AutoCAD
Bluebeam Revu
EGordian
Google Sketchup
MS Office Suite
MS Project
On-Screen Takeoff 3
Planswift 9
Revit

Relevant Experience

San Rafael City Schools

Providing construction management for a new build and renovation projects related to SRCS' Measures A and B bond program. Campuses and projects include:

- Laurel Dell Elementary School, Campus Reconstruction & Renovation, San Rafael, CA
- San Pedro Elementary School, New Modular Classroom & Administration Building, San Rafael, CA
- Glenwood Elementary School, New Modular Multi-Purpose Building, San Rafael, CA
- Venetia Valley K-8 School, Campus Reconstruction & Renovation, San Rafael, CA
- Davidson Middle School, New Modular 2-Story STEAM Classroom Building, San Rafael, CA

Castro Valley Unified School District

Performed various project engineering tasks on a multitude of projects for the past year. Worked with the client, staff and team to quickly produce results.

Oakland Unified School District

Provided change order reviews and budget analysis support to the Project Senior Director. Augmented District staff for projects needing additional construction management support.

San Jose State University, San Jose, CA

Providing Construction Management for a variety of tenant improvement projects around the University including administrative office creation and coordination, electrochromic glass upgrades, campus building upgrades, safety upgrades, and project support on new multi-level parking facility and intermural sport complex.

Downtown College Prep, San Jose, CA

Providing Construction Management for a new middle school at an old lumber yard, installing temporary classrooms, renovating two buildings to convert to a Gym and Classrooms. Work is being done in three phases, while the second two phases are done on an occupied campus.

Mountain View Community Center, Mountain View, CA

Provided change order reviews and budget analysis support to the Project Management team.



Christine Marez, LEED AP, ENV SP, CIG

Energy & Sustainability Director

Christine is a Vice President of Cumming, leading project and construction management services and energy and sustainability strategies and initiatives. She is a LEED AP and ENV SP with extensive experience developing and managing projects in the public sector. Christine has over 30 years of experience managing large capital construction programs, and 11 years of experience in electric utility design and construction.

Education

B.S., Electrical Engineering,
California State University, Los
Angeles CA

Certifications

Leadership in Energy and
Environmental Design (LEED)
Accredited Professional

Certified Inspector General (CIG)

Envision Sustainability
Professional (ENV SP)

WELL Certification
(Expected 2020)

Affiliations

Society of Hispanic Professional
Engineers (SHPE)

Construction Management
Association of America (CMAA)

Relevant Experience

Los Angeles Unified School District (LAUSD)

Director of Policies and Training / Deputy
Director of Project Management
Executive Program Manager for \$29
billion LAUSD Bond New Construction
& Modernization program leading
a program team of highly trained
construction and project managers in
project design development, construction
administration, contractor relations,
and construction program policy and
procedure development and training.
Oversight of staff and contractor
construction training and stakeholder
engagement.

Developed in-house Construction
Management Procedures Manual with
detailed procedures for project planning,
budgeting, design, environmental due
diligence, procurement, construction,
commissioning, and closeout. Conducted
Owner Authorized Representative
Certification training for over 1,500
project staff members and contractors.

LA Metro Sustainability Program Management Services

Christine is responsible for the devel-
opment of the Program Delivery Plan
defining initial tasks and scheduling mile-
stones and determining staff roles and
responsibilities to adequately assigned
resources. She works side-by-side with
Metro's Compliance and Sustainability
managers and staff, to ensure that tasks
defined meet scope requirements and
provide stakeholder engagement exper-
tise in support the comprehensive deliv-
ery of services for the following environ-
mental functional areas: Environmental
& Sustainability Policy Development &
Implementation, Energy Conservation &
Renewable Energy Management, Envi-
ronmental Management System, Climate

Change and GHG Emissions Manage-
ment, and Construction Support for
the implementation of capital project's
program.

