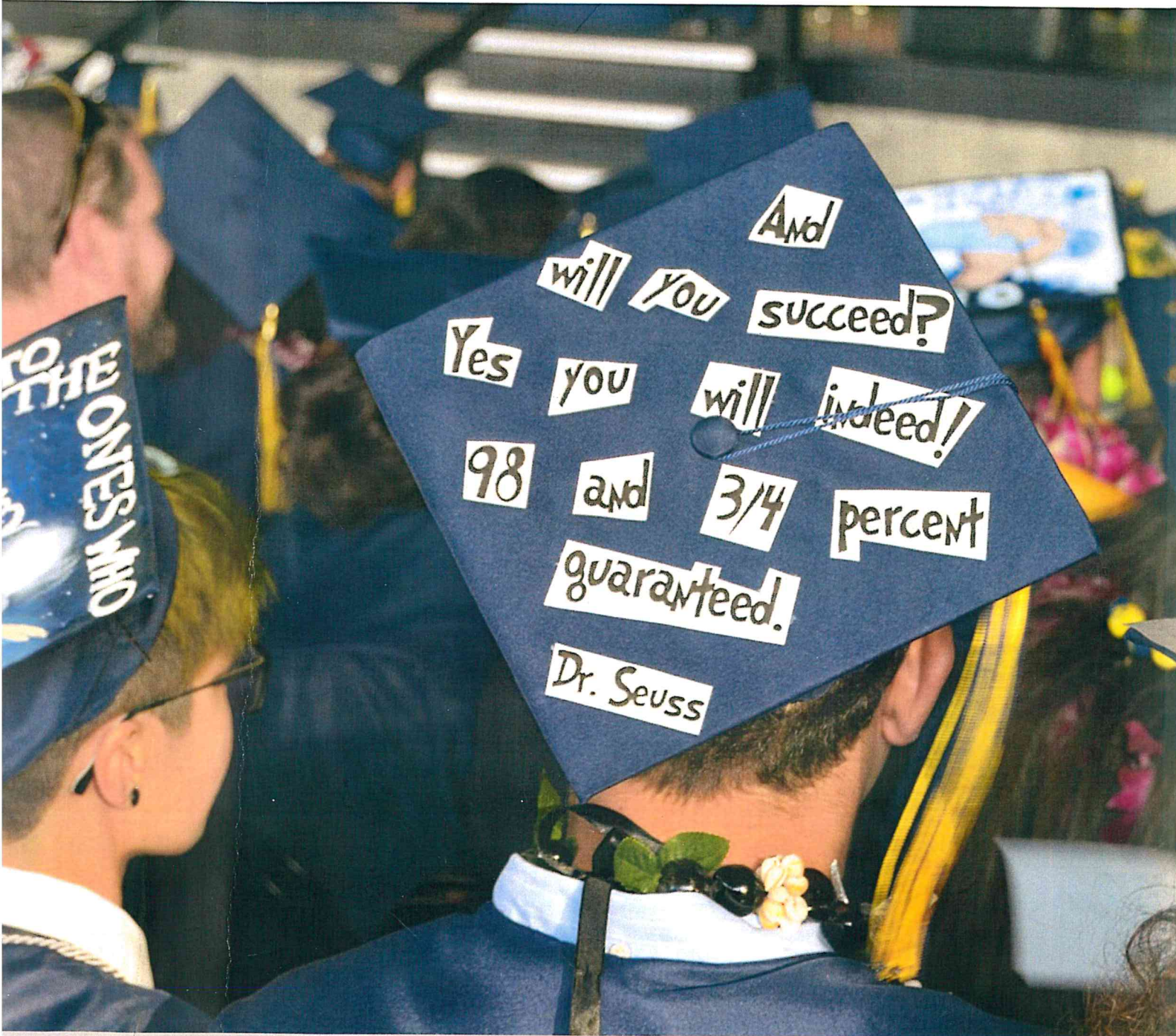


# STATEMENT OF QUALIFICATIONS FOR

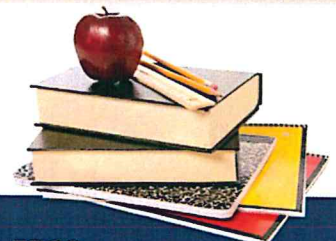
## PROGRAM AND CONSTRUCTION MANAGEMENT SERVICES

PRESENTED TO:

