

Greystone West Company  
Statement of Qualifications and Proposal

Construction Management  
Services for the Measure L Bond Program

Due: June 12, 2020

621 West Spain Street  
Sonoma, CA 95476  
707.933.0624 Phone  
707.996.8390 Fax



# Cover Letter

---

June 12, 2020

**San Mateo Union High School District**

**Attention: Linda Carlton, Director of Maintenance, Operations and Facilities Use**

**Email address: [lcarlton@smuhsd.org](mailto:lcarlton@smuhsd.org)**

Thank you for the opportunity to present our qualifications for the San Mateo Union High School District's ("SMUHSD") RFQP for Construction Management Services for the General Obligations Measure L Bond Program.

Greystone West Company is a mid-size construction management firm specializing in the management of K-12 public school construction projects, offering expertise in the management of various project delivery methods: Design-Bid-Build, Design-Build, Lease-Leaseback and Multi-Prime. Having provided construction management services for public school districts for over 20 years, we hold extensive experience with the Office of Public School Construction, Division of the State Architect, Uniform Building Code and California Building Standards Code (Title 24 of the California Code of Regulations). Our qualifications cover all phases of construction programming, from the initial stages of planning to the closeout and DSA certification of the construction projects.

Choosing Greystone West to provide program and construction management services guarantees the District will receive the personal attention we provide to each of our clients, distinguishing us from our competitors. We are confident in our ability to deliver unbeatable service and exceptional value to your construction projects.

During the evaluation process, Todd Lee, firm principal, is authorized to speak for the firm:

Greystone West Company  
621 West Spain Street Sonoma, CA 95476  
Phone 707-933-0624, Fax 707-996-8390  
Principal Contact: Todd Lee  
eMail [todd@greystonewest.com](mailto:todd@greystonewest.com)

Thank you for your time in reviewing our qualifications and proposal. We hope to discuss them with you in greater detail.

Sincerely,

Todd K. Lee – Principal

# TABLE OF CONTENTS

---

|                                 |    |
|---------------------------------|----|
| Cover Letter .....              | 2  |
| DVBE Requirements .....         | 3  |
| Firm Information .....          | 4  |
| Project Team.....               | 6  |
| Prior Relevant Experience ..... | 7  |
| Services Provided .....         | 17 |
| State Agency Experience.....    | 20 |
| Proof of Insurance .....        | 21 |
| Litigation History .....        | 22 |
| Fee Structure .....             | 23 |
| Appendix .....                  | 25 |

# DVBE Requirements

---

Because compliance with Education Code 17076.11 ties into eligibility for state funding on a modernization or new construction of a school building project, we will address DVBE requirements on every project. In order to assess the District's 3% DVBE participation goal, we have administered DVBE programs that either require a documented Good Faith Effort or mandate a breakdown of DVBE participation to be utilized in the contract. We can implement a DVBE compliance program should the District choose to utilize one.



# Firm Information

---

Greystone West Company was established in 1997 as a California C-Corporation.

## LICENSE DETAIL

Greystone West Company

CSLB License: #753972, issued 09/14/1998

License expiration 09/30/2020

License has never been suspended or revoked

The Officers of the Corporation are Todd K. Lee, President, Kathryn Lee, Vice-President and Christopher Cochrane, Secretary-Treasurer.

Our main office is located at: Greystone West Company  
621 West Spain Street Sonoma, CA 95476  
Phone 707-933-0624, Fax 707-996-8390  
Website [www.greystonewest.com](http://www.greystonewest.com)

We also have satellite offices in Sacramento and San Jose and field offices in San Bruno and San Rafael. If awarded, work for the District would be dispatched from the main Sonoma office with support from our field office in San Bruno.

Project/Construction management is 100% of our business and, of that, 95% is the management of K-12 public school projects. Greystone West currently retains 18 employees, the majority coming from within the industry.

The following have **not** occurred in Greystone West Company history:

- Failure to enter into a contract once selected /awarded
- Withdrawal of a proposal as a result of an error
- Termination or failure to complete a contract
- Debarment by any municipal, county, state, federal or local agency
- We have assisted Districts with their claims but have not been directly named in litigation, arbitration or mediation.
- Conviction of the firm or its principals for violating any federal or state law related to construction management practice or contract performance
- Known concealment of any deficiency in the performance of a prior contract
- Falsification of information or submission of deceptive or fraudulent statements in

connection with a contract, including allegation of, or litigation relating to, violations of the California False Claims Act

- Willful disregard for applicable rules, laws or regulations

Should sub-consultants be required, they would be hired on a “per project” or “as needed” basis, engaged using a professional services agreement. As an established Bay Area Construction Management firm, Greystone West Company has a long history of collaboration with the numerous consultant firms that have worked with regional Districts to successfully complete their bond program projects.

During the 2019 calendar year, Greystone West Company completed approximately \$140 million worth of K-12 facility construction projects. Our current work commitments over the next two years (2020 through 2021) comprise of 50 K-12 facility construction projects with 41 one of those projects scheduled for completion in 2020.



# Project Team

---

The team consists of Todd Lee – Principal in Charge, John Dilena - Senior Construction Manager, Mikael Estrada and Damien Lee - Project Managers and Juan Sagarra - Project Engineer.

The proposed project team has worked on programs utilizing multiple project delivery types (Lease-Leaseback, Design-Bid-Build, Negotiated, Multi-Prime) which include new construction, modernization, and rehabilitation projects such as HVAC and parking upgrades. The assigned project managers have experience in the industry as both project managers and contractors bringing a perspective beneficial to the District.

The District will have the full support of Greystone West Company staff for all phases of construction. Each project has an assigned Project Manager, Project Engineer and Project Administrator. The Project Managers, Project Engineers and Project Administrators are presumed to spend 15-20 hours a week per project, or as needed.

## **PRINCIPAL IN CHARGE**

As the President and founder of Greystone West Company, Todd Lee will be the Principal in Charge. He carries over 30 years of planning and management experience in the construction industry. Possessing exceptional estimating and budget analysis skills, he is committed to environmentally responsible construction.

## **SENIOR CONSTRUCTION MANAGER**

John Dilena will be assigned as the Senior Construction Manager. He is a Senior Project Manager at Greystone West Company with 20 years' experience in the construction industry. He is highly skilled in establishing and managing project goals, maintaining positive client relationships and quality standards. John will be the lead project manager, overseeing the management of the District's program and implementing the prioritization plan.

## **PROJECT MANAGERS**

Mikael Estrada and Damien Lee will be assigned to the District as the Project Managers. Mikael and Damien have 30 years of combined experience in the industry, both with a strong construction background. Mikael and Damien will manage the construction of the District's projects from the design phase through to the closeout of each project and be the day to day contact for the construction team.

## **PROJECT ENGINEERS**

Juan Sagarra will be assigned to the District's projects as the Project Engineer. Together with the project administrators, they will support the project managers in all phases of the program and construction projects, processing and recording all project documentation.

Resumes for key personnel detailing their K-12 experience are included in the Appendix.

# Prior Relevant Experience

---

We have completed numerous bond programs and projects for the following Districts in the last ten years. All projects subject to DSA Approval have been closed with DSA final certification or are currently in the process of closing out.

**Client: San Mateo Union High School District**

Years of employment: 2008— Present

Contact person: Kevin Skelly, Superintendent

Contact Information: 650-558-2200, [kskelly@smuhsd.org](mailto:kskelly@smuhsd.org)

Program Description: Master Planning and Program and Construction Management for 6 High Schools, Modernization of Classrooms, Gyms and Fields, Construction of New Buildings, District Wide Solar Installation, New District Office, Maintenance & Operations Building, New Alternative High School.

Program Value (Measure M & O): \$484,000,000

**Spotlight Projects:**

San Mateo High School Book Locker Replacement  
Started 6/1/18  
Completed 11/06/18  
Contractor: Consolidated Partitions  
RFIs/Change Orders: 0/1  
Budget: \$130,000  
Project Cost: \$111,152  
Project Manager: Todd Lee



San Mateo Union High School District New Office  
Started 12/12/16  
Completed 12/18/18  
Contractor: Cahill Contractors  
RFIs/Change Orders: 25/8  
Budget: \$20,000,000  
Project Cost: \$19,892,709  
Project Manager: Todd Lee





---

**Client: Moreland School District**

Years of employment: 2004— Present

Contact person: Patricia Ernsberger, Assistant Superintendent Business Services

Contact Information: 408-874-2922, [pernsberger@moreland.org](mailto:pernsberger@moreland.org)

Program Description: Master Planning for 5 Elementary Schools & 1 Middle School. Modernizations, Addition and Renovation of Classrooms, Construction of New Buildings, District Wide Solar Projects, Modular Replacement and District Downsizing of 8 Schools to 6 Schools

Program Value: \$32,000,000

**Spotlight Project:**

Moreland Middle School Music Building

Started 4/23/18

Completed 11/20/18

Contractor: Kent Construction

RFIs/Change Orders: 41/1

Budget: \$931,203

Project Cost: \$917,552

Project Manager: Sara Wetzel



---

**Client: Larkspur-Corte Madera School District**

Years of Employment: 2004 – Present

Contact person: Wolf Gutscher, Director of Operations and Sustainability (*previously*)

Contact Information: 415-378-3799, [wolfgutscher@yahoo.com](mailto:wolfgutscher@yahoo.com)

Program Description: Needs Analysis and Planning resulted in the Modernizations of elementary and middle schools and the construction of a New Elementary School

Program Value: \$43,000,000

**Spotlight Project:** Cove Elementary School Phase 2

Started 4/11/15

Completed 11/09/15

Contractor: GCCI, Inc.