Los Angeles World Airports (LAWA)
Construction and Logistics Impact
Christine is in an advisory role to LAWA
for services to deliver improvement
projects and initiatives, including those in
LAWA's Capital Improvement Program
(CIP) to be implemented over the next
10 years in preparation for the 2028
Olympics in Los Angeles. Cumming
is responsible for providing oversight,
scheduling, and logistical support for CIP
projects being delivered under a variety
of delivery strategies including traditional
and alternative delivery methods.

Additional Relevant Experience

- Oversees delivery of services in
CA, NJ, NY, SC, WA, and NC
- Waldorf Hotel, New York, Project
Management Services
- Los Angeles Unified School District,
Program Management
- Los Angeles County Metropolitan
Transportation Authority,
Sustainability Program
Management
- Los Angeles Department of Water
and Power, Project Management
- Los Angeles Department of
Building and Safety, Capital
Program Management
- Judicial Council of California,
Project Management
- Los Rios Community College
District, Sacramento CA
- 50+ K-12 School Districts, Project
Management, Energy Services,
Solar PV, Project Management and
Construction Support



Vaughan Clarke, LEED GA

Associate Director, Cost

As an Associate Director for cost services, Vaughan's responsibilities include leading teams through quantity analysis, on-screen takeoff, specification review, obtaining price quotes, change order estimating, estimate reconciliation, and coordinating and incorporating estimates from various project trades. He is involved with projects from the conceptual level through to construction level design documents. In addition, Vaughan is responsible for analyzing and documenting all project bid results for the Northern California region.

Vaughan supports the cost management team through all phases of milestone estimating, cost modeling, value engineering, and budgeting. In addition, he is responsible for monitoring our cost management services between milestone estimates and working with the team in making sure we have addressed any viable cost options.

Vaughan is familiar with all the requirements of the Office of Public School Construction (OPSC), California Department of Education (CDE), and Division of the State Architect (DSA) as they pertain to cost estimating.

Education

Bachelor of Science with Honors, Quantity Surveying, Cork Institute of Technology, Cork, Ireland, 2009

Certifications

Leadership in Energy and Environmental Design (LEED) Green Associate, USGBC

Affiliations

Royal Institute of Chartered Surveyors (RICS)
U.S. Green Building Council

Software

AutoCad
Buildsoft Global Estimating
Microsoft Office
MS Project
On Screen Take-off
Revit

Relevant Experience

- Berkeley USD, Solar Upgrade Project, Berkeley, CA
- Burlingame School District, Lincoln Elementary School, Burlingame, CA
- Dublin Unified School District, Murray ES, Dublin, CA
- East Side Union HSD, James Lick High School Modernization, San Jose, CA
- Fremont Union High School District- Lynbrook High School Cafeteria Remodel, Fremont, CA
- Glenview Elementary School, K-5 School Replacement, Oakland, CA
- Hayward USD, Hayward High School, New Classroom Building and Site Work, Hayward, CA
- Hayward USD, Mt. Eden High School, New Classroom Building and Site Work, Hayward, CA
- Hayward USD, New Classroom Buildings, Hayward, CA
- Hayward USD, Tennyson High School, New Classroom Building and Site Work, Hayward, CA
- Jefferson Elementary School Dist., Pollicita Middle School Master Plan, Daly City, CA
- Las Lomitas ES District, La Entrada School Master Plan, Menlo Park, CA
- LAUSD, Rowan Elementary School HVAC Feasibility Study, Los Angeles, CA
- Mill Valley School District, Mill Valley Middle School, New Campus, Mill Valley, CA
- San Leandro USD, Facilities Assessment and Master Planning, San Leandro, CA
- San Ramon USD, Stone Valley Middle School, Two New Buildings, Alamo, CA
- Sequoia Union HS District, Carlmont High School, Belmont, CA
- SFUSD, 300 Seneca, San Francisco, CA
- SFUSD, Cesar Chavez Elementary School, San Francisco, CA
- SFUSD, James Lick Middle School Modernization Assessment, San Francisco, CA
- SFUSD, John Yehall Chin Elementary School Renovation, San Francisco, CA
- SFUSD, Longfellow Elementary School Needs Assessment, San Francisco, CA
- SFUSD, Lowell High School, Replacement Classroom, San Francisco, CA
- SFUSD, Presidio Middle School Modernization Assessment, San Francisco, CA