**Mount Diablo Unified School District**



Program Managers  
Construction Managers  
General Contractors



3230 Monument Way | Concord, CA 94518 | 925 671-7717 | FAX 925-671-7788

<http://www.rgmassociates.com>





Laurel Elementary School • Menlo Park City School District

March 19, 2019

Ms. Rose Ramos, Chief Business Officer  
Mt. Diablo Unified School District  
2326 Bisso Lane  
Concord, CA 94520



**RE: Program and Construction Management Services**

Dear Ms. Ramos,

It is with pleasure that RGM and Associates submits the attached Program and Construction Management Services to the Mt. Diablo Unified School District. For the past 25 years our primary focus has been assisting public school districts with planning and construction management services. As a result of our experience, RGM is recognized for its market leadership, responsible business practices, and ability to develop a genuine rapport with our clients while acting in their best interests.

**WHO WE ARE...** RGM and Associates is a Construction Program and Management firm with a solid background established first in 1987 as a General Contractor building public and private facilities. In 1993 we turned our focus to K-12 construction planning and management consulting. Our previous general construction "in the trenches" know-how, combined with the expertise gained in the practical application of planning and construction management sets us apart from other management firms. RGM has consistently demonstrated an ability to respond to the unique facility challenges of wide-ranging district's needs and consistently meet those challenges with creative, efficient, and cost-effective solutions.

**WHERE WE WORK...** RGM's main office is in Concord. We provide a wide menu of program, planning and management services to clients throughout Northern California and are currently managing comprehensive bond programs for Brentwood Union, Jefferson (Daly City), Lafayette, Moraga, Martinez, Monterey, Oak Grove Union and Pope Valley, Redwood City, San Leandro, Tracy School Districts and the San Mateo County Office of Ed., as well as providing planning and consulting for Menlo Park City schools, Mt. Diablo Unified School District, River Delta Unified School District and the Sequoia Union High School District.

**HOW WE CAN HELP...** RGM offers a "hands-on" methodical approach to the planning and construction of school facilities, originating from our experience building schools, refined by our understanding of the unique challenges each district must tackle throughout the planning and construction phases, and sustained by our continuing commitment to finding solutions to each of the challenges we will face together.

RGM received a copy of the District's form of Agreement for Construction Management Services ("Agreement") attached as APPENDIX A to the RFQ/P. RGM has reviewed the Agreement, including the indemnity provisions and insurance provisions contained therein. If given the opportunity to contract with the District, RGM has no objections to the use of the Agreement.

RGM clientele can attest to our professionalism and ability to assemble a team that will best suit the needs of the Mt. Diablo Unified School District, as well as the prudent and sensible attributes we can contribute to the success of the District's Program. We encourage you to contact our clients and learn how we have helped them with similar programs and literally "paid for ourselves" along the way.

Respectfully Submitted,

A handwritten signature in blue ink, appearing to read 'Ralph J. Caputo', is written over a horizontal line.

Ralph J. Caputo  
President

**RGM and ASSOCIATES**  
3230 Monument Way  
Concord, CA 94518  
(925) 671-7717  
Fax: (925) 671-7788  
CSL 509513

Email: [Ralph@rgmassociates.com](mailto:Ralph@rgmassociates.com)