RFIs/Change Orders: 64/2

Budget: \$2,629,000

Project Cost: \$2,962,302

Project Manager: John Dilena

**Spotlight Project:**

Neil Cummins Elementary

School Phase 2 Modernization

Started 03/27/15

Completed 09/07/15

Contractor: GCCI, Inc.

RFIs/Change Orders: 65/1

Budget: \$4,304,796

Project Cost: \$5,657,096

Project Manager: John Dilena



---

**Client: St. Helena Unified School District**

Years of employment: 2011— Present

Contact person: Marylou Wilson, Superintendent

Contact Information: 707-967-2701, [mwilson@sthelenaunified.org](mailto:mwilson@sthelenaunified.org)

Program Description: Program and Construction Management services include a new high school vocational education complex, middle school portable classroom replacement, high school special education classroom conversion, primary school floor covering & replacement, new aquatic center, new theater, renovated sports fields, new playground and District-wide site and technology upgrades.

Program Value (Measure B & C): \$60,000,000

**Spotlight Project:**

St. Helena High School New Auditorium

Started 5/4/15

Completed 10/18/16

Contractor: Wright Contracting, Inc.

RFIs/Change Orders: 267/7

Budget: \$12,500,000

Project Cost: \$12,887,765

Project Manager: Todd Lee

**Spotlight Project:**

St. Helena Elementary School Kitchen and Cafeteria Upgrades

Started 6/9/18

Completed 1/1/19

Contractor Murray Building Co.

RFIs/Change Orders: 40/1

Budget: \$1,295,000

Project Cost: \$1,374,137

Project Manager: John Dilena



---

**Client: Mountain View-Whisman School District**

Years of employment: 2012— Present

Contact person: Rebecca Westover, Chief Business Officer

Contact Information: 650-526-3550, [rwestover@mvwsd.org](mailto:rwestover@mvwsd.org)

Program Description: Master planning and construction management for two middle schools and nine elementary schools

Program Value: \$198,000,000

**Spotlight Project:**

Mariano Castro Traditional and Gabriela Mistral

Dual Immersion School Phases 1-4

Started 9/21/16

Completed 03/13/19

Contractors: Aram Electric, Dryco and BHM Construction

RFIs/Change Orders: 271/13

Budget: \$34,520,098

Project Cost: \$35,736,351

Project Manager: Jason Cave



---

**Client: Twin Rivers Unified School District**

Years of employment: 2016— Present

Contact person: Bill McGuire, Deputy Superintendent of Administrative Services

Contact Information: 916-566-1600 ext. 50138 [bill.mcguire@twinriversusd.org](mailto:bill.mcguire@twinriversusd.org)

Architect: PBK Architects – Roy Montalbano, 713-805-2640

Program Description: Construction management for new high school pool, site upgrades and modernizations. Planning for upcoming modernization projects.

Program Value: \$50,000,000

Current Workload: Modernizations are underway at all campuses

**Spotlight Project:**

Foothill Ranch MS Roof Replacement

Started 6/1/18

Completed 8/1/18

Contractor MCM Roofing

RFIs/Change Orders: 4/0

Budget: \$1,500,000

Project Cost: \$1,333,100

Project Manager: Chris Zunino

**Spotlight Project:**

Regency Park ES Modular Classrooms

Started 12/17/18

Completed 6/28/19

Contractor McCuen Construction

RFIs/Change Orders: 19/7

Budget: \$1,600,000

Project Cost: \$1,015,000

Project Manager: Chris Zunino

**Client: Novato Unified School District**

Years of Employment: 2010 –Present

Contact person: Yancy Hawkins, Assistant Superintendent- Business & Operations

Contact Information: 415-897-4260, [yhawkins@nUSD.org](mailto:yhawkins@nUSD.org)

Architect: Sommers Architecture—Trent Sommers, 530-781-3112,  
[tsommers@sommersarch.com](mailto:tsommers@sommersarch.com)

Program Description: Modernization & New Construction of Cafeterias, Gyms, Classroom Buildings at high schools and elementary schools, District Wide Solar Installation at 9 sites.

Program Value: \$222,000,000

Current Workload: New Performing Arts Centers, STEM Buildings and M&O Building under construction.

Roofing, HVAC and field turf projects recently completed.

**Client: Union Elementary School District**

Years of employment: 2015— Present

Contact person: Denise Clay, Superintendent

Contact Information: 408-377-8010 [clayd@unionsd.org](mailto:clayd@unionsd.org)

Architect: Quattrocchi Kwok Architects– Mark Quattrocchi 707-576-0829

Program Description: Planning and construction management for six elementary schools, two middle schools and one pre-school.

Program Value: \$125,000,000

Current Workload: Classroom buildings modernizations and site upgrades recently completed. New Maintenance & Operations Building and multi-site upgrades starting summer 2020.

## EXHIBIT D QUESTIONS AND ANSWERS

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

We have not been directly named in any litigation, arbitration, or mediation. Since inception, we have assisted Districts with their claims and have resolved nearly \$100 Million in claims for our clients.

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

One particularly challenging construction project was the modernization of Walnut Creek Intermediate School for the Walnut Creek School District. Due to the size and scope of the project construction was originally scheduled to be phased over two summers. DSA submission and subsequent approval was contingent upon the design team obtaining DSA approval of Design Criteria Reports. Approval of these reports became a challenge for the design team and in order to keep the project on schedule the project was broken into three phases. By doing so we were able to maintain the summer of 2020 construction schedule by obtaining DSA approval for the modernization of phase 1 buildings that were not affected by the DCR's and essentially flipped the phasing of the project so that phase 2 and 3 will be completed in the summer of 2021.

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

Greystone West focuses extensively on project programming, budget, and schedule to ensure the completion of any construction project meets District expectations, including the Board of Trustees and Citizens Oversight Committees. Consistent communication is key to this approach.

During initial programming, design and budget, updates are brought to the Board of Trustees regularly and a formal presentation seeking Board approval for schematic design and associated budget is taken as a standard for our projects. Subsequent updates are taken for permission to bid the project and award the project, weekly schedule updates are distributed through the District during construction, and any proposed change orders are reviewed for merit, explained to the board and brought forth with explanations of budget impacts.

Similarly, Greystone West attends quarterly meetings of the Citizens Oversight Committee to provide updates about which projects have been completed or are currently underway, and where the budgets stand for each project to ensure fiscal transparency.

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

Though the approach may sound understated, Greystone West reviews potential change orders by first assessing the steps needed to implement the work; impact to materials, labor and time are estimated from an independent perspective and subsequently compared to the PCO received. Materials prices are compared against a number of other projects and market rates to determine reasonableness, productivity is assessed to determine whether the labor and rates associated with the PCO corresponds to actual required time, and any extraneous impacts for schedule or sequencing are reviewed. To the extent our estimates differ from PCOs received, we approach the contractor for explanation and offer our view of how the work can be performed. When a fairly priced PCO is complete, it is brought to the Board of Trustees with an explanation of its need, impact to budget, and recommendation for approval.

**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?**

Our fee is fixed and based on the computed building cost of the project. Our fee remains fixed regardless of schedule changes and does not adjust based on the value of the construction contract or amendments to the construction contract due to change orders.

**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?**

It does not. Because Greystone West operates on a fixed fee basis, we have never in our 20+ year history requested a fee adjustment for a project running long.

**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.**

Yes. We managed a modernization project that had a shed for emergency services equipment on site. One drawing in the plans called for the shed to be demolished. Another drawing called for the shed to be relocated. During the pre-construction meeting the contractor was directed to salvage the shed. But during the course of construction, the contractor demolished the shed. We agreed to split the cost of replacing the shed and all the contents with the contractor and the architect.

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

Our typical process is to first assess the cause of the problem and extent of the issue by visiting the site. We subsequently review our records and determine whether any extended warranties for equipment, roofing, etc. may apply and to review the original project team relative to design and installation

Depending on how many years beyond warranty, likely success, cost and lifespan of repair vs replacement, and whether any additional damage has occurred, we determine the appropriate steps to either remediate the problem or replace the associated system. To the extent the original contractor was cooperative, and failures were caused by materials or conditions rather than workmanship, we make contact to determine whether more competitive pricing could be obtained as a result of their familiarity with the project.