Harry Finnerty

Project Engineer

Harry will serve as a Project Engineer for the San Mateo Union High School District's Measure L Bond Program. Harry has K-12 experience, having successfully completed numerous projects for San Rafael City Schools. He will work closely with the project team to assist with RFI submittals, schedules, and change orders. He will work on or assist with project schedule analysis and will work with contractors to assure the work is done properly and on time.

Education

Managerial Economics (in progress),
Sustainable Environmental Design (in progress),
University of California, Davis

Relevant Experience

- Davidson Middle School, New Modular 2-Story STEAM Classroom, San Rafael, CA
- Venetia Valley K-8 School, Classroom Buildings Replacement, San Rafael, CA
- San Pedro Elementary School, New Modular Classroom & Administration Building, San Rafael, CA
- Laurel Dell Elementary School, Campus Reconstruction & Renovation, San Rafael, CA
- Central Kitchen at Oakland Unified School District, Oakland, CA
- Highgate - Highgate - Park Central Hotel, Rebranding Project Planning/Scheduling/Budgeting, San Francisco, CA
- Hilton San Francisco Union Square, Pre-Construction for Cityscape Project: Interior Renovations/Improvements, San Francisco, CA
- Parc 55 San Francisco - a Hilton Hotel, Pre-Construction Phase of Full Guestroom Renovation to 17 Floors, San Francisco, CA



Matt Grinstead

Scheduling Support Manager

Matt has been working in the construction industry since 2004. His scheduling experience includes QA/QC reviews, preparation of project schedules, and analysis of the impact of contractor change orders upon the schedule. Matt is responsible for leading comprehensive analyses of construction projects to execute corrective actions on troubled projects and/or determine the fair value of a construction dispute. He performs the tasks associated with the successful completion of project services. Matt brings diverse experiences to his projects, having worked with both a large general contractor and a developer.

Education

Bachelor of Science,
Construction Management,
Arizona State University

Relevant Experience

- Laurel Dell Elementary School, Campus Reconstruction & Renovation, San Rafael, CA
- Marine View Middle School, Measure R Bond Modernization, Huntington Beach, CA
- Westmark School, Campus Improvement Scenarios/Master Plan, Encino, CA
- City of Mountain View, Rengstorff Park Community Center Renovation and Expansion, Mountain View, CA
- GSA Philip Burton Federal Bldg. & Courthouse, U.S. Marshals Service Detention Space Refresh, San Francisco, CA
- Los Angeles Convention Center, Facilities Expansion Cost & Scheduling Consulting, Los Angeles, CA

Appendix

B



District Required
Forms

EXHIBIT B

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.

Name: John Olsson

Signature: _____

Title: Senior Director

Date: June 12, 2020

EXHIBIT C

NON-COLLUSION AFFIDAVIT

(Public Contract Code Section 7106)

John Olsson _____, deposes and says that
Authorized Representative

he/she is Senior Director of Cumming Management Group, Inc.
Title Company Name,

the party providing the foregoing proposal; that the proposal is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the respondent has not directly or indirectly colluded, conspired, connived, or agreed with anyone else to put in a sham proposal; that the respondent has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other respondent, or to secure any advantage against the public body awarding the contract of anyone interested in the proposed contract; that all statements contained in the proposal are true; and, further, that the respondent has not, directly or indirectly, submitted his or her price or any breakdown thereof, or the contents thereof, or divulged information of date relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, proposal depository, or to any member of agent thereof to effectuate a collusive or sham proposal.



Signature

John Olsson _____
Typed or Printed Name