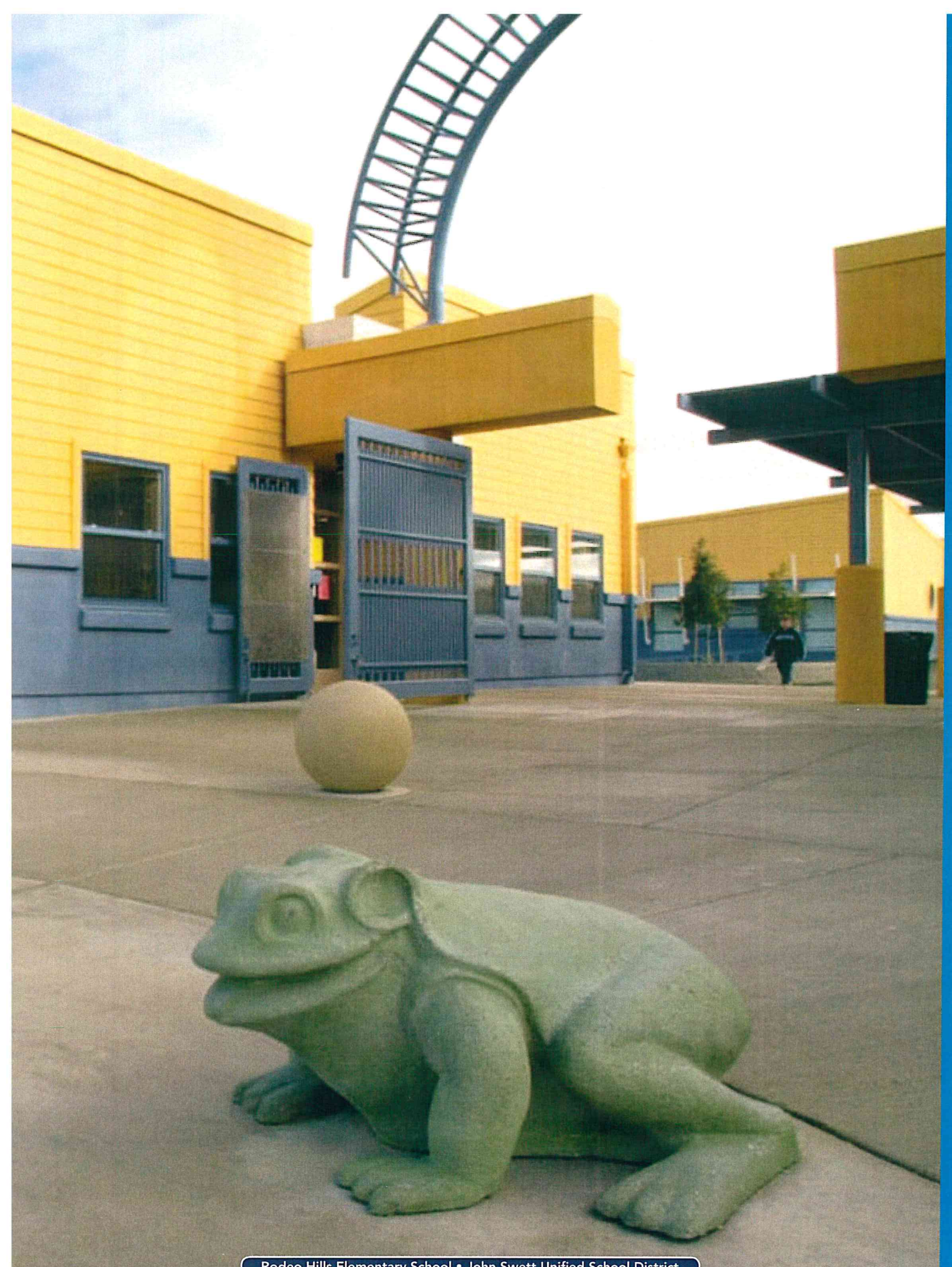
Alhambra High School • Martinez Unified School District



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Antioch High School, Antioch Unified School District



Rodeo Hills Elementary School • John Swett Unified School District

## PROGRAM MANAGEMENT APPROACH

RGM and Associates provides a full menu of services. Our experience and expertise includes effectively working and communicating with a variety of stakeholders such as District and site administration and staff, State and Local regulatory agencies, consultants, contractors and vendors, community groups, Citizen Bond Oversight Committees and Governing Boards. RGM understands the types of concerns that are typically posed by staff and community groups and can guide the District in effectively addressing them. RGM is skilled in helping districts identify the key decision points and in helping the entire school community throughout the planning and construction processes.