**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?**

Greystone West uses fully developed estimates from drawing take-offs. Generally there are two methods of estimating a project; square footage based, which accounts for square footage of each material involved and applies a cost average per square foot of the installation, or a fully developed take-off, which provides a much more accurate and detailed view of costs. The process for a fully developed estimate requires quantifying all materials needed to construct a project by surveying the drawings, assessing the labor required to put those materials in place and examination of any special factors which may impact costs. Labor rates, individual materials costs, escalation, and regional factors such as material off-haul are all factored into a fully developed estimate.

We typically provide two estimates during the design development phase of a project, a third estimate during schematic design, and a final estimate ahead of bidding the project. We believe that multiple estimates allow critical adjustments to the design of a project to take place and ensure that funds are maximized to deliver the best project for the expected budget.

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

Our first step is determining why this occurred, typically starting with bidder outreach. If a project had a limited amount of competitive bids, we reach out to plan-holders that did not bid the project to determine whether internal factors, other work, or concerns about the project played a role the decision not to bid and whether re-bidding the project would remedy this issue.

If bids are high despite adequate competition, we interview bidders to determine whether there was enough competition in subcontractor trades, whether certain materials quotes came in higher than expected or whether concerns about an element of the project caused higher bid amounts. To the extent these factors can be corrected by re-bidding a project, we typically move forward with this recommendation. If the project schedule requires moving forward despite the budget, we typically examine the possibility of value engineering or other forms of adjustment which can be implemented during construction to bring the project closer to budget.

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

Our first steps are to determine timeliness and validity of the bid protest. If the protest is received on the required timeline, we analyze its content and soundness; occasionally complaints are ill-founded or based entirely on supposition as result of hard feelings from losing a project and can be dismissed with the appropriate response from the District. If indeed the grounds for protest arise from a legitimate factor such as omission of required bid documents, or provable inappropriate activity, Greystone West consults with District counsel to address the items on a more detailed level. Communications may involve requesting clarification or explanation from the protested bidder. If the protest grounds prove to be legitimate, we typically collaborate with District counsel to recommend rejection of the protested bid.

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

We typically register the projects we are managing with the DIR and maintain a record of the date/time of registration for confirmation. While some Districts choose to register themselves, we always verify DIR registration of the projects to maintain state funding eligibility and conformity with public works labor compliance rules.

#### **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?**

First, we would notify the District's legal counsel of the contractor's intent to address the Board. Second, we would review and discuss with both the District and legal counsel the bid results in detail and lastly, we would prepare for the contractor's attendance at the board meeting. A representative from Greystone West would be present at the meeting to correlate any information submitted by the contractor.

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

Additional services are charged at an hourly rate:

- \$ 185 per hour for Principal
- \$ 175 per hour for Project Managers
- \$ 165 for Project Estimators



\$ 165 for Project Schedulers  
\$ 125 per hour for Project Engineers  
\$ 75 per hour for Project Administration

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

Most of our project management team is comprised of former contractors with field experience. Our schedules are built from this contractor perspective toward constructing a project. We examine the amount of time and sequence of activities required to put work in place and build these activities into a schedule using dedicated software to flag holidays or other factors requiring adjustment. We examine coordination between trades, material timetables and any requiring curing times for concrete, paint, drywall, etc. These schedules are compared to contractor submitted schedules to determine where differences might occur and why. Our schedules are tracked on a weekly basis at minimum to ensure overall project schedule is being met, and where adjustments or recovery schedules are needed to make up time.

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

Our first step in reviewing a schedule of values is to compare the costs of each category against its appropriate scope and schedule within the project. If, for example, a project requires only a simple foundation system but has an extensive lighting package, we verify that these categories correspond appropriately to the values being listed. Similarly, we evaluate whether work occurring early in the project is valued inappropriately higher than late schedule work; this practice is frequently described as front-loading whereby a contractor may extract the majority of profit from a job early in the schedule to minimize risk. If substantial adjustments are required, the schedule of values is rejected and required for resubmission with corrections.

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

We are accustomed to coordinating moving services with District staff for summer projects. First we meet with staff to formulate a plan, deciding on a storage location for furnishings that will be returned to the classrooms and determining what items can be salvaged and which, if any, will be disposed of. Once a plan has been solidified, we obtain proposals from various moving companies so the District can award a contract. Additionally, we are there onsite for every move to address any issues that arise.

**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?**

Greystone West has completed the DSA certification process for several outstanding projects previously. We typically consult with the appropriate Division of State Architect contacts to determine which documents are necessary to complete the closeout process for uncertified projects. Once the required documents are determined, we begin the process of outreach to design professionals or consultants for their applicable paperwork, typically final verified reports, and persistently follow up until the documents are delivered.

**19. Describe how your firm addresses "Owner Furnished" materials**

Where owner furnished material exist prior to bidding a project, we generally include (to the extent applicable) full model numbers, dimensions, quantity and condition of items requiring installation to avoid any potential conflicts. For new projects, generally owner furnished materials present

complications with storage, warranty, or condition to the extent that we do not typically recommend direct owner procurement.

**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?**

Our immediate first step is to dispatch our closest employee to the site and begin the process of contacting emergency plumbers. We maintain an extensive archive of electronic drawings on our company data server which is accessible via virtual private network remote connection; plans for the Performing Arts Center would be pulled from archive and sent to the emergency plumber and site staff to expedite diagnosing and solving the problem.

**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?**

Our first step would be contacting the Principal to open a line of communication regarding the odor and subsequently dispatching our nearest employee to San Mateo High School to communicate updates from the work site. Our site employee would be directed to investigate the cause of the odor with the roofing company. Office staff would immediately begin consulting the submittals for the project to determine which products were being used and reviewing their respective material safety data sheets to provide updates. When the source of the odor could be confirmed as non-hazardous, schedule adaptation to avoid future issues would be discussed with the roofing contractor.

**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?**

Once we have verified that there is not an existing agreement for District-standard equipment specifying the controls system, we would identify other systems that are closer to the established budget and that could connect to the District's existing equipment. If a new system is available that meets the criteria, the project would be re-bid requiring the new system.

**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?**

Our first step in evaluating any schedule is determining whether the durations associated with given tasks are reasonable in the real world. Occasionally this involves examining previous productivity on given tasks in the project and applying this rate moving forward as a point of comparison to the contractor generated recovery schedule. If five classrooms required a month to complete and the recovery schedule shows ten days, the schedule is unlikely to deliver its listed dates. During the schedule recovery process, communication with the contractor needs to be persistent and directed to determine whether labor force increases, expedited material deliveries, overtime or other alternatives will be applied to deliver on the necessary timeline.

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

If the products specified by the Architect are not the District standard, we would inquire 1) why the Architect is specifying those particular products and 2) whether there are available substitutes. We would endeavor to find products that meet the specified performance requirements within the budget.



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

We find that separating personal ego from the root of the conflict is the most successful method of resolving problems of this type. At a weekly project meeting we reiterate clearly and concisely that each persons' job requires the successful completion of the project and personal feelings can be set aside for that goal. To the extent issues appear to be arising from the contractor specifically or the inspector specifically, we examine whether the problem lies with non-conforming work or with an overactive inspector and react accordingly to each. If a communication problem is present, we can implement a requirement for written inspection requests or inspection remarks copying the construction manager to ensure the parties are communicating with appropriate notice and tone.

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

Much of our staff has a background either as, or working for, general contractors. Our first step in constructability reviews is informed by this background; we approach the job as though we were building it. We evaluate the plans to ensure drawings align with one another, that section and detail references are listed appropriately, and that if a contractor were to be bidding the project- work could be quantified and priced clearly. We review for conflicts between specifications and drawings to ensure that materials are called out appropriately and that specifications avoid products known for unnecessarily high costs. Our constructability review process also includes comparing against programming notes and owner expectations to ensure the project includes expected elements and avoids negative surprises.

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

We first evaluate what has driven the bids to be over budget. This can range from limited competition among subcontractor trades or receiving fewer bids than expected, to a specification that allows fewer suppliers to quote material costs. To the extent a factor repeats itself and proves to be a problem in multiple bids, design or specification modifications are explored to bring the project budget back to the appropriate level. To the extent the market has reached a point of fatigue and bids are excessive as a simple result of opportunistic bidding, alternative project schedules are discussed with the client to determine whether rescheduling the project may be feasible.

# Services Provided

---

We have been providing program and construction management services to School Districts for over 20 years. In accordance with Government Code Section 4529.5, the project managers at Greystone West possess a working background and firm knowledge of project planning, design review and evaluation, general construction management and administration, bid evaluation, project estimating and scheduling, cost-benefit analysis, construction mobilization and supervision, claims review and negotiation. Our CSLB-licensed senior management has decades of expertise in construction ranging from field superintendence to project management. We have a thorough understanding of both the technical and administrative aspects of construction.

We have reputable skills in problem solving to keep projects moving forward while maintaining budget, always representing the District's best interests.

Basic services provided by our firm range from Bond Program Planning to DSA Closeout of Uncertified Projects, including but not limited to the following:

**Preconstruction** Design review, periodic estimates, scheduling, State-funding assistance, budget assessment, value engineering, bid package preparation and pre-bid activity (bidder pre-qualification, conference, RFIs), implementation of consultant procurement process, bid evaluation, contract document review, project communications.

**Construction and Closeout** Construction and contract administration, project oversight and compliance (DSA, OPSC, CDE, DIR), document control and maintenance, conduct project meetings, budget management and cost control, scheduling, quality control, change order review and negotiation, claim assessment and resolution, progress payment review and processing, permit assistance, coordination of consultants, monthly reports (as required), collect and review closeout documents (as-builts, warranties, etc.) for transmittal to District, oversee warranty period work.

As witnesses to the trends influencing education, we know the learning needs and priorities of a School District can change quickly. Our role demands we maintain the flexibility to adapt facility plans to reflect local desires and the current priorities of our client.

We visit each site and review the project list with the Owners, District representatives, principals and staff. We evaluate the as-built drawings, existing conditions, locations, accessibility and all other factors that might impact the project. We ask that we tour the sites with your facilities/maintenance teams so that we can ensure implementation of fixing overdue maintenance issues that could not be done for years due to budget constraints.

As your construction managers, we will provide you survey estimates, **budgets and schedules** for all projects included in the program. For projects with tight timetables, we break out the construction work into phases or into multiple bid packages to ensure completion within the timeframe. To move projects into construction within the earliest possible time frames, we

often implement the following: incremental submission to DSA, project phasing, multiple prime packages, and/or fast-track construction scheduling. This approach has proven successful in the past on large projects constructed on occupied sites such as the Crittenden and Graham Middle Schools Modernizations for the Mountain View Whisman School District. Recently, we completed multiple concurrent elementary school projects as well District Office Renovations using these same means.

Familiar with expediting schedules to ensure projects are completed on time, we set milestones during the design phase with explicit durations and damages should these deadlines not be achieved. During construction, we make certain that project documentation (such as RFI's or Change Orders) is timely processed so as not to cause any delays. We are quick to address identified deviations, analyze any impacts to schedule and take corrective measures such as progressing with work on a T&M basis, accelerating the schedule or redefining the Critical Path.

Our process of **plan checking** construction documents begins with a detailed cost estimate. We do this at four stages of the project; conceptual, schematic design, design development and when final construction drawings are completed and ready for bid. We look at the documents from a contractor's perspective, providing insight that few of our competitors can match. By preparing an estimate exactly as if we were bidding the project, we identify missing or conflicting information that would otherwise often result not only in change orders, but higher bids. We identify conflicts or omissions between the disciplines, foreseeing future problems and mitigating them from the start.

Modernization projects require a different level of scrutiny for unforeseen conditions. Our approach is to verify the current conditions by taking the Architect and CM teams to the site for reconnaissance of the existing buildings. To authenticate the actual conditions, the team goes room by room with the as-built drawings, noting any variances to ensure the project drawings will be accurate.

**Quality Control** starts with the design documents. We request that the products proposed by the architect pass the standards of the maintenance staff. We know in the end that while we want aesthetically pleasing projects for our clients, we also want to produce projects that can also be more easily maintained. During the Construction Phase, weekly meetings are held with the contractor, the inspector, the District representative and any other party member in attendance to address any issues that arise on the project. The project manager routinely walks the site to ensure project safety and compliance. Construction progress, procedures and cost for the project are documented and routinely distributed to all participating parties.

We have developed a strong working relationship with the integral **state agencies** and know what is expected to deliver a successful and complete project and secure state funding. On behalf of our clients, we routinely establish PTN numbers, submit state agency forms, implement pre-qualification procedures, register awarded projects with the DIR and notify contractors of the requirement to upload certified payroll reports. Greystone West has assisted our clients

in effectively securing state funding by submitting Career Technical Education Grants, Facility Hardship, Modernization and New Construction Applications for Funding. Staying current on codes and policies, we also assist the Architect by performing constructability reviews prior to DSA submittal.

**Final DSA certification** requires coordination with Architect. On our end, we make sure to resolve change orders in a timely manner and have streamlined the process of obtaining the final documents and signatures for upload into DSA Box. Our staff members will work diligently to ensure projects receive certification of compliance from DSA so future projects at the site are not jeopardized. Additionally, we will assist our clients to close out uncertified projects; we have never taken on a client that did not have uncertified projects needing to be closed out.

It is through constant communication with the client and other project team members that we define the program objectives and develop a plan. From conception to completion, we develop a good working relationship as a team for the project to come in on schedule and within budget. A Greystone West representative will attend Board meetings, meet with committees, provide reports, hold weekly construction meetings, distribute program/project related documentation and work personally with any of the school's project representatives to keep the projects running smoothly so that they can be completed on time.



# State Agency Experience

---

Greystone West Company is result-driven. Our role is to advocate for our client by effectively managing the scope, time, cost and quality of their projects. Specializing in Public Works projects, our duty is to provide a safe environment for students and staff alike. Our project team works side by side with the architect, IOR, engineers and DSA to ensure that your projects are on schedule and completed to your full satisfaction within DSA guidelines.

Our firm interacts with the following state agencies regularly:

|      |  |
|------|--|
| OPSC | Office of Public School Construction           |
| DSA  | Division of the State Architect                |
| CDE  | California Department of Education             |
| DTSC | Department of Toxicology and Substance Control |
| CGS  | California Geologic Survey                     |
| DIR  | Department of Industrial Relations             |
| OPR  | Office of Planning and Research                |

Furthermore, we have experience managing programs subject to project labor/stabilization agreements. We have worked alongside Building Trades Councils for many years and have incorporated their stipulations into our projects.

We have managed over 500 projects since inception; we know that educational facility projects are fast-track and budget constrained. Our management approach keeps budget and schedule in the forefront. To reduce construction cost, we utilize various project delivery methods (Lease-Leaseback or Design/Build). This gives us the ability to implement cost savings measures such as value engineering in both the design and construction phases of the project. The ability to select contractors with the best overall value to the District can also result in fewer change orders and a reduction in claims. To ensure the projects stay within the established budgets, we optimize the plans by revising project scope, value engineering, or re-working design details. Once construction begins, we manage scope through change orders and the contingencies we include in the original budget. We continually review the budget and report monthly to stakeholders for approval. Communication with the client is tantamount to a successful project.

# Proof of Insurance

---

Greystone West Company currently maintains the following insurance. If awarded, Greystone West Company agrees to augment our coverage to meet the District's requirements.

- ✓ Errors and Omissions \$2,000,000 aggregate / \$2,000,000 per claim
- ✓ Commercial General Liability \$2,000,000 aggregate / \$1,000,000 each occurrence
- ✓ Excess Liability \$3,000,000 aggregate / \$3,000,000 each occurrence
- ✓ Automobile Liability \$2,000,000 each accident

Greystone West is a financially solid corporation with the financial strength to undertake projects well within a \$300M price range. Our Dunn & Bradstreet Number is #09-451-5603.

Our projects do not result in claims however we do have significant experience in claims resolution as consultants to legal, architects and other clients that bring us on to clean up the mess. In the past 20 years we have resolved nearly \$100 Million in claims. In that same period, we have had one claim for \$3,500 that was resolved without cost to the client.

By submitting this statement of qualifications and proposal, Greystone West Company officers certify that the annual financial statement of Greystone West Company as of June 30, 2019 has been thoroughly reviewed. The money available from assets and receivables is sufficient to operate securely and efficiently.

To our knowledge, the Financial Statement is complete, accurate, free from any misstatement and is not misleading in any respect.

Copies of our Financial Statement are available upon request. Copies of our insurance certificates can be found in the Appendix.



# Litigation History

---

We have assisted Districts with their claims but have not been directly named in litigation, arbitration or mediation.



# Fee Structure

---

Our approach to fee is simple. Our fee remains negotiable: based upon staffing requirements and the complexities of the projects, the amount of projects / campuses awarded and the extensive or limited need, our fee can be discounted. Additionally, our fee can be discounted for single-trade projects such as roofing or HVAC. We can also provide services on a flat rate should the District desire. We can tailor our services to nearly any District request.

Our fee is based on the attached schedule which is the maximum we would charge the District for each project. Our fee is all-inclusive apart from multi-prime in which case we would ask for consideration for additional general conditions. Contracting on a fixed fee percentage of the board-approved schematic design estimate prevents any unpredictability in billing. Even if change orders increase the value of construction projects, our fee remains a simple, fixed amount. As can be verified with our client list, our fixed fee approach has proven to be more predictable and economical than competing services based on hourly agreements.

✓ Also included in our fee, if requested:

- ✓ Eligibility monitoring and filing to augment your bond program should funds be available from OPSC,
- ✓ Assistance with coordination of capital projects for ongoing maintenance work,
- ✓ Progress photos for website updates/updates to the Board of Trustees, and
- ✓ Assistance of DSA closeout on past District projects.

Excluded from our fee are the following reimbursable items:

- Blueprinting
- Shipping (Fed Ex or UPS)
- Claims

Our reimbursable expenses are charged at cost only. *There is no mark-up applied.*

Our hourly rates for services that fall outside of the program/construction management scope are:

\$ 185 per hour for Principal  
\$ 175 per hour for Project Managers  
\$ 165 for Project Estimators  
\$ 165 for Project Schedulers  
\$ 125 per hour for Project Engineers  
\$ 75 per hour for Project Administration



## **PROPOSED FEE SCHEDULE**

### MAXIMUM ALLOWABLE FEES—OPSC FEE SCHEDULE

The school district, as Owner, is expected to negotiate an agreement with the CM firm which is most favorable to the owner with regard to compensation for their professional service, within the maximum fee allowed. The fee must be commensurate with the service provided upon execution of the CM contract. Agreement by the district to pay the minimize the cost of the project. The amount of the maximum allowable fees is dependent upon scope, type, and duration of services but cannot exceed the maximum allowable fees without meaningful negotiations is not in keeping with the district's obligation to following schedules:

#### Maximum Schedule for Construction Management Fees (Combined Pre-Construction and Construction Phases)

Eight percent of any portion of the first five hundred thousand dollars of the computed building cost of the project.

Seven and one-half percent of any portion of the next five hundred thousand dollars of the computed building cost of the project.

Seven percent of any portion of the next one million dollars of the computed building cost of the project.

Six percent of any portion of the next four million dollars of the computed building cost of the project.

Five percent of any portion of the next four million dollars of the computed building cost of the project.

Four percent of any portion of the computed building cost of the project in excess of ten million dollars.

The computed building cost shall be the final building allowance less savings determined at bid approval. No additional fees will be allowed for change orders.

In no event may the calculated fee determined in the schedule above exceed the following:

50 percent for pre-construction services that include the bidding.

37 and 1/2 percent for pre-construction services that do not include the bidding phase.

50 percent for the construction phase, that does not include the bidding phase.

62 and 1/2 percent for the construction phase that includes the bidding phase.

The calculation of the estimated fee may be made utilizing estimates of the building cost prior to the development of the final allowance by the OLA. The fee is a reduction in the Building Allowance for the project. The final adjustment in the estimated fee will be made at bid time to reflect the actual maximum allowable Building Cost.

Pre-Construction fees will be released at Phase P approval. Construction phase fees will be released at Bid approval.

### COST ALLOWANCES NEW CONSTRUCTION AND MODERNIZATION

This Policy shall not cause the cost of a new construction Lease/Purchase project to exceed the cost standards established by the SAB.

The final building cost will include CM fees and costs of general conditions.

To obtain project savings the following will be required:

1. Require all bids in all bid package categories (all trades) to be opened at the same date and time thereby prohibiting the staggering of bids. (Growth only)

# Appendix

---

Exhibit B

Exhibit C

Key Personnel Resumes

Insurance Certificates

Letters of Recommendation



**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: Todd K. Lee

Signature: 

Title: President

Date: June 12, 2020

**EXHIBIT C**

**NON-COLLUSION AFFIDAVIT**

(Public Contract Code Section 7106)

Todd K. Lee

*Authorized Representative*

he/she is President of Greystone West Company  
*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*



Todd K. Lee

*Typed or Printed Name*



# Todd Lee

Principal

---

Greystone West Company, Inc.  
Construction Management  
621 West Spain Street  
Sonoma, CA 95476

Office: 707.933.0624

Cell: 707.479.9876

Fax: 707.996.8390

[todd@greystonewest.com](mailto:todd@greystonewest.com)

Licensed General Contractor, B Classification #753972

---

## Professional Profile

Founder and owner of Greystone West Company with over 30 years' experience in the construction management industry. Top-performing and results-driven professional with demonstrated history managing all phases of multi-million dollar projects for public and private sector clients. Outstanding team management, construction planning and scheduling, vendor and materials management, and safety and compliance qualifications. Project estimating and budget analysis skills strengthened by 15 years' experience in the competitive bidding market – highly attuned to general contracting objectives. Confirmed track-record completing projects within allotted time-frames and budgets. Committed to environmentally responsible construction with emphasis on waste reduction, energy and water efficiency, and greenhouse gas emission reduction. Excellent communication, negotiation, and problem-solving skills. Unrivaled customer focus.

## Selected Achievements

- Grew Greystone West from the ground up – responsible for new construction and renovations on over 50 major school and public works projects.
- Secured bid and oversaw construction on the North Peninsula Jewish Center a \$37 million project that included a health club, senior center, library and multi-purpose room, plus, preschool and day school classrooms.
- Developed Measure M program for the San Mateo Union High School District requiring renovation and new construction at multiple school sites – total construction valued at just under \$300 million.
- Achieved independent, third-party LEED Certification on two projects, Rohnert Park City Hall, LEED Gold, and Salmon Creek Eco Center - Harmony School District, the first LEED Platinum Certified School in the country.
- Completed major solar energy system installation for three school districts.
- Previously held Chief Estimator roles for 2 large general contracting firms specializing in public school construction – total estimated projects exceeded \$1 billion.

## Professional History

PRINCIPAL OWNER

**GREYSTONE WEST COMPANY, INC.**, Sonoma, CA — 1997 to present

Direct business operations for construction management company with 17 employees. Exclusively responsible for bids, analyzing blueprints, developing cost evaluations and project budgets, contract negotiations, scheduling project time-frames, team performance, and customer service. Optimize site development processes through continuous planning and oversight.

- Directed all aspects of planning and scheduling of construction for multiple school projects ranging in size from \$3 to \$300 million and totaling nearly \$1 Billion in volume.
- Excellent track-record working with contractors to ensure projects are completed on time and within budget.
- Establish and advance Greystone West's green building goals – support staff in various phases of LEED Accreditation (LEED AP).
- Extensive history building positive relationships with boards, committees, subcontractors, vendors, bond oversight committees, and communities at large to achieve the best possible outcome.
- Evaluate existing technology infrastructure and implement upgrades to maximize energy conservation and management; plus, integrate existing telephone and data technology in modernization programs.

**Selected Construction Managements Projects**SAN MATEO UNION HIGH SCHOOL DISTRICT, San Mateo, CA

Owner: San Mateo Union High School District — Measure M Value: \$300 Million

Measure O: \$186 Million

Description: Developed project list, Need Analysis, Cost estimating (for both M & O funded projects).

Planned and oversaw Measure M funded new construction and renovation projects at multiple school locations.

NORTH PENINSULA JEWISH CAMPUS, Foster City, CA

Owner: North Peninsula Jewish Campus — Value: \$38,000,000

Description: Oversaw new construction of cultural arts center and school.

SAN BRUNO PARK SCHOOL DISTRICT, SAN BRUNO CA

Owner: San Bruno Park School district —Value \$ \$20, 000,000

Modernization of classrooms, sites and construction of 2 new classroom buildings for 1 Intermediate school and 7 elementary schools.

MORELAND SCHOOL DISTRICT, San Jose, CA

Owner: Moreland School District

Value: \$43.3 Million (combine both projects)

Description: New construction of classrooms and library buildings and remodel of 6 existing campuses – modernization of school sites, interior of classrooms and complete major solar project.

ROHNERT PARK CITY HALL, Rohnert Park, CA

Owner: City of Rohnert Park — Value: \$4,600,000

Description: Modernization and renovation of existing building to achieve LEED Gold Certification

HARMONY ECO-RESOURCE BUILDING, Occidental, CA

Owner: Salmon Creek School District — Value: \$3,300,000

Description: Completed new 8,000 sq. ft. LEED platinum multi-use building – recognized as the first LEED platinum certified school building in the country.

**Technology**

Timberline, WinEST, Primavera P6, SureTrak, Prolog; and MS Word, Excel, and Project

**Community Service**

St. Francis Solano School Advisory Committee, Sonoma, CA

Corte Madera Unified School District Programming and Design Committee, Larkspur, CA — volunteer consultant

# John Dilena

Senior Project Manager

---

Greystone West Company, Inc.  
Construction Management  
621 West Spain Street  
Sonoma, CA 95476

Office: 707.933.0624  
Cell: 707.888.1560  
Fax: 707.996.8390

john@greystonewest.com

---

Licensed General Engineering  
Contractor – A Classification

LEED AP

---

## Areas of Expertise

Construction Management

Estimating

Engineering

Cost Management Team

Leadership

Client/Customer Relations

Scheduling

Planning

Bidding

Negotiation

Subcontractor Relations

Problem Solving

## Technology

MS Office – Word, Excel,  
Power Point & Project  
SureTrak, Expedition,  
Prolog, ArchiCAD,  
Quicken, FileMaker Pro,  
Master Builder  
Pro Core, Primavera  
PlanGrid

## Professional Profile

Accomplished and goal-driven construction and project management professional with extensive portfolio of private and public projects for client list that includes municipalities, colleges, school districts, and various businesses. Adept in all project phases, quality take-offs, bid preparation/review, contracts, scheduling, project documents, and estimating.

Approach each project with a sound understanding of customer needs, expert skill set, and persistent attention to detail resulting in high levels of client satisfaction. Strong team management skills are evidenced by ability to meet deadlines without compromising design or internal relationships. Committed to completing every project on time and on budget. Excellent communication and negotiation skills.

## Selected Achievements

- Concurrently managed 3 projects at Aragon High School requiring skillful coordination between projects and other campus programs, diligent attention to security and safety, and ability to overcome a range of obstacles.
- As Project Manager for Kenridge Builders managed over \$40 million in various school and public projects. Selected projects include Santa Rosa Junior College, Shone Farm Agricultural Pavilion (\$5M) and Petaluma Campus-Phase R (\$4+M), and Woodland Community and Senior Center-Phase 2 (\$4M).
- Worked closely with various municipalities, contractors, design teams, and owners as Project Manager/Estimator on diverse range of aquatic projects.
- Directed LEED certification on multiple projects that include Rohnert Park City Hall.

## Professional History

**PROJECT MANAGER, GREYSTONE WEST COMPANY, INC.,** Sonoma, CA —5/2011 - present  
Successfully oversee project schedules, cost estimates, scope of work documents, equipment specifications, subcontractors, contracts, and field operations – often managing multiple projects simultaneously.

- Completed year-long Aragon High School gym and locker room project ahead of schedule and under budget. Project required extensive coordination between school personnel, contractors, and students; and temporary locker and training rooms to be constructed.
- Overcame multiple obstacles to complete Aragon H.S. CTE project on time and within budget despite additional excavation work and other obstacles.
- Completed new 2 story culinary arts and assisted development building at Burlingame High School at San Mateo Union High School District (SMUHSD). Project was within budget and delivered within schedule.
- Completed new 2 story building at Hillsdale High School (SMUHSD) consisting of steel framing utilizing conex brace frames. Project was delivered under budget and within schedule.

Other Projects include: Grant Aquatic Complex at Twin Rivers Unified School District (TRUSD), St Helena Aquatic Complex at Saint Helena Unified School District, Bay D Server Upgrade at the District Office (TRUSD), Aragon Civil Improvements (SMUHSD), Phase 1 Modernization at Neil Cummins Elementary school at Larkspur-Corte Madera School District (LCMSD), Phase 2 Modernization and New Construction at Neil Cummins Elementary School (LCMSD), Modernization Phase 1 & 2 & Window Replacement at Hall Middle School (LCMSD), New San Clemente Elementary School (LCMSD), New Construction at Cove Elementary School (LCMSD), New Multi-Purpose & Cafeteria at San Marin High School & Novato High School at Novato Unified School District (NUSD), New Multipurpose Building at San Ramon Elementary School (NUSD), New Gymnasium and Administration Buildings at Hamilton Elementary School (NUSD), HVAC and Classroom Modernization Phase 1 at Foothill Ranch Middle School (TRUSD), Paving Improvement Project at Grant High School (TRUSD), Kitchen Modernization Project at Grant High School (TRUSD), Synthetic Turf Replacement Project at Hillsdale High School (SMUHSD), Rio Linda Pool Renovation (TRUSD), Rancho Rinconada Pool Re-Plaster Project at Rancho Rinconada Recreation and Park District, Harmon Johnson Increment 2

Modernization (TRUSD), Burlingame HS Pool Replacement (SMUHSD), Terra Linda HS Innovations Hub (SRCS), Terra Linda HS Commons (SRCS), San Rafael HS MAC (SRCS), St. Helena ES HVAC (SHUSD), St. Helena ES Cafeteria (SHUSD).

**PROJECT MANAGER/ESTIMATOR, WATERWORKS INDUSTRIES, Windsor, CA — 2009 - 2011**

Ensured project schedule, price, industry standards, and end product were completed on time and within budget on range of aquatic projects.

*Selected water feature projects:* Niles Town Plaza, Brocade Offices (on N. First), 2550 Sand Hill Road (Menlo Park), Pittsburg High School, Promenade Shops at Orchard Valley. *Selected pool projects:* the spa at Public Health Services Hospital, YMCA Pool-China Town, and 4 pool project for the San Mateo Union High School District.

**SENIOR PROJECT MANAGER/ESTIMATOR, KENRIDGE BUILDERS, Rohnert Park, CA — 2004 - 09**

Managed overall project performance: scope, safety, quality, schedule, cost, and customer satisfaction. *Selected projects:* Rohnert Park City Hall, Novato High School, Vintage High School Swim Center, Grant and Valley Vista Elementary Schools, multi-site (5) school stage additions, San Jose Middle School, Sinaloa Middle School, and Anna Yates Elementary School.

**PROJECT MANAGER/ESTIMATOR, THOMPSON PACIFIC, INC., San Rafael, CA — 1999 - 2004**

*Selected projects: Project Manager* - Saratoga Public Library, Phase II (\$13M), Sunnyvale Senior Center (\$9.8M), and Armijo High School (\$5.5M). *Project Estimator* - Los Gatos High School (\$7M) and Saratoga High School (\$6.4M).

**Education & Certifications**

**B.S., Construction Management**, California State University Chico (2000)

Certificate in Lighting Water: Effects and Design Considerations



# Mikael Estrada

Project Manager

Greystone West Company, Inc.  
Construction Management  
621 West Spain Street  
Sonoma, CA 95476

Office: 707.933.0624  
Cell: 707.732.1828  
Fax: 707.996.8390

mikael@greystonewest.com

## AREAS OF EXPERTISE

Construction Management

Team Leadership

Customer Relations

Coordination

Field Supervision

Problem Solving

Project Startup

Project Closeout

Subcontractor Relations

Scheduling

Change Order Negotiations

## PROFESSIONAL PROFILE

Project Manager with over 19 years' experience in the construction industry. Skilled in managing projects, coordinating and managing contractors and subcontractors, and maintaining a comprehensive overview of projects.

Strong construction background. Fully versed in scheduling, submittals, subcontracts, RFI's, inspections, purchase and change order negotiations.

## SELECTED EXPERIENCE

- \$14+ million LEED Certified Roosevelt Community Center
- Oakland Technical High School Modernization
- \$17+ million Morgan Hill Indoor Recreation Center
- \$17 million LEED Certified De Anza College Science Center
- \$9 million Santa Cruz High School Modernization
- \$43+ million Bubb, Huff and Landels Elementary Schools Modernizations Phase 1-2
- \$10+ million Monta Loma Elementary School Modernization & Expansion Phase 3

## PROFESSIONAL HISTORY

### PROJECT MANAGER

**Greystone West Company, Inc.**, Sonoma, CA —2016 to present

Perform multiple functions to ensure Greystone West's success, growth, and reputation in public school construction.

- Negotiate contracts, subcontractor proposals, monitor schedules, and complete project closeouts.
- Oversee all phases of public school new building and renovation projects.
- Technical expert and resource, manage construction documentation and review of project plans, specifications, budget and scheduling

OWNER, **Estrada Construction**, Hayward, CA — 2011-2016

ASSISTANT SUPERINTENDENT, **West Coast Contractors**, Fairfield, CA — 2000-2011

## EDUCATION

Carpenters Union, Pleasanton Training Center, Graduated 2005 Journeyman

# Damien K. Lee

## Project Manager

Greystone West Company,  
Inc.

Construction Management  
621 West Spain Street  
Sonoma, CA 95476

Office: 707.933.0624  
Cell: 707.291.9311  
Fax: 707.996.8390

damien@greystonewest.com

## AREAS OF EXPERTISE

Construction Management

Team Leadership

Estimating

Procurement

Customer Relations

Scheduling

Value Engineering

Planning

Bid/Contract Preparation

Subcontractor Relations

Expenditure Reporting

Constructability &  
Facility Assessments

Budget Compilation

## PROFESSIONAL PROFILE

Skilled in managing project goals, coordinating and managing contractors and subcontractors, and maintaining a comprehensive overview of projects. Thorough knowledge of contracts and additional legal documents.

Highly organized, strong attention to detail, and precise in documentation. Team-oriented and customer focused. Commitment to the highest professional standards.

## SELECTED ACHIEVEMENTS

- Project Engineer/ Project Manager for the Marin County Office of Education, Shoreline Unified School District, Lagunitas School District, Larkspur School District, La Honda Pescadero Unified School District, San Mateo Union High School District, Laguna Joint Elementary School District, San Bruno Park School District & Novato Unified School District
- Managed projects and budgets totaling more than \$12 Million in value
- Maintained critical path schedules through consistently tight deadlines and dynamic circumstances

## PROFESSIONAL HISTORY

### PROJECT MANAGER

**Greystone West Company, Inc.**, Sonoma, CA —2017 to present

Perform multiple functions to ensure Greystone West's success, growth, and reputation in public school construction.

- Lead project teams, estimate projects, negotiate contracts, subcontractor proposals, monitor schedules, and complete project closeouts.
- Oversee all phases of numerous public school new building and renovation projects.
- Technical expert and resource.
- Led weekly construction meetings with client, contractor, architect and subcontractor personnel and maintained respective meeting minutes.
- Identified long-lead items, procurement issues and potential schedule problems.
- Performed a substantial amount of other duties as assigned, including data server migrations, development of renderings and website construction/maintenance.

### PROJECT ENGINEER/MANAGER

**Greystone West Company, Inc.**, Sonoma, CA —2005 to 2012

- Project Engineer/Manager for all phases of public school construction and public works projects.
- Managed projects through design development, construction and maintenance phases
- Developed budget and schedule projections and maintained each through project completion
- Managed public works bid openings, responded to Freedom of Information Act requests on client behalf

YARD MANAGER, **Echo Valley Ranch**, Auburn, CA — 2002-2005

## EDUCATION

Bachelor of Arts, Political Science, Hawaii Pacific University, 2014

Undergraduate Studies, California State University Chico, 2006-2009

## TECHNOLOGY

- Microsoft Office Suite
- Adobe Acrobat
- Sketchup 3-D Modeling
- Drupal User Interface
- Routine server maintenance, hard disk and operating system installation (corporate)



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

03/23/2020

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

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

|   |  |   |  |
|---|--|---|--|
| <b>PRODUCER</b><br>LARSON-CLARK INSURANCE ASSOCIATES<br>1155 Arnold Drive Ste C #332<br><br>Martinez CA 94553 |  | <b>CONTACT NAME:</b> Kathryn Larson<br><b>PHONE (A/C, No, Ext):</b> (925) 228-6300<br><b>E-MAIL ADDRESS:</b> kay@larsonclark.com<br><b>FAX (A/C, No):</b> (925) 228-6336                        |  |
| <b>INSURED</b><br>Greystone West Company<br>621 W Spain Street<br><br>Sonoma CA 95476                         |  | <b>INSURER(S) AFFORDING COVERAGE</b><br><b>INSURER A:</b> Mt. Hawley Insurance Company<br><b>INSURER B:</b><br><b>INSURER C:</b><br><b>INSURER D:</b><br><b>INSURER E:</b><br><b>INSURER F:</b> |  |
|   |  | <b>NAIC #</b><br>37974  |  |

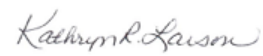
**COVERAGES****CERTIFICATE NUMBER:** CL2032301997**REVISION NUMBER:**

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

| INSR LTR | TYPE OF INSURANCE  | ADDL INSD                         | SUBR WVD   | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY)             | LIMITS                                 |
|----------|--|-----------------------------------|--|---------------|-------------------------|-------------------------------------|--|
| A        | <input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b><br><input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR<br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC<br>OTHER: |                                   |  | MGL0192503    | 03/21/2020              | 03/21/2021                          | EACH OCCURRENCE \$ 1,000,000           |
|          |  |                                   | DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 |               |                         |                                     |  |
|          |  |                                   | MED EXP (Any one person) \$ 5,000                    |               |                         |                                     |  |
|          |  |                                   | PERSONAL & ADV INJURY \$ 1,000,000                   |               |                         |                                     |  |
|          |  |                                   |  |               |                         | GENERAL AGGREGATE \$ 2,000,000      |  |
|          |  |                                   |  |               |                         | PRODUCTS - COMP/OP AGG \$ 2,000,000 |  |
|          |  |                                   |  |               |                         |                                     | \$                                     |
| A        | <b>AUTOMOBILE LIABILITY</b><br><input type="checkbox"/> ANY AUTO<br><input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS<br><input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY  |                                   |  | MXL0431125    | 03/21/2020              | 03/21/2021                          | COMBINED SINGLE LIMIT (Ea accident) \$ |
|          |  |                                   | BODILY INJURY (Per person) \$                        |               |                         |                                     |  |
|          |  |                                   | BODILY INJURY (Per accident) \$                      |               |                         |                                     |  |
|          |  |                                   | PROPERTY DAMAGE (Per accident) \$                    |               |                         |                                     |  |
|          |  |                                   |  |               |                         | \$                                  |  |
| A        | <input type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> <b>EXCESS LIAB</b><br><input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE<br>DED RETENTION \$   |                                   |  | MXL0431125    | 03/21/2020              | 03/21/2021                          | EACH OCCURRENCE \$ 3,000,000           |
|          |  |                                   | AGGREGATE \$ 3,000,000                               |               |                         |                                     |  |
|          |  |                                   |  |               |                         |                                     | \$                                     |
|          | <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b><br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)<br>If yes, describe under DESCRIPTION OF OPERATIONS below  | Y / N<br><input type="checkbox"/> | N / A  |               |                         |                                     | PER STATUTE OTH-ER                     |
|          |  |                                   | E.L. EACH ACCIDENT \$                                |               |                         |                                     |  |
|          |  |                                   | E.L. DISEASE - EA EMPLOYEE \$                        |               |                         |                                     |  |
|          |  |                                   | E.L. DISEASE - POLICY LIMIT \$                       |               |                         |                                     |  |

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

**CERTIFICATE HOLDER****CANCELLATION**

|  |  |
|--|--|
| Greystone West Company<br>621 West Spain Street<br><br>Sonoma CA 95476 | <b>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.</b><br><br><b>AUTHORIZED REPRESENTATIVE</b><br> |
|--|--|

© 1988-2015 ACORD CORPORATION. All rights reserved.

## CERTIFICATE OF INSURANCE

This certificate is issued for informational purposes only. It certifies that the policies listed in this document have been issued to the Named Insured. It does not grant any rights to any party nor can it be used, in any way, to modify coverage provided by such policies. Alteration of this certificate does not change the terms, exclusions or conditions of such policies. Coverage is subject to the provisions of the policies, including any exclusions or conditions, regardless of the provisions of any other contract, such as between the certificate holder and the Named Insured. The limits shown below are the limits provided at the policy inception. Subsequent paid claims may reduce these limits.

|  |   |
|--|---|
| <b>Certificate Holder:</b><br>FORD MOTOR CREDIT COMPANY (RETAIL)<br>PO BOX 390910<br>MINNEAPOLIS, MN USA 554390910 | <b>Named Insured:</b><br>GREYSTONE WEST COMPANY<br>621 W SPAIN ST<br>SONOMA CA 95476-5920 |
|--|---|

| Automobile Liability  |  |                 |   |   |   |
|---|--|-----------------|---|---|---|
| <b>Insurer Name:</b> Allstate Insurance Company   |  |                 |   |   |   |
| <b>Policy Number:</b> 648504105   |  |                 |   |   |   |
|   | 1 -- Any Auto                                      |                 | 2 -- Owned Autos Only                     |   | 3 -- Owned Priv. Pass. Autos Only               |
|   | 4 -- Owned Autos Other Than Priv. Pass. Autos Only |                 | 5 -- Owned Autos Subject to No Fault      |   | 6 -- Owned Autos Subject to a Compulsory UM Law |
| X   | 7 -- Specifically Described Autos                  | X               | 8 -- Hired Autos Only                     | X | 9 -- Nonowned Autos Only                        |
| <b>Policy Effective Date :</b> 07-26-2020   |  |                 | <b>Policy Expiration Date:</b> 07-26-2021 |   |   |
| <b>Limits of Insurance:</b>   | \$2,000,000  |                 | Combined Single Limit (each accident)     |   |   |
|   | BI Per Person                                      | BI Per Accident | PD Per Accident                           |   |   |
| Description of Operations/Locations/Vehicles/Endorsements/Special Provisions  |  |                 |   |   |   |
|   |  |                 |   |   |   |
| <b>Interested Party Type:</b> Loss Payee  |  |                 |   |   |   |
| THIS CERTIFICATE DOES NOT GRANT ANY COVERAGE OR RIGHTS TO THE CERTIFICATE HOLDER.<br>IF THIS CERTIFICATE INDICATES THAT THE CERTIFICATE HOLDER IS AN ADDITIONAL INSURED, THE POLICY(IES) MUST EITHER BE ENDORSED OR CONTAIN SPECIFIC LANGUAGE PROVIDING THE CERTIFICATE HOLDER WITH ADDITIONAL INSURED STATUS. THE CERTIFICATE HOLDER IS AN ADDITIONAL INSURED ONLY TO THE EXTENT INDICATED IN SUCH POLICY LANGUAGE OR ENDORSEMENT. |  |                 |   |   |   |

|                                     |                       |
|-------------------------------------|-----------------------|
| <b>Producer:</b><br>LEHR INS AGENCY | <b>Date:</b> 05-12-20 |
| <b>Authorized Representative:</b>   |                       |



# San Mateo Union High School District

Kevin Skelly, Ph.D., Superintendent

Elizabeth McManus, Deputy Superintendent Business Services

Kirk Black, Ed.D., Deputy Supt. Human Resources & Instruction

KindyLee Mackamul, Associate Superintendent Student Services



November 30, 2017

To Whom It May Concern:

The purpose of this letter is to offer my support to the construction management application of **Greystone West** to your district. I am now entering my eleventh year as a school superintendent and my twenty-sixth year in school administration. During this time I have worked with many different construction management companies and Greystone has been the best in terms of effective communication, overall competence, and technical skills.

Greystone has been the construction management firm for the San Mateo Union High School District (SMUHSD) for the past 10 years. When I joined the district in the fall of 2015, the district had completed hundreds of millions of dollars of construction but still had some important decisions to make including the delicate issue of a new district office. Greystone helped us develop the rationale for this building, the size of the project, and how this fit with other priorities for the district's limited bond funds. They have also provided imaginative thinking on another potential project – construction of staff housing on one of our campuses so we can attract and retain the best staff. Under the direction of Todd Lee and other senior management, our district enjoys the support of the community as we move forward on this and other complicated projects.

Before I came to the SMUHSD, I served as the interim superintendent of the Mountain View Whisman School District (MVWSD) for six months. This was a crucial time for the district as it faced multiple issues around school size, boundaries, school site placement, and the need for a construction master plan for its elementary schools grounded in fiscal reality. Greystone was there and served as a stabilizing force while the district was buffeted by board infighting, a fairly acrimonious superintendent and CBO departures. Todd Lee and his colleagues helped the district through this turbulence and the district is now on a reasonable course forward.

Throughout my work with Todd and other senior Greystone management I have been consistently inspired by their passion for the work and their ability to communicate hard messages based on facts. They give and take suggestions easily. Their knowledge about construction and DSA approval is unmatched. Finally, they are good people who are easy to work with. There may be firms with more flair, but I have not encountered more competent, decent folks in their line of work.

Construction projects are dangerous places for district leaders and school boards. The potential pitfalls are many. In this work it is crucial to build a competent team. I feel fortunate indeed to have worked with Greystone West on this work. You will be as well.

Sincerely,

Kevin Skelly, Ph.D.  
Superintendent



## BOARD OF TRUSTEES

Jeff Conwell

Maria Haug

Jeannie Kerr

Lisa Pelosi

Cynthia Smith

August 8, 2017

## DISTRICT ADMINISTRATION

Marylou Wilson, Ed.D.  
SUPERINTENDENT

Chris Heller  
CHIEF ACADEMIC/  
HUMAN RESOURCES OFFICER

Andrea Stubbs  
CHIEF BUSINESS OFFICIAL

To Whom It May Concern,

It is with great pleasure and enthusiasm that I write this letter of recommendation for Greystone West and the owner, Todd Lee. Currently, I hold the position of superintendent of St. Helena Unified School District where Greystone has served in the capacity of construction manager since 2011. I believe I am uniquely qualified to provide you with a working reference for the company and their excellent work.

We are a small district with very few employees. When bonds were passed prior to my joining the district, there was no capacity from within to manage the 60+ million dollars of facility projects. Greystone West was hired and immediately went to work ensuring projects were on time and within budget. When I joined the district in 2014, there was a bit of turmoil and unrest. Within six months changes within the executive cabinet could have brought our construction projects to a screaming halt. In fact, due to the persistence and tenacity of Todd Lee, our projects picked up speed and were completed in a timely fashion. Additionally, the overall bond projects came within 1% of the approved budget.

Our bond projects are now complete, however, we have a number of deferred maintenance projects scheduled within the next few years. Todd Lee has been instrumental in assisting staff in the development of a long-term plan that include "warm, safe, and dry" aspects of all of our facilities. Though the next few projects are smaller in scale, we are continuing our contract with Greystone West.

Greystone West is led by a skilled construction manager, Todd Lee. He seeks to understand the needs and desires of the district and then meets them with flying colors. Mr. Lee is available, visible, and flexible. He composes board agenda language and attends all necessary board meetings. Mr. Lee works diligently to ensure that the Board is informed of all aspects of each item. Board members report to me regularly that they appreciate his work, his candor, and his willingness to do whatever it takes to get the job done.

Mr. Lee is an effective communicator and one that is trusted. I enjoy working with Todd Lee and provide you with the highest of recommendations. If you would like to discuss Greystone West and Todd Lee further, do not hesitate to contact me.

Sincerely,

Dr. Marylou Wilson, Superintendent





**Board of Trustees**

*Michelle Rivas*  
*President*

*Linda Fowler, J.D.*  
*Vice President*

*Michael Baker*  
*Member*

*Bob Bastian*  
*Member*

*Basim Elkarra*  
*Member*

*Ramona Landeros*  
*Member*

*Rebecca Sandoval*  
*Member*

**Superintendent**  
*Steven Martinez, Ed.D.*

*To inspire each student to  
extraordinary achievement  
every day*

July 17, 2017

To Whom It May Concern:

RE: Letter of Recommendation for Greystone West Company, Todd Lee & Team

It is with great satisfaction that I write this letter of recommendation for Greystone West Company and Todd Lee. I have worked with Greystone West Company ("GWC") since 2011 in two school districts: St. Helena Unified and Twin Rivers Unified. In both districts, Todd and GWC were the districts' go-to construction managers to ensure successful construction projects.

Starting with St. Helena High School facility improvement projects which included 25,000 square feet of new construction to our 27 state modernization projects in Twin Rivers, GWC has never let us down. GWC is great at project setup and cost estimation (I should have taken Todd's estimate over the architect's every time). Project management with outstanding monthly reports during all phases of construction during and through closeouts is GWC's strongest asset as a company. For a small district like St. Helena, GWC did everything from A to Z for us. For a large district like Twin Rivers, GWC fits nicely where we needed extra support.

Finally, Todd Lee and GWC are individuals with integrity and incomparable work ethics. Todd Lee has never not completed something I have asked for (and if you know me, those tasks are many and some difficult to achieve).

I give my highest recommendation to Todd Lee and Greystone West Company.

Please contact me at 916-566-1709 if I can provide additional information.

Sincerely,

A blue ink handwritten signature, appearing to read "Bill McGuire", is written over a horizontal line.

Bill McGuire  
Deputy Superintendent



QUATTROCCHI KWOK  
ARCHITECTS

27 January 2017

To Whom It May Concern;

It is with great interest and enthusiasm that I offer this letter of recommendation to Greystone West and particularly for principal Todd Lee. I run a 50-person architectural firm where our primary business is educational facilities. In my capacity I have worked with dozens of Construction Managers from sole practitioners to national corporations that offer full program management services. Without exception the depth of services and client responsiveness of Mr. Lee and the staff of Greystone West are the best.

My construction management experiences with Todd Lee started over 16-years ago with a 15-campus district experiencing significant political and facility issues including long-term master planning, consolidation, grade level reconfiguration, deteriorating buildings and a need for new facilities. More recently I am working with Todd and the staff of Greystone West on a large high school district in the midst of a multi-year \$200 million plus program that includes facility master planning and budgeting provided by Greystone West.

What impresses me the most is the depth of services offered by Greystone West. In the case of the high school district, Todd lead a comprehensive and thorough facility assessment for each campus that provided facility needs, budgets and schedules. Now several years into the design process it is uncanny the accuracy of their projected facility needs, budgets and schedules. Without exception each project remained on Todd's initial budgets – despite the natural changes a district seeks once the design process commences. I've come to respect and seek Todd's counsel as the district's Construction Manager. I cannot begin to describe the difficulties I've encountered on other projects where the CM provided inaccurate budget and schedule projections. The respect shown by district staff and the Board of Trustees is testament to the quality of Greystone West's work

One of the attributes that sets Greystone West apart is their ability to provide a range of services specifically tailored to the district's needs. So many CM firms offer a one size fits all approach, while

636 Fifth St.  
Santa Rosa, CA  
95404  
P: 707.576.0829  
F: 707.576.0295  
A California Corporation

[www.qka.com](http://www.qka.com)



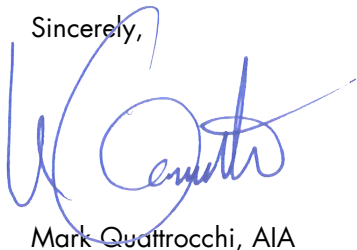
Greystone West looks at the specific needs of their clients and provides only the expertise needed. I saw this first hand with the districts I worked on with Todd. Not only is this an opportunity for a district to efficiently use their funds, it avoids duplication of services.

What sets Todd Lee and Greystone West apart from others is his ability to bring people together in the service of the task at hand. On our many projects together, Todd's leadership kept us focused, never discouraged and always striving for the solution that is best for the District. As an example, Greystone West and QKA worked on a multi-phased high school renovation with highly involved teacher groups with vastly different interests and goals. Through regular site meetings, communication, involvement of the principal and careful project prioritization, Todd navigated through this difficult process to a highly successful end.

On a number of occasions I saw Todd provide district requested expertise in areas not provided by other construction managers. This includes delicately working with trade unions on a Project Labor Agreement previously set up by the district, working with bond and legal council on accessed valuation issues, and providing insight on the projected cost increases by particular subcontractors or materials. Supplementing this with traditional CM services - including constructability reviews, value engineering, project management, contractor negotiations and change order evaluation - makes Greystone West an invaluable team member for any district.

I absolutely unequivocally recommend Greystone West to any school district. If I can be of further assistance, please do not hesitate to call.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Mark Quattrocchi', is written over the word 'Sincerely,'.

Mark Quattrocchi, AIA