

BEAM PROFESSIONALS

ROOFING CONSULTANT SERVICES

PALOS VERDES PENINSULA UNIFIED SCHOOL DISTRICT ■ RFP PS024-010820 ■ FEBRUARY 5, 2020

Cover Letter

FEBRUARY 5, 2020



ROOF CONSULTING
BUILDING ENVELOPE
+ WATERPROOF
CONSULTING FORENSIC
INVESTIGATION INDOOR
AIR QUALITY

Palos Verdes Peninsula Unified School District
38 Crest Road West
Rolling Hills, CA 90274
ATTN: Brenna Terrones, Director of Purchasing

**RE: REQUEST FOR PROPOSAL FOR PVPUSD ROOFING CONSULTANT
SERVICES, RFP#PS024-010820**

Dear Brenna Terrones and Selection Committee,

On behalf of the entire BEAM Professionals team, we would like to thank you for allowing BEAM Professionals the opportunity to assist Palos Verdes Peninsula Unified School District (PVPUSD) with roofing consultant services, comprehensive roof asset management survey, complete site investigations, testing, construction/bidding documents, construction quality assurance, and maintenance and operation education. Based on our understanding of your needs, objectives, and timing, this proposal will address, but not limit itself to the following phases of the project:

- | | |
|------------------|--|
| Phase I | Roof Inspection / "Scope of Work" Evaluation |
| Phase II | Construction Document Preparation / Bidding |
| Phase III | Construction Quality Assurance / Project "Close-Out" |
| Phase IV | Maintenance and Operation Education |

Firm Overview

BEAM Professionals has over 20 years of experience dedicated to educational, corporate, commercial, private and public planning and design. Over the last three decades, BEAM has had the privilege of completing over 2.8 billion square feet of roofing and waterproofing replacement and repair along with providing building envelope consulting services for a variety of clients. No matter the size of the project, we treat every client with equal importance, and we encourage PVPUSD's representatives to contact any of our references to hear firsthand about our passion and commitment to our customers.

Statement of Interest & Qualifications

BEAM Professionals would be honored to have the opportunity to develop a working partnership with PVPUSD. We understand all of the elements in the RFP and have reviewed and agree to all terms stated, taking no exception to the terms and conditions of the standard agreement. Our Costa Mesa office offers the unique combination of resources — relevant team experience, a proven commitment, and key individuals — to serve PVPUSD regarding the repairs and re-roofing projects that will take place at PVPUSD during the 2020 summer break.

Once again, thank you for considering BEAM to assist with your roofing consultant needs. Our team stands poised and ready to roll up our sleeves to assist PVPUSD with this significant and high-priority project. In the interim, if you have any questions or would like to discuss further, please do not hesitate to contact me at (972) 310-4724.

Respectfully,

Shawn LeCrone, RRO, REWO, CD
Vice President, **BEAM Professionals**
Shawn.Lecrone@beamprof.com
Mobile: 972-310-4724

Shawn LeCrone is an authorized officer of the organization, who has legal authority in such transactions.

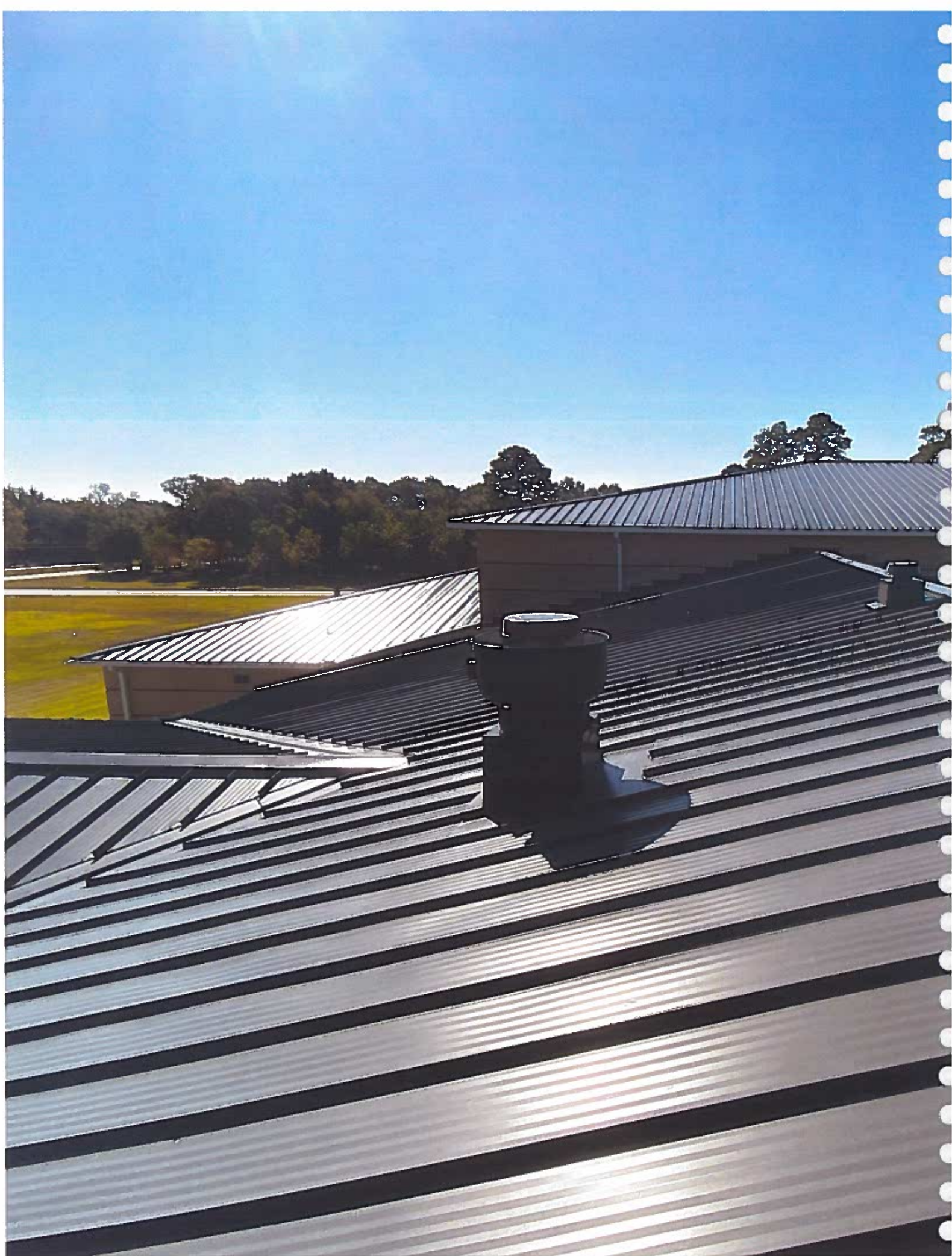


Table of contents



TABLE OF CONTENTS

I	COVER LETTER pp. 01 - 02
II	TABLE OF CONTENTS
III	BACKGROUND AND EXPERIENCE pp. 03 - 12
IV	SCOPE OF SERVICES pp. 13 - 16
V	REQUIRED FORMS (EXHIBIT A) pp. 17 - 22
VI	ACKNOWLEDGMENT OF ADDENDA pp. 23 - 28
VII	RFP PRICE FORM pp. 29 - 30

Background
&
Experience



III. BACKGROUND AND EXPERIENCE



WHO WE ARE

BEAM Professionals (a PBK Company) has more than 30 years of experience in the design and maintenance of exterior building envelope components for K-12, higher education, municipalities, corporate + commercial, and sports clientele.

We ensure proper design, construction, and coordination between various building envelope components. Our services assist in preventing water and air from penetrating the building envelope, as well as moisture condensation within. This ensures that each system is addressed in respect to material durability, system maintenance, thermal performance, moisture/air protection, and code compliance.

BEAM Professionals has been working with clients and contractors to stop mother nature, the forces of gravity, air currents, capillary suction, surface tension, kinetic energy, air pressure, and hydro static pressure to create weather-tightness for our clients' most precious assets, their buildings. Services we provide include:

- Exterior visual examination of all roof-related membrane and sheet metal flashing, projections, and roof deck assemblies
- Exterior visual examination of waterproof integrity of vertical wall assemblies and entire facilities
- Evaluation of nearby construction patterns for standards of care concerns
- Examine problematic conditions and locations
- Design and production of construction documents
- Roof survey report and needs analysis
- Photographic logs

OFFICE LOCATIONS

Our company consists of a network of eight offices across California (Cost Mesa, Ontario, San Diego, Oxnard, Fresno, San Luis Obispo, Pleasanton and Sacramento) and seven offices across Texas. Our team offers a unique combination of resources: local presence, relevant experience, a proven track record, knowledge of large commercial infrastructure facilities, commitment, and proximity to PVPUSD.

BEAM knows buildings. The scope of our projects range from \$10,000 to \$100,000,000 — no project is too small or too large. Our California team members are dedicated building envelope experts who will lead you through each step of the assessment and estimation processes.

*Our passion is performance
— at every level. BEAM's
design solutions provide
clients with flexible
and adaptive building
integration guidelines
and tools to maximize
operational efficiency,
environmental responsiveness
and end-user achievement.*



Piner High School

BEAM understands that our success is determined exclusively by our clients and by the choice we make to consistently exceed their expectations. Every aspect of our firm, from selection of personnel to design methods, has been strategically planned to respond to the specific needs of our clients. We don't take a "one size fits all" approach — we have a personal and local stake in seeing to it that your structures are properly assessed. We have the expertise you need, and we are right in your backyard.



DISTRICT-WIDE ROOF REPLACEMENT & REPAIR

TWIN RIVERS USD II SACRAMENTO, CA



KEY STAFF MEMBERS

Shawn LeCrone, Vice President
Todd Denhalter, Project Manager
David Renteria, Construction Manager

COMPLETION

Ph I: 2016
Ph II: 2017

BEAM Professionals provided design and construction administration services and building envelope observation for the District-wide roof replacement and repair. The project's scope involved repair and/or replacement of leak-prone roof systems to provide long-term water-tight buildings at each of the campuses. The new roofing incorporates a Title 24 energy compliance with new Energy Star rated material that is approved by the Cool Roof Rating Council.

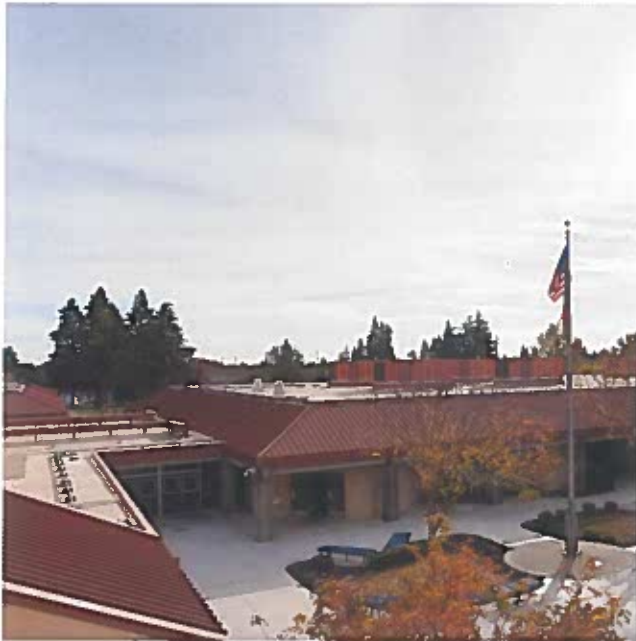
DISTRICT REFERENCE

Bill McGuire
Deputy Superintendent
p: 916-566-1709
e: bill.mcguire@twinriversusd.org

III. BACKGROUND AND EXPERIENCE

DISTRICT-WIDE BUILDING ENVELOPE ASSESSMENT

MODESTO USD II MODESTO, CA



KEY STAFF MEMBERS

Shawn LeCrone, Vice President
Todd Denhalter, Project Manager
David Renteria, Construction Manager
Genevieve Alegre, Project Coordinator

COMPLETION

2020

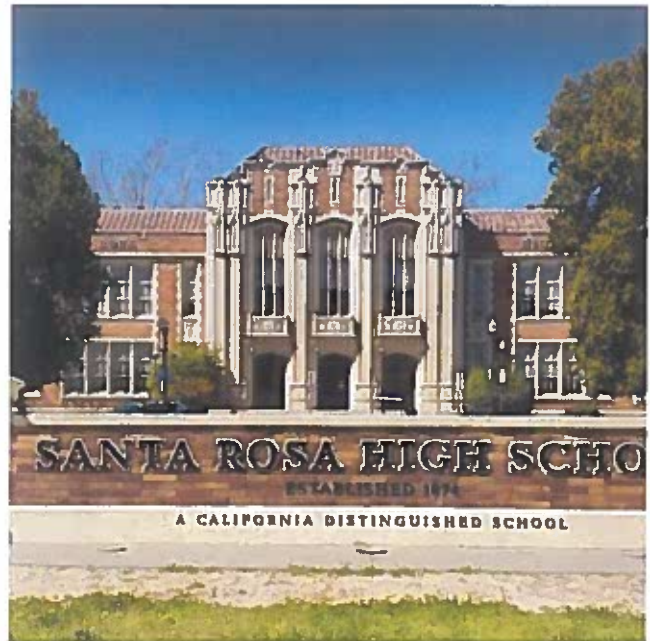
BEAM Professionals provided a **District-Wide Building Envelop Assessment for Modesto USD**. It included review of historical building and roof system data that included building size, building age, roof system/structure type, date of installation and/or repair, and work order leaks. The exterior, visual examination of all roof-related membrane and sheet metal flashing, penetrations and projections, and roof mat/deck assemblies. There were detailed, site-specific reports prepared for each facility to include a description of the existing conditions observed; current roof system type; anticipated remaining useful life of the current roof system(s); etc.

DISTRICT REFERENCE

Roger Orth
Senior Director, Maintenance and Operations
p: 209-574-1618
e: orth.r@monet.k12.ca.us

ROOF AND HVAC REPLACEMENT, PHASE I

SANTA ROSA CITY SCHOOLS II SANTA ROSA, CA



KEY STAFF MEMBERS

Harold Stephens, President
Shawn LeCrone, Vice President
David Renteria, Construction Manager
Genevieve Alegre, Project Coordinator

COMPLETION

2018

BEAM Professionals provided design and construction administration for **Santa Rosa City District** to remove the leak-prone roof systems on the original Administration building dating back to the late 1800s, which included the original Roman S Clay tile roof. The new roof system incorporated Title 24 compliant roof systems with Energy Star rated material approved by the Cool Roof Rating Council and reinstallation of the original Clay Roof Tiles. Additionally, the outdated HVAC system was also replaced with energy efficient equipment and ductwork.

DISTRICT REFERENCE

Michael Braff
Director of Facilities
p: 707-890-3800
e: mbraff@srcs.k12.ca.us

DISTRICT-WIDE ROOF REPLACEMENT & REPAIR

WESTMINSTER USD || WESTMINSTER, CA



KEY STAFF MEMBERS

Shawn LeCrone, Vice President

David Renteria, Construction Manager

COMPLETION

In Progress

BEAM Professionals is providing services to **Fryberger Elementary School** that will include district-wide roof replacement & repair to existing facilities and selective accessible upgrades.

DISTRICT REFERENCE

Tony Wold

Assistant Superintendent, Business Services

p: 714-894-7311

e: twold@wsdk8.us

FACILITIES ROOF ASSESSMENT, REPLACEMENT & REPAIR

LONG BEACH USD || LONG BEACH, CA



KEY STAFF MEMBERS

Shawn LeCrone, Vice President

David Renteria, Construction Manager

COMPLETION

2019

BEAM Professionals is providing services for **Jefferson Leadership Academy** for HVAC in all occupied spaces and modernization of four existing single-story buildings and three, two-story buildings to provide access compliance along with roof replacement at building 600 and repairs to each building on the campus as needed.

DISTRICT REFERENCE

Jacquelyn Roberts

Project Manager

p: 562-997-7550

e: jroberts@lbschools.net

III. BACKGROUND AND EXPERIENCE

FACILITIES ROOF ASSESSMENT, REPLACEMENT & REPAIR

LONG BEACH USD II LONG BEACH, CA



KEY STAFF MEMBERS

Shawn LeCrone, Vice President

COMPLETION

In Progress

BEAM Professionals is providing professional services for 38,000 square feet of facilities roof assessment, replacement & repair to (4) single story buildings at **Kettering Elementary**. The modernization included selective accessible upgrades and classroom technology upgrades to each building with roof replacement at mechanical wells and repairs as needed at remaining roof areas.

DISTRICT REFERENCE

Jacquelyn Roberts
Project Manager
p: 562-997-7550
e: jrroberts@lbschools.net

CONSULTING EXPERTISE

Once the initial site investigation is completed, BEAM Professionals will then work on establishing a scope of work, which could be a full replacement of the failing system, or maintaining the building envelope integrity. Through the process, we prepare construction documents, create pre-proposals and attend proposal conferences, review submittals, provide construction quality assurance, and perform final inspection and project closeout.

Our team is capable of also providing roof management programs through Microsoft Access since it is compatible with most of our clients' existing applications.

ROOFING AND BUILDING ENVELOPE SERVICES

Building Envelope Asset Management (BEAM) Professionals have specialized expertise in roofing, waterproofing, exterior building envelope, and forensic investigation. BEAM has more than 30 years dedicated to providing a high-level of service to a diverse range of educational institutions, and they have a strong reputation for service excellence and delivering viable solutions that are financially responsive.

Roof Consulting Services

- Establish a scope of work- roof replacement or maintenance
- Preparation of construction documents
- Pre-proposal and proposal conference
- Review of submittals
- Construction quality assurance
- Final inspection & project closeout

Building Envelope & Waterproofing Consulting Services

- Roof inspection
- Exterior wall/window inspection Storm damage assessment
- Roof management program

Forensic Investigations

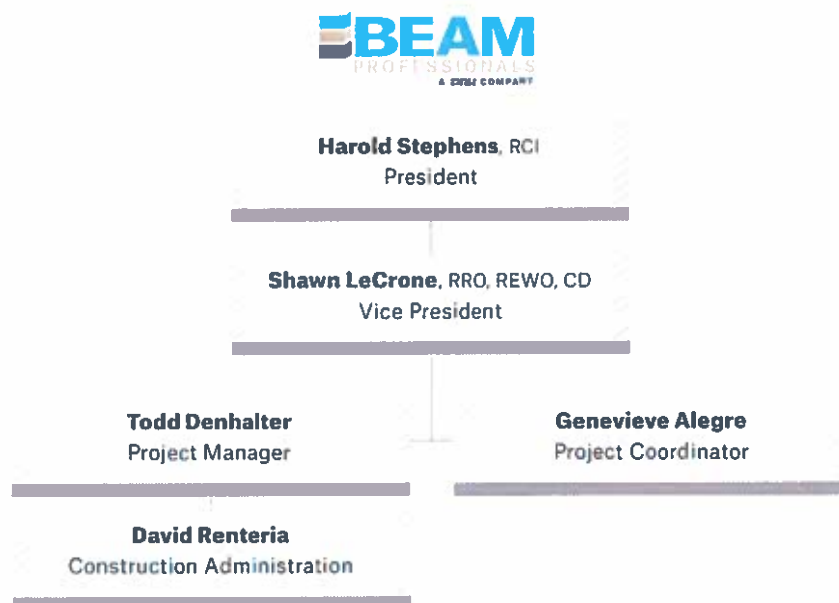
- Destructive core sampling Moisture analysis
- Thermal "infrared" analysis Wind up-lift resistance analysis
- Drainage evaluations
- Wall cavity investigations Digital roof system uplift assessment

Indoor Air Quality

- Interior & exterior surveys
- Preparations of remediation & build back documents

STAFF MEMBERS

Our team organization chart below illustrates our proposed key team personnel who will assist you with the repairs and re-roofing projects that will take place at PVPUSD during the 2020 summer break. The key personnel identified below will be involved throughout the life of the project. We will utilize a cohesive team from project kick-off to closeout.



HAROLD STEPHENS

PRESIDENT



As President of BEAM Professionals, Harold oversees all services in California and Texas regions. He has experience assessing building types for corporate, K-12, higher education, and healthcare clients. Harold has extensive knowledge in all types of building envelope systems. His unique insight has proven valuable for the long-term durability and maintenance of our clients' facilities across the US. As President of BEAM Professionals, he performs as BEAM's day-to-day service champion and senior client executive in charge of the successful execution of each assigned project.

EDUCATION

Acuity Training Institute
Roofing Industry Educational
Institute, Continuing Education
Roofing Consultants Institute (RCI)
Continuing Education

AFFILIATIONS

Member, Institute of Roofing,
Waterproofing, & Building
Envelope Professionals (RCI)
National Roofing Contractors
Association (NRCA)

EXPERIENCE

Santa Rosa City Schools

Santa Rosa Roof
Assessment
Piner High School
Maria Carrillo High
School
Elsie Allen High School
Santa Rosa High School
Phase I
Hilliard Comstock
Middle School

Albert Biella Elementary

James Monroe
Elementary School
Hidden Valley
Elementary School

Twin Rivers Unified School District

Twin Rivers Roof
Assessment

City of Angleton Courthouse

Addition Assessment

City of Pearland

Recreation Center
& Natatorium

Coca Cola Corporation

Corpus Christi
Assessment Report

ECOM Real Estate

Stone Tower Partial Roof
Replacement Phase I & II

Farrell-Aramco

Airport Hangar

III. BACKGROUND AND EXPERIENCE

SHAWN LECRONE RRO, REWO, CD VICE PRESIDENT



Shawn has over 15 years of professional experience in the building envelope and roofing industry including consulting, assessment, contracting, project management, designing, and planning. He has extensive knowledge in assessing building types for large commercial, corporate, multi-family, K-12, higher education, and healthcare clients. As Vice President, he performs as BEAM's day-to-day service champion and senior client executive.

EDUCATION

Associates Degree, Occupational Studies, IntelliTec College

REGISTRATIONS

Registered Roof Observer, #RRO-1034

Registered Exterior Wall Observer, #REWO-0046

American Design Drafting Association, Certified Draftsman

PROFESSIONAL AFFILIATIONS

Member, IIBEC (International Institute of Building Enclosure Consultants)

EXPERIENCE

San Marcos USD

District-Wide Needs Assessment

Modernization with Building Envelope Saddleback Valley USD

Portola Hills Elementary School, Phase I & II

Lake Forest Elementary School

Galt Joint Unified ESD

River Oaks Elementary School

Long Beach USD

Kettering Elementary School

Jefferson Tech Academy

Will Rogers Middle School

Wilson High School

Mann Elementary School

Bixby Elementary School

Lowell Elementary School

Naples Elementary School

Roof Replacements

Santa Rosa City Schools

Albert Biella Elementary School

District-Wide Roofing Assessments

Elsie Allen High School

Foothill Ranch Middle School

Garden Valley Elementary School

Herbert Slater Middle School

TODD DENHALTER PROJECT MANAGER



Todd has been a leader in the industry. His real world experience adds to his obsessive customer service. Todd's experience includes roof design, service management, inspections, assessments, value engineering, and project management. Throughout his career, Todd has worked on many high profile jobs in one capacity or another. Todd works hand-in-hand with building owners, property managers, developers, real estate agents, home owner associations, general contractors, and large commercial and industrial projects to help guide them in a direction that is beneficial to the client's needs.

EDUCATION

Heald College

Grand Canyon University

EXPERIENCE

Modesto City School District

District-Wide Building Envelope

Placerville Unified School District

District-Wide Building Envelope

Twin Rivers Unified School District

Roof Replacement

GENEVIEVE ALEGRE**PROJECT COORDINATOR****EDUCATION**

Bachelor of Science, Business Administration, Sales and Marketing, DeVry University

AFFILIATIONS

Society for Marketing Professional Services (SMPS), Sacramento

Genevieve has more than 10 years of experience as a project coordinator and operations management support in the construction industry. She has worked alongside architectural, engineering, and building envelope consultants, facilitating and coordinating schedule milestones and deliverables for various educational, commercial, and infrastructure projects.

EXPERIENCE

Long Beach USD
Bixby Elementary School
HVAC

Jefferson Academy
HVAC

Rogers Middle School
HVAC

Wilson High School
HVAC

Palm Springs USD
Desert Hot Springs High School CTE Building

Val Verde USD
District Office
Modernization

Plumas USD

Quincy Elementary
School Class Building
Modernization

Quincy Junior High
School Modernization

Westminster USD
Fryberger Elementary
School HVAC &
Modernization

Hayden HVAC &
Modernization

Meairs Elementary
School & Modernization

Twin Rivers USD

Woodridge Elementary
School Emergency Roof
Replacement

Grant Union High
School Fire Damage
Repair

MLK Jr. Tech Academy
Roofing

Pacific Career &
Tech High School
Modernization

**DAVID RENTERIA****CONSTRUCTION ADMINISTRATION****EDUCATION**

Shasta College
EMT II License

Chabot College
EMT II License

CERTIFICATIONS

Journey Level in Roofing
EMT II License

California Real Estate License

David Renteria has more than 10 years of professional experience providing roofing, waterproofing, and building envelope services. David's experience includes commercial properties, HOAs, public infrastructure, and educational facilities. David also has experience in real estate including escrow/title and has a complete understanding of the logistics and process of real estate acquisitions.

EXPERIENCE**Kaiser Permanente**

San Leandro

Oakland

San Francisco

Sacramento

Oracle

Georgia Pacific
Portland Facility

Blue Diamond Growers

Oakdale Annex

AT&T

Oakland

San Francisco

San Carlos

PG&E**Davis**

Oakland

San Francisco

Building Envelope Assessments

Diablo Valley College

UC Berkeley

Santa Rosa City
Schools

Twin Rivers USD

Incline Property
Management

Barbers Hill ISD

Beaumont USD

Clear Creek ISD

Chambers County

Conroe ISD

Dickinson ISD

Galena Park ISD

Klamath Trinity JUSD

Lamar Institute of
Technology

Long Beach USD

Plumas USD

Port Arthur SD

III. BACKGROUND AND EXPERIENCE

PUBLIC SECTOR CLIENTS

BEAM has become one of the most, if not the most, experienced building envelope firm in the country. Below is a list of our current public sector clients.

California

Burnt Ranch Elementary
School District
Galt Joint Unified
Elementary School District
Glenbrook Cottage &
Townhome Association
Incline Property
Management
Klamath-Trinity Joint
Unified School District
Mountain Valley Unified

School District
Plumas Unified School
District
Santa Rosa City Schools
Twin Rivers Unified School
District

Texas

Birdville ISD
Dallas ISD
Ector County ISD
El Paso ISD

Fort Worth ISD
Garland ISD
Glen Rose ISD
Plano ISD
Richardson ISD
Wylie ISD

REFERENCES

TWIN RIVERS USD || SACRAMENTO, CA

Bill McGuire
Deputy Superintendent
p: 916-566-1709
e: bill.mcguire@twinriversusd.org

MODESTO USD || MODESTO, CA

Roger Orth
Senior Director, Maintenance and Operations
p: 209-574-1618
e: orth.r@monet.k12.ca.us

SANTA ROSA CITY SCHOOLS || SANTA ROSA, CA

Michael Braff
Director of Facilities
p: 707-890-3800
e: mbraff@srcs.k12.ca.us

WESTMINSTER USD || WESTMINSTER, CA

Tony Wold
Assistant Superintendent, Business Services
p: 714-894-7311
e: twold@wsdk8.us

LONG BEACH USD || LONG BEACH, CA

Jacquelyn Roberts
Project Manager
p: 562-997-7550
e: jrroberts@lbschools.net



Scope of services



IV. SCOPE OF SERVICES



SCOPE OF SERVICES

BEAM Professionals understand the scope of work and would like to thank PVPUSD for the opportunity to assist in roofing consultant services, comprehensive roof asset management survey, complete site investigations, testing, construction/bidding documents, construction quality assurance, and maintenance and operation education. Our building envelope services will address the following phases:

Phase I Roof Inspection / "Scope of Work" Evaluation

Phase II Construction Document Preparation / Bidding

Phase III Construction Quality Assurance / Project "Close-Out"

Phase IV Maintenance and Operation Education

Phase I - Roof Inspection / "Scope of Work" Evaluation:

During this phase, BEAM will work in concert with Palos Verdes Peninsula Unified School District, to provide the necessary information required to develop a proper "scope of work" to ensure a cost effective, long-term solution for existing roof areas. During this phase we will identify areas in need of preventative maintenance, repair, replacement or modification. A comprehensive roof report can be issued to summarize our findings at the conclusion of this phase.

The general scope of services to be performed under this Phase:

- Review of historical building and roof system data (building size, building age, roof system/structure type, date of installation and/or repair, work order leaks, etc.).
- Exterior, visual examination of all roof-related membrane and sheet metal flashing, penetrations and projections, and roof mat/deck assemblies.
- Aerial roof plan with the location of all rooftop penetrations and projections identified.

- Exterior, visual examination of the waterproofing integrity of all vertical wall assemblies.
- Core sampling/cross-section analysis of the existing roof mat, insulation and deck assembly.
- IR Thermographic moisture survey of the membrane, insulation and/or deck assembly
- Measure/dimension/sketch roof plan, and locate all penetrations and projections.
- Detailed, site-specific reports prepared for each facility to include a description of the existing conditions observed; current roof system type; anticipated remaining useful life of the current roof system(s); areas in need of preventative maintenance, repair, replacement or rehabilitation identified; recommended work scope (if applicable) along with associated costs, priority ranking/proposed timeframe provided.

**Note: The format and contents of the final report deliverable will be customized to meet the specific program needs and preferences of Palos Verdes Peninsula Unified School District.*



Canyon Creek Elementary School

During this phase, BEAM will work in concert with Palos Verdes Peninsula Unified School District, to provide the necessary information required to develop proper construction and bidding documents then advertise and ascertain bids from qualified contractors to perform the work in the during the 2020 summer break.

The general scope of services to be performed under this Phase:

- Production of construction documents required to ensure the proper detailing and design. System design, code compliance, system guarantee, maintainability along with anticipated service life, will be the criteria used to determine the most cost-effective, long-term "scope of work"
- Establish final detailed "Scope of Work" (Roof System Selection and Design Nomenclature)
- Prepare specification sections (roof deck, roofing system, sheet metal, accessories, etc.).
- Prepare and draw required roof plan and roof related details.
- Manage pre-proposal and proposal conference.
- Inclusion in the evaluation and selection of contractor.

Phase III - Construction Quality Assurance / Project "Close-Out":

This phase is intended to provide part-time quality assurance inspections during the course of construction. Performance under this phase provides extra insurance for specification compliance, quality workmanship, and long-term performance of specified roof system.



Piner High School



Foothill Ranch Middle School

The general scope of services to be performed under this Phase:

- Review and mark-up of submittals and shop drawings
- Manage pre-construction meeting
- Manage pre-installation meeting
- Perform periodic quality assurance inspections during roof related applications
- Roof system installation
- Roof related sheet metal installation
- Assist at job-site meetings
- Assist in progress payment notification
- Assist in final inspection and project close-out

Phase IV - Maintenance and Operation Education:

This phase is intended to provide coordination and assistance during contractors five year warranty, and train district personnel for proper inspection, repair and maintenance functions of roof system.

The general scope of services to be performed under this Phase:

- Track and verifying any warranty adjustments work performed during contractors warranty
- Assist and educate district personnel on maintenance and operation of roof systems.

PROPOSED CALENDAR OF FUNCTIONS

Activity/Task		FEB	MAR	APR	MAY	JUNE	JULY	AUG
1	Execute Owner/Roof Consultant Agreement	February, 2020						
2	Site Verification (Cores, Infrared Scan, Work Orders etc.)	February 17, 2020						
3	Finalize Scope of work for each site	February 21, 2020						
4	50% Construction Documents Review with District	February 28, 2020						
5	95% Construction Documents Review with District		March 6, 2020					
6	Issue for Bid Documents Due		March 13, 2020					
7	First Advertisement for Competitive Sealed Bids		March 16, 2020					
8	Second Advertisement for Competitive Sealed Bids		March 23, 2020					
9	Pre-Proposal Conference at 10:00 AM		March 31, 2020					
10	Proposal Submissions at 2:00 PM			April 14, 2020				
11	BEAM Letter of Recommendation Submitted			April 16, 2020				
12	Award Construction Contract by Board			April 22, 2020				
13	Notice of Award sent to Contractor			April 23, 2020				
14	Construction to Begin					June 13, 2020		
15	Substantial Completion of Project							August 21, 2020



Required Forms (Exh. A)



V. REQUIRED FORMS (EXHIBIT A)



PURCHASE AGREEMENT

Upon notification of selection and Board Approval, the undersigned hereby promises and agrees to furnish all articles or services within the dates specified, in the manner and form and at the prices herein stated in strict accordance with the advertisement, specifications, proposals and general conditions all which are made a part of the purchase agreement.

Name under which business is conducted BEAM Professionals

Business Street Address 600 Anton Boulevard, Suite 1375 Tel: +1 949 548 5000

Costa Mesa

City

CA

State

92626

Zip Code

IF SOLE OWNER, sign here:

I sign as sole owner of the business named above.

IF PARTNERSHIP, sign here:

The undersigned certify that we are partners in the business named above and that we sign this purchase agreement with full authority so to do. (One (1) or more partners sign)

IF CORPORATION, execute here:

The undersigned certify that they sign this purchase agreement with full and proper authorization so to do.

Corporate Name

PBK Architects

Signed

Title

Vice President

Signed

Title

Incorporated under the laws of the State of Texas

CERTIFICATION OF DISCLOSURES

Submission of the complete and accurate Certification of Disclosures is a requirement for consideration.

1. Provide a disclosure of any and all relationships with current District employees and/or Board members that could be determined to be a conflict of interest for this RFP.

BEAM Professionals does not have relationships with current District employees or Board members that could be conflict of interest in this RFP.

2. Disclosure of any finder's fees, fee splitting, payments to consultants, or other contractual arrangements of the firm's that could present a real or perceived conflict of interest.

BEAM Professionals does not have any finder's fees, fee splitting, payment to consultants, or other contractual arrangements.

3. Disclosure of all litigation involving your firm in the last five (5) years.

N/A

4. Within the last five years, has your company been terminated by a client during the course of any project? If so, please explain.

BEAM Professionals has not been terminated by a client during the course of any projects.

Information Above Completed By (Signature):

Name:

Position:

Date: February 5, 2020

Above Information Reviewed and Certified to be True By (Signature):

(Must be an Owner, Managing Partner, or Chief Executive of the Firm)

Name: Shawn LeCrone

Position: Vice President

Date: February 5, 2020

CONTRACTOR REPRESENTATION AND CERTIFICATION

The undersigned hereby acknowledges and affirms that:

- He/she is a duly authorized agent of the Contractor with the authority to submit a Proposal on behalf of the Contractor (corporate or other authorization confirmation may be requested prior to final contract execution).
- He/she has read the complete RFP documents and all amendments issued pursuant thereto.
- The Proposal complies with State conflict of interest laws. The Contractor certifies that no employee of its firm has discussed, or compared the Proposal with any other Contractor or District employee, and has not colluded with any other Contractor or District employee.
- If the Contractor's Proposal is accepted by the District, the Contractor will enter into a contract with the District to provide the Services, Systems and Equipment described by the Proposal on the terms mutually acceptable to the District and the Contractor.
- The District reserves the right to reject any or all proposals.

I hereby certify that I am submitting the attached Proposal on behalf of *[Specific Entity Submitting Proposal]*.

I understand that, by virtue of executing and returning this required response form with the Proposal, I further certify, that the Contractor understands and does not dispute any of the contents of the proposal requirements (except as may be noted in the response).

Contractor Name: BEAM Professionals

Address: 600 Anton Boulevard, Suite 1375, Costa Mesa, CA 92626

Telephone: +1 949 548 5000

FAX: N/A

E-Mail: Shawn.Lecrone@beamprof.com

By: Shawn LeCrone, Vice President

Date: February 5, 2020



Manual signature of Authorized Agent

Printed Name and Title of Authorized Agent:

Shawn LeCrone, Vice President

NOTE: If Joint Venture, each member of the joint venture must provide a completed certificate form.

NONCOLLUSION DECLARATION

TO BE EXECUTED BY CONTRACTOR AND SUBMITTED WITH PROPOSAL
(Public Contract Code section 7106) The undersigned declares:

I am the Vice President of BEAM Professionals, the party making the foregoing proposal.

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

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

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on February 5, 2020 [date], at Costa Mesa [city], CA [state].



Signature

Shawn LeCrone, Vice President

Print Name

V. REQUIRED FORMS (EXHIBIT A)

CERTIFICATION OF PRIMARY PARTICIPANT REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS

The Vice President (title) of BEAM Professionals (Contractor/Firm Name)

Certifies to the best of its knowledge and belief that it and its principals:

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal department or agency;
2. Have not within a three-year period preceding this proposal been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state or local) transaction or contract under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state, or local), with commission of any of the offenses enumerated in paragraph (2) of this certification; and
4. Have not within a three-year period preceding this proposal had one (1) or more public transactions (federal, state or local) terminated for cause or default.

If unable to certify to any of the statements in this certification, the participant shall attach an expiration to this certification.

I HEREBY CERTIFY OR AFFIRM THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISIONS OF 31 U.S.C. SECTIONS 3801 ET SEQ. ARE APPLICABLE THERETO.

Shawn LeCrone, Vice President

THE PRIMARY PARTICIPANT



Signature and Title of Authorized Official

BEAM Professionals

Firm Name/Principal

February 5, 2020

Date

CERTIFICATION OF RESTRICTIONS ON LOBBYING

I, Shawn LeCrone, hereby certify on behalf (name of offeror) of
BEAM Professionals that: (Firm
name)

1. No Federal appropriated funds have been paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds, other than Federal appropriated funds, have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit the attached, Standard Form-LLL, "Disclosure of Lobbying Activities", in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in all subcontracts, and that all subcontractors shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance is placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

Executed this February day of 5, 20 20

By 

(Signature of authorized official)

Vice President

(Title of authorized official)

Acknowledgment of Addenda

VI. ACKNOWLEDGMENT OF ADDENDA



ACKNOWLEDGEMENT OF AMENDMENTS TO RFP

CONTRACTOR HEREBY ACKNOWLEDGES RECEIPT OF ANY AND ALL AMENDMENTS TO THE RFP.

If Contractor has no knowledge of any amendments to the RFP having been issued to, or received by, Contractor, please check following box: ☐

Amendments

Amendment No.	Date Published	Date Received
RFP NO. PS024--010820	January 30, 2020	January 30, 2020
RFP NO. PS024--010820	January 31, 2020	January 31, 2020

By: 

Signature of Authorized Agent

Date: February 5, 2020

Name and Title of Authorized Agent: Shawn LeCrone, Vice President

Name of Contractor: BEAM Professionals



ADDENDUM #1
RFP NO. PS024-010820

January 30, 2020

TO ALL:

RFP No. PS024-010820 is hereby changed as stated with these amendments. The following changes, omissions, and/or additions to the RFP shall apply to proposals made for and to the execution of the various components of the service affected thereby.

All parties of interest shall take careful note of the addendum so that the proper allowances may be made in strict accordance with the addendum. In cases of conflicting proposal information in the RFP, the addendum shall govern.

Clarifications/Questions:

Question 1: The repair and re-roof of \$1M is total for an average of 7-12 sites combined, not \$1M per site, correct?

Answer: Correct. We only have \$1M or less budgeted per year to address our most serious roofing needs. The total cost for sites has varied each fiscal year, but never exceeded \$1M, including consulting fees. PVPUSD will work with the consultant to identify what sites will require work for 2020 with the consultant helping to identify budgetary numbers to stay within budget.

Question 2: Will the two 1-year extensions be based on the \$1M construction budget also?

Answer: As mentioned, we only have \$1M budgeted per year. We cannot exceed this amount annually.

Question 3: I see that your district is looking for roofing consulting services for summer 2020 projects. Would you be interested in a bid for inspector of record services for both DSA and non DSA projects?

Answer: Yes. If you solely want to bid this portion of the RFP, the District is agreeable to multiple awards for services. Please state your hourly fee. Services will be performed on an as-needed basis once we determine the scope of the repairs for 2020.

Question 4: How many buildings are included in our scope? If for all 18 schools listed in the RFP, can we assume 1 roof per school? Can you please provide a list of the roofs included in the scope and the square footages and the building addresses?

Answer: The number of buildings and scope will be determined by PVPUSD and the roofing consultant, upon completion of your investigations/testing. Be advised, we have a total of 20 sites.

Question 5: Are there any existing as-built drawings, roof plans, photos, maintenance or repair reports, etc. to give us an understanding of the roofs in questions and their existing condition?

Answer: We have schematics of all buildings, of which were presented to the Board of Education in 2015

to develop a 10-year budget. Since then, we have completed 3 years of improvements and/or replaced roofing on buildings.

Question 6: Does the district have an idea of which roofs need to be repair and which need to be replaced? Our estimate of fees will greatly depend on if such documents are available, and/or if there is a known-issues list of some type.

Answer: PVPUSD staff knows with sites/buildings need repair/replacement. We have on-going issues that are known and unforeseen. We will plan for those known to be the most critical. The roof consultant will identify the recommended scope of the project and what can be achieved within budget.

Question 7: The RFP states the scope of work is to provide a comprehensive roof asset management survey, "including but not limited to site investigations, testing, survey, construction, and bidding docs." Is the RFP scope of work for us to assess existing buildings and prepare scopes of work for 2020 roofing repair/replacement projects only?

Answer: Yes. This is identified as two phases, "Site Investigations and Bid Documents".

Question 8: Does the scope also include us doing the engineering design and construction administration /monitoring work for those repairs/replacements as well?

Answer: Yes.

Question 9: With the information given, it is impossible to determine an accurate scope of the roof repairs or appropriate re-roofing recommendations (let alone provide a realistic calendar or cost of work as requested). We have no way of identifying latent conditions or unique design requirements. Ideally, we would perform the investigation and develop the scope of repair first to be able to provide accurate design, bidding, and construction phase pricing.

Answer: This is a maintenance project that addresses our most immediate roofing needs. It is assumed that the scope of repairs will not exceed \$900k. Our needs are prioritized, thus not requiring immediate assessment at all sites/buildings throughout the district. We need the assistance of a consultant to identify the aforementioned to prepare for a Roofing Bid. Schematics for all sites have been posted to help you familiarize yourself with our campuses.

Question 10: The RFP states that bidding/construction documents are due by March 13, but the scope repairs has not yet been determined. This would give us under 6 weeks to perform all site investigations/testing, prepare and finalize repair/re-roofing scopes, and produce the engineering files (for potentially up to 18 buildings). Can you please confirm?

Answer: Correct. Depending on repairs/maintenance, the cost per building at the sites varies. One building at a high school could represent 30% of our budget in the past. Thus, please do not assume work at every district location. Again, we only have a budget of \$1M per year for all associated roofing costs.

Question 11: The RFP states that we should assume 7-12 site visits. Can you please confirm what these site visits are for? If there are for the investigation phase only, we would need to do at least one visit per roof to assess existing conditions.

Answer: For the purpose of investigations, you will be required to complete at least one visit per site. The number of buildings will vary per site and typically is not more than 10 depending on the cost of repairs/maintenance. The remaining visits are for quality assurance, monitoring and administration costs to oversee the project to be performed by the successful roof contractor.

Question 12: Will the school district separately retain and/or provide a DT Contractor and lifts to assist the investigation phase, or are we to assume that we will retain all necessary subcontractors?

Answer: The district is not retaining a separate contractor. The only services that we may retain are inspectors, on an as needed basis.

Question 13: How did the District determine the NTE repair costs of \$1M? Is there some idea of the repair/re-roofing scopes or is that simply the budget available? Does this \$1M also include our consulting budget as well as contractor costs?

Answer: The NTE repair costs of \$1M was defined by our Board of Education after consultation with our former Director of Facilities and industry consultants. The 2015 drawings are representative of what was presented to the Board of Education. The \$1M budget includes all associated roofing costs, including but not limited to consulting fees.

END OF ADDENDUM #1

Please confirm receipt of this addendum by date and signature and include with your proposal.

BEAM Professionals

Company Name



Signature

February 5, 2020

Date



ADDENDUM #2
RFP NO. PS024-010820

January 31, 2020

TO ALL:

RFP No. PS024-010820 is hereby changed as stated with these amendments. The following changes, omissions, and/or additions to the RFP shall apply to proposals made for and to the execution of the various components of the service affected thereby.

All parties of interest shall take careful note of the addendum so that the proper allowances may be made in strict accordance with the addendum. In cases of conflicting proposal information in the RFP, the addendum shall govern.

Proposal Due Date is amended to be Wednesday, February 5th, 2020, no later than 11:00am.

- Phase 1 will require the consultant to perform site investigations, destructive testing and surveys for maintenance and repair of buildings identified by PVPUSD, based on on-going issues identified and prioritized since Summer 2019. As priority sites are visited, the consultant will provide an estimate for the work to be performed. As sites are visit, we will keep track of the cumulative total and suspend visits to additional sites once our pre-determined budget is met.
- Phase 2 will include preparation of RFP documents, including but not limited to a written scope of work, photos, testing and survey results and support the process through award of the Roofing Contractor RFP. PVPUSD will provide the template RFP and assume the cost of printing all bidding materials with our in-house printer.
- Phase 3 is quality assurance monitoring, observation, management, monitoring and administration through completion of the project.
- Other, can be interpreted as many things. Please describe the services that you can provide for the purpose of district roofing. This may include inspection services, etc.

For any part of the proposal, please delineate any exceptions, restrictions or contingencies in your proposal.

END OF ADDENDUM #2

Please confirm receipt of this addendum by date and signature and include with your proposal.

BEAM Professionals

Company Name

Signature

February 5, 2020

Date



RFP Price Form

VII. RFP PRICE FORM



RFP Price Form

Submitted herewith is our proposal to act as the district consultant to provide a comprehensive roof asset management survey including, but not be limited to site investigations, testing, survey, construction and bidding documents, construction monitoring and observation and on-site inspection, repair and maintenance training for district staff.

The contract will be awarded for one (1) year with an option for two 1-year extensions.

FEES

The fees should be stated as a not to exceed for each phase. Assume 7-12 sites with work to be performed and the budget for the actual repair and re-roofing will NOT exceed \$900,000.

FINANCIAL CONSIDERATION

Please identify hourly rates on which services proposed are based and any "other" fees for optional services available to PVPUSD.

COMPENSATION

The professional fees for the roofing consultant services structure: Fee is a not to exceed pricing based on approximately \$900,000 roofing construction cost.

PHASE I	Roof Inspection / "Scope of Work" Evaluation	\$15,000
PHASE II	Construction Document Preparation / Bidding	\$33,750
PHASE III	Construction Quality Assurance / Project "Close-Out"	\$18,750
PHASE IV	Maintenance and Operation Education	\$7,500
Other	Infrared Thermographic moisture survey of roof assembly	Included
Other	Core sampling/cross-section analysis of the existing roof mat, insulation and deck assembly	Included
Total Not to Exceed Fee		\$75,000

WORKING ASSUMPTIONS & CLARIFICATIONS

1. BEAM does not assume responsibility or liability for asbestos consulting and/or abatement services, which are the sole responsibility of the Client/Owner. BEAM will assist PVPUSD with required coordination efforts with regard to re-roofing when impacted by asbestos consulting and/or abatement service needs.
2. Upon request, BEAM will provide recommendations for a local, third-party Testing Lab Consultant to perform IAQ and Mold Testing, Asbestos Surveys, Ground Penetrating Radar, Environmental Studies, and Abatement services, as required.

REIMBURSABLES

1. The fees quoted above do not include the costs for the production of the final assessment report or for presentation-related materials (if applicable), such as printing, binding, shipping and/or delivery fees.
2. Eligible reimbursable expenses for report printing and/or presentation-related expenses referenced above will be billed on a monthly basis for actual expenses incurred during the prior month and will include associated/back-up receipts.
3. There will be no mark-up on reimbursable expenses.

PROFESSIONAL FEES FOR ADDITIONAL SERVICES

There will be no fees for additional services incurred or billed without prior written authorization from Palos Verdes Peninsula Unified School District.

Throughout the year, the District requires additional services such as having the consultant accessible to the District by providing telephone and written services for such purposes as answering inquiries, answering state agencies about labor compliance and similar problems. These services shall be provided at no additional fee during the tenure of the contract.

In the event that circumstances disclosed by the consultant indicate that more detailed information is required in addition to that which would be sufficient under ordinary circumstances, the consultant agrees to notify the District in writing of all facts relative to extraordinary circumstances, together with a written estimate of the additional cost of work and services thereof within 5 business days. No claims of the consultant for extra work or services shall be allowed or paid without such written consent and approval of the District first having been so obtained before such extra work and services reentered upon or undertaken.

Submitted this February day of 5, 2020

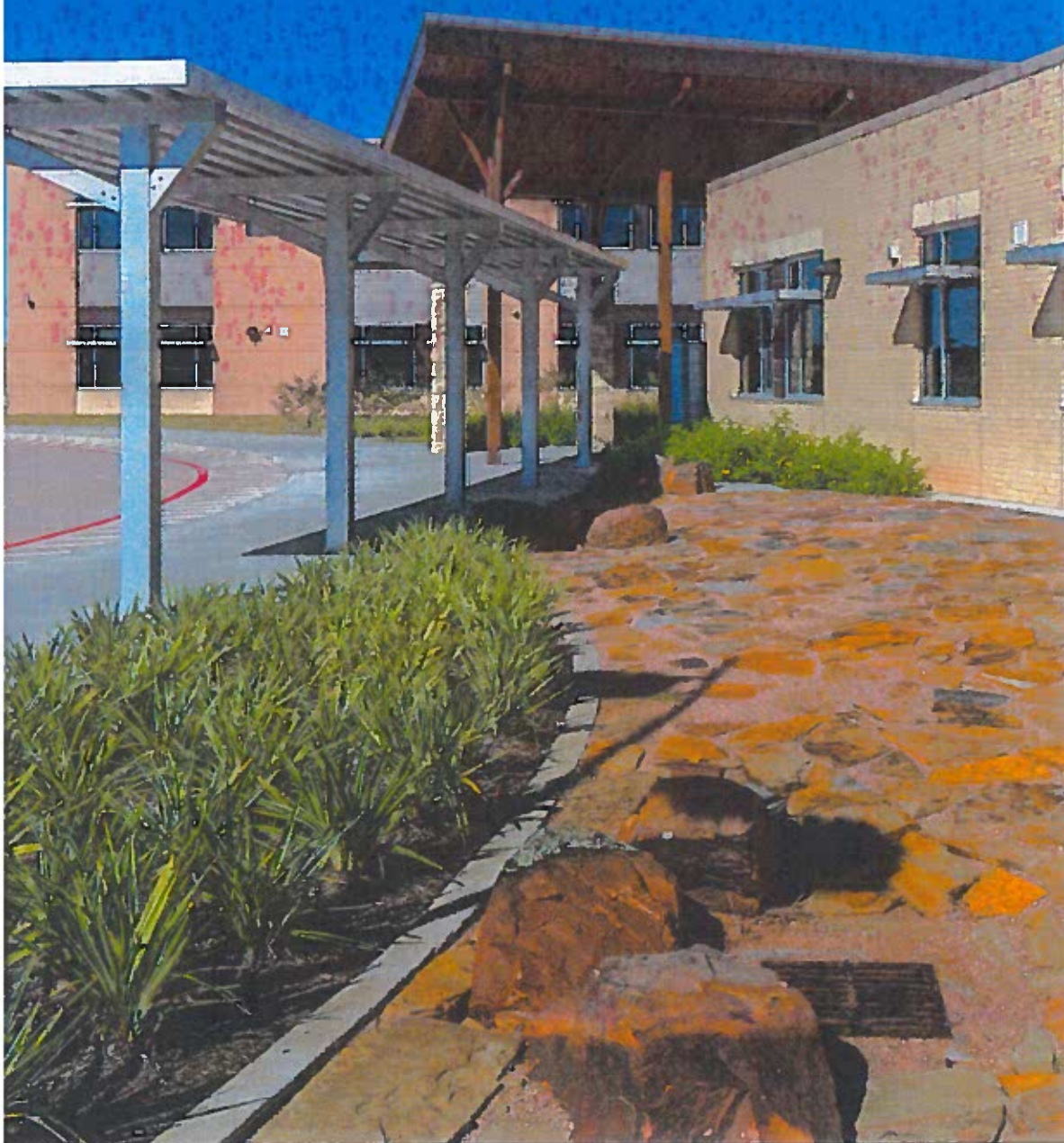
Name of Firm: BEAM Professionals

By: 

Authorized Signature

Title: Vice President

Typed or Printed Name: Shawn LeCrone



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