RGM works closely with State and local agencies to properly plan and execute school construction programs. We often act as the clearing house to manage the selection, coordination and submission of all applicable documentation to the respective governing agencies.

RGM's team members are fluent in Division of the State Architect (DSA), California Department of Education (CDE) and Office of Public School Construction (OPSC) programs and requirements, including CTE and Joint Use Facilities, CEQA and DTSC protocol. Having experience managing many commensurate programs and maintaining a close relationship with these agencies enables our clients to follow design and regulatory approval standards and timelines.

Our approach to Construction Management can be summarized as a highly collaborative process. We recognize that every client has different needs and requirements, may use in-house or other consultant expertise, or may require particular guidance from RGM in place of a dedicated building program representative. Our staff is fluid and works with all associated parties to define a process that will achieve the best value and help expedite the design and construction program.





### **Communication and Coordination**

Since our fundamental role is to facilitate the design and construction process, detailed planning, effective communication and coordination are essential. The final program will clearly document the District's educational program, design criteria, and bond program goals and requirements. To promote a successful program, close communication and coordination with a variety of diverse stakeholders, regulatory agencies, planning and advisory committees, and community and decision makers is essential. We will facilitate design review meetings and establish budget workshops during the design phase and involve the appropriate District and user groups in the process. Our standard protocol is to conduct weekly project meetings during construction and provide routine status reports and other construction or funding related items to the District, Governing Board, Bond Oversight Committee and the Community.

Effective communication also requires an emphasis on frequent communication with all team members and user groups and to provide access to relevant project information. This enables the design and management team to recognize potential issues early, develop and implement solutions and keep the projects moving forward efficiently during design and construction. Our role is to facilitate the process and complement the architect's efforts, while serving the District's best interests.

### **Understanding Program and Quality Expectations**

A crucial task in planning is a discussion with the Design Team and the District regarding the standard of quality, specific design components, program and educational features and other criteria, such as environmental (green) construction goals and items important to staff. This information will be used to define the program and establish quality and product guidelines for the project(s).

### **Anticipating and Planning for Problems**

No project plan or design can be perfect. Our project managers are trained to anticipate problems and with each anticipated problem offer potential solutions. By identifying potential problem areas early, we facilitate informed decisions and help ensure successful projects.

### **Cost Control**

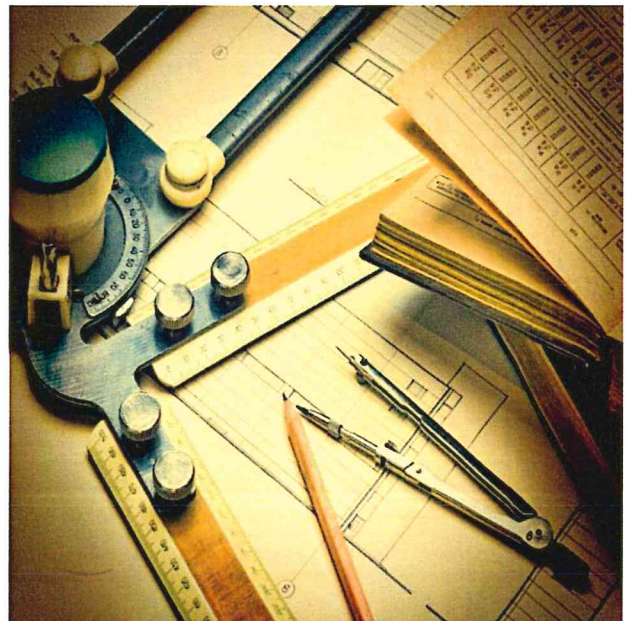
Through the planning process we may identify potential cost savings. These and additional recommendations such as utilizing phasing, sequencing, and other contract implementation methodology intended to minimize disruption at the site, help to develop a logical contract package and optimize the District's construction budget and schedule.

### **Funding Analysis and Support**

RGM has provided funding support services to its clients since the inception of the School Facility Program (SFP). We are able to work in conjunction with the OPSC, a district's funding consultant, or directly with Business Services. In many districts where we provide full service program and construction management, we complete funding application documents, track applications through the OPSC process, and provide annual and final expenditure reports.

### **Cash Flow Projections and Resource Management**

It is crucial to any program or project to maintain efficient cash flow. We provide Cash Flow Projections tied to the Master Schedule to help ensure that the District can, first, construct within the bond authority and, second, anticipate phased revenue sources. Good general contractors and subcontractors are known to bid to agencies that pay promptly. Our forms and procedures for managing payment requests are designed to provide the information that the District Business Office needs to process payment applications in a timely manner, along with all the assurances that the pay requests are reasonable, legal, and undisputed. Our expertise and communication skills allow the District to efficiently perform its obligations as the owner of a construction project and conform to the requirements of its Bond Program.



### **Pre-Design and Design Development Phases**

Utilizing the experience and talents of RGM during the planning and design phases will prove an important component in the timely and cost-effective development and completion of the overall program. The proposed

team will help the District and Design Team assess its program goals (coordinated with staff and user groups) then review proposed building materials, check design trends with the budget, and help develop realistic budgets.

Without this oversight and coordinated process, many Districts may go to bid only to find they cannot afford the design they worked so hard to develop. This not only renders their efforts moot and may leave them at odds with their design team, but it can compound budget constraints and schedules. RGM's successful track record bringing projects in on time and within budget is evidence of its expertise in planning and design.



#### **DSA and CDE Coordination**

RGM will help the District and Design Team secure approval of plans and specifications from DSA, OPSC, CDE and, when necessary, local agencies. We are adept at assisting districts with DSA project certification, for current projects during which we support the architect in the closeout phase and also for districts when completed and occupied projects have been closed without certification. We have successfully accomplished certification of legacy projects that have been archived for years due to incomplete documentation or other obstacles, such as inspectors or architects who can no longer be located.

#### **When the District puts a project out for bid, in effect, they warrant that:**

- The project can be built per the plans and specifications.
- All the components will fit together as depicted.
- It is physically possible to accomplish construction of the project through reasonable means, (unless otherwise specified).
- The project construction can be accomplished within the prescribed time.

#### **Constructability Reviews**

RGM performs comprehensive plan and specification reviews to ensure that the plans are *biddable* and *buildable*. Detailed constructability reviews literally pay for themselves by mitigating potential change orders and associated delays and cost overruns. Successful cost and quality control starts in the planning phase with a thorough review of the plans and specifications for constructability and compliance with District standards.

RGM and Associates performs its constructability reviews from a contractor's perspective to determine if the documents are sufficient to compile a bid and adequate for the contractor to determine how to construct the project; specifically, *is it "biddable and buildable"?* The plan reviewer also checks that the materials specified are readily available and the methods are proper for the purposes and in compliance with District standards. A thorough review process includes some or all of the following:

#### **Coordination Review**

A Coordination Review, sometimes referred to as an Interdisciplinary Review, is typically intended to cross reference the Architectural drawings with the technical specifications and the various engineering disciplines (i.e., structural, mechanical, plumbing and electrical drawings). The purpose is to alleviate internal inconsistencies in the documents by ensuring proper coordination between the various disciplines, thereby mitigating conflicts between the trades and potential change orders.

#### **Code Compliance Review**

A Code Compliance Review consists of an examination of the documents in relation to Title 24, DSA criteria and other applicable Building Codes. This will include review for fire-life-safety, ADA access, structural, plumbing, mechanical and electrical code compliance. Our review staff includes DSA-certified, working inspectors who know the local DSA field representatives' particular criteria and special issue items.

#### **Value Engineering**

Value Engineering is a review intended to offer alternative materials and methods which will essentially serve the same aesthetic and structural purpose but may be more readily available and less expensive than that which is specified. A proper review will also consider life cycle cost factors and maintenance and operation expenses on machinery and appliances. An extension of the review often entails a comprehensive search for cost saving factors which may compromise the original design somewhat, but is intended to help bring projects back into budget.

### **A Project Manual and Specification Review is two-fold:**

- Review the technical specifications for compliance with District Standards, completeness and compatibility with the drawings. This aspect is described as a part of the Coordination Review above.
- Review of the front-end documents (the contract, instructions to bidders, bond forms, general, supplemental and special conditions, payment procedures, coordination requirements, insurance requirements and other Division 1 requirements) for compliance with current regulations and complete coverage of contractual issues.

### **Contract Documents**

In conjunction with the architect and legal counsel, RGM thoroughly reviews the front-end (contract) documents, often adding supplemental conditions and project specific criteria to help avoid disputes, claims and potential change orders.

### **Bidding/Negotiation**

RGM can facilitate the entire bid process. We will prepare the advertisement for bid and solicit contractors and subcontractors, track bid documents and addendum distribution, and conduct pre-bid walkthroughs and bid openings. Our thorough oversight of the bid process reduces the chance of bid protests and delays or claims. Upon receipt of bids, we can prepare a report and recommendation for the District to approve award, issue the Notice of Award, and execute contracts and bonds, check insurance and bonds with District Counsel and issue the Notice to Proceed.



### **Meeting Management**

Project meetings are a key communication forum. RGM believes in collaborating with all parties to ensure we are “on the same page”. We do not believe in having a meeting without a clear purpose, agenda, schedule, and resulting action items.

RGM conducts pre-construction meetings that introduce the contractor to the design and inspection professionals. Before the project starts, we require the contractor produce a Schedule of Values and a proposed project schedule that demonstrate a thorough knowledge of the project and the materials and methods that will be used to meet the District’s expectations and contract requirements. A discussion of the testing and inspection requirements, including those of the DSA, local fire authority, and various utilities is held at the pre-construction meeting.

The Project Manager or RGM team will participate in weekly and monthly construction meetings as well other meetings related to the project. We maintain meeting notes to record, (and track), decisions, direction and action items. Progress meetings and the minutes of those meetings are invaluable in ensuring that the contractor complies with the plans and that testing and inspection requirements are being met. Progress meetings are usually followed by a job walk, so that the design team, the inspector, and the project manager observe the progress of the project.

We routinely attend Board meetings and present project status reports, budget updates, bid award and change order recommendations, and other Board agenda items. We can be “front and center” or work in the background providing support to the facilities or business staff for any public administrative reporting or accounting presentations.

### **Submittals**

RGM prepares a list of anticipated submittals and confirms with the contractors when the documents will be submitted. The submittal logs will track documents from initial receipt to final approval. Submittal status is a topic of each weekly meeting so that the review process does not impact the schedule.

### **Request for Information Management**

RGM receives and monitors Requests for Information, (RFIs), keeping a detailed RFI tracking log which is then used as an agenda item at each weekly meeting. Any RFI that has the possibility of a cost increase is entered in the potential change log and tracked.

### Change Order Philosophy

The best way to bring a project in on-time and under budget is to plan properly and control changes. While every project will experience some degree of change orders, effective project management means mitigating change orders and their impact on the project schedule and budget.

Change Orders often carry a negative stigma with them because they essentially indicate deviations from the plans and intended scope. Moreover, they depict unanticipated impact to the project budget. However, Change Orders are an integral part of the construction process and virtually every project will experience some degree of change orders. Because of the contractual relationship, changes in the work will either be requested from the District or the Contractor. They can, however, stem from a myriad of parties and reasons.

Change Order requests brought by the Contractor will usually relate to problems encountered with existing conditions, conflicts or discrepancies in the plans and specifications, Contractor deviations, or field modifications by DSA or the architect. Other Change Order requests are owner-initiated, value-added items. It should also be noted, that not all change orders are additive, some can be deductive. Nevertheless, a preponderance of changes can lead to a claim for additional compensation beyond the actual cost of performing the additional work. Therefore, a balance must always be considered in any project and this is why RGM focuses on master planning and thorough plan reviews, which will prove invaluable prior to the bid.



### Information Management

RGM establishes document filing and retrieval systems in conformance with District standards. Using Meridian Systems Prolog suite or custom software, our information system will provide the project team rapid access to key project documents.

### Materials Testing Coordination

RGM assists the Project Inspection Team in coordinating, monitoring, and logging all field and laboratory testing required by contract or code. If the testing reveals a non-conformance, the project management team will notify the contractor and track the agreed remedial actions until the non-conforming work is replaced, repaired and accepted.

### Project Close Out

From the beginning and throughout the project, RGM will work diligently toward prompt project close out. As the project nears completion, we will develop a log of required training, operations and maintenance manuals, spare parts, warranties and other closeout requirements. We will work with the District and the Design Team to resolve final punch list items and coordinate completion with final payment and close out documentation. We will initiate the closeout process to ensure a smooth transition to occupancy of the facility. We continue after construction is completed to assist the District and Design Team to timely close out projects with the DSA and OPSC.

### Warranty

During the warranty period, RGM notifies the contractor of warranty items to be corrected and follows through to ensure each item is corrected properly and in a timely manner.

*"Our program management services emphasize the facilitation of our clients' decision-making processes and the determined execution of their vision. Whether selecting and managing architects and builders, or maintaining control over quality, cost, and schedule, our role is to ensure that our client's performance criteria are met in every aspect. Our philosophy advocates transparency, honesty, integrity, responsiveness and helpfulness. These characteristics of RGM allow our team to respond in fluid and dynamic ways to the unique challenges of the District."*



Dallas Ranch Elementary School • Antioch Unified School District

## Locations and Contacts

### **RGM and Associates Corporate Office**

3230 Monument Way  
Concord, CA 94518  
Phone: (925) 671-7717  
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[www.rgmassociates.com](http://www.rgmassociates.com)

Ralph J. Caputo  
President, CEO/Owner  
[ralph@rgmassociates.com](mailto:ralph@rgmassociates.com)

### **Kramer Project Development Company**

**San Jose Regional Office**  
4020 Moorpark Avenue, # 220  
San Jose, CA 95117  
Phone: (408) 246-6327

Rick Kramer  
President, CEO/Owner  
[rick@kramerpc.com](mailto:rick@kramerpc.com)

### **RGM and Associates Santa Rosa Regional Office**

1101 College Avenue, # 215  
Santa Rosa, CA 95404  
Phone: (707) 575-9550  
Fax: (707) 575-9377

Greg Lykken  
Project Manager/Estimator  
[gregl@rgmassociates.com](mailto:gregl@rgmassociates.com)

Andrea Noble  
Sr Program Manager/Funding  
Specialist  
[andrea@rgmassociates.com](mailto:andrea@rgmassociates.com)



Rancho Medanos Junior High School, Pittsburg Unified School District

**RGM and Associates** was incorporated in the State of California in February 1987 and has been in operation constantly for over 31 years. Since 1993 RGM has focused primarily on representing public agencies with Program and Construction Management Services and the facility needs of K-12 districts. The principals of the firm are Ralph J. Caputo, President; Jon Novero, Vice President of Operations/Secretary; and Gino Elliott, Vice President. RGM and Associates maintains an active "B" Contractor's License, #509513.

**RGM and Associates** is a program and construction management firm specializing in public sector work with greater than 95% concentration in K-12 educational facilities. We provide comprehensive planning, funding support, facility assessments, educational specification consulting, facility master planning, pre-construction services, construction phasing and management, expenditure reporting, grant writing, and other specialized services. Our personnel and primary team members are Senior Project Managers and Project Managers with demonstrated experience and expertise in serving K-12 districts with programs similar to the needs of the School District. Our team members are fluent in DSA, CDE, and OPSC programs and requirements, including Public Contract Code, CEQA, Career Technology and Joint-Use Facilities. RGM and Associates supports a "green commitment" and is a proud member of the U.S. Green Building Council (USGBC) and the Collaborative for High Performance Schools (CHPS).

RGM currently has a staff of 42 full-time employees, including 23 project managers, and has maintained continual, controlled growth bringing in new personnel with diverse educational and job-related experience in architecture, engineering, construction, and business and construction management.

RGM specializes in hands-on project management and tailors its services to the unique culture and needs of each district and its facility program.

Since 2007 **RGM and Associates** has been collaborating with **Kramer Project Development Company, Inc., (KPDC)** on various projects serving both company's clients. Established in 2003 and located in San Jose, KPDC has a staff of seventeen (17) and has established an impressive portfolio constructing school facilities and managing bond programs. Detailed information regarding KPDC can be found following this page.

## Partner Firm (merger in process)

**Kramer Project Development Company, Inc., (KPDC)** staff maintains a diverse range of experience and skill in facility planning, facility assessments, project development, financial management, design management, cost estimating, facilities management, dispute resolution and distressed project recovery. They maintain strategic partnerships with various technical and design consultants to provide specific expertise when needed. KPDC has partnered with RGM and Associates for staffing, management support in addition to providing comprehensive construction services.



If the District's projects require an increased and intense level of staffing, for the duration of the project, or only for peak construction periods, RGM can rely on the resources of Kramer Project Development Company to provide experienced staffing support.

"Kramer Project Development Co. Inc. (KPDC) was incorporated in May of 2003 and maintains a strict philosophy of providing the highest level of program and project management service to only a select few clients. We don't actively market, we have a stable group of school district clients that continue to request services, sustain our company and actually do all of our marketing for us. Our founder, Rick Kramer, considers himself a builder first and ensures he is personally involved in every program and project the company manages. The Kramer staff is well credentialed and provides the same high degree of effort needed to successfully complete the work to Rick's standards. We have experience delivering projects under all established delivery models and will help guide you to select the most appropriate delivery method for each project."

Kramer Project Development Co. Inc. was established in 2003 as an S corporation C2434147, EIN 72-1563824. We operate the firm under California Architects License C23943. We are affiliated with the American Institute of Architects, The National Council of Architectural Registration Boards, The International Facility Management Association, The US Green Building Council and The California Coalition for Adequate School Housing.

### **Rick Kramer, AIA, LEED AP—Company President / Program Manager**

Rick has extensive experience in all phases of facility management, design and construction. Rick served as a Navy Civil Engineer Corps Officer, managed Stanford University's Housing Capital Improvement Program and managed construction for a general contractor before starting his first construction management business. Over his 30-year career Rick has managed construction programs totaling approximately \$1.4 billion dollars, the past 16 years of which he has focused on K-12 school construction programs. Rick possesses two degrees in Architecture and an MS in Construction Engineering from Stanford University and is a California licensed architect. In addition to his architectural licenses, Rick is also a LEED accredited professional, an adjunct professor for the Department of Civil Engineering at San Jose State University and is a certified building safety evaluator for the California Governor's Office of Emergency Services.



## EXPERIENCE AND COMMUNITY

RGM and Associates experience and expertise includes effectively working and communicating with a variety of stakeholders such as District and site administration and staff, State and Local regulatory agencies, consultants, contractors and vendors, community groups, Citizen Bond Oversight Committees and Governing Boards. RGM understands the types of concerns that are typically posed by staff and community groups and can guide the District in effectively addressing them. RGM is skilled in helping Districts identify the key decision points and in helping the entire school community throughout the planning and construction processes.

Our combined team considers regular communication and coordination meetings with regulatory agencies, advisory committees and decision makers essential to a successful project. Throughout the final design phase and construction process we will support the District by facilitating communication and coordinating meetings with the District, project site administration and staff, Facilities, Maintenance and Operations, and other user groups. Our philosophy advocates transparency, honesty, integrity, responsiveness and helpfulness. These

characteristics of the firm allow our team to respond in fluid and dynamic ways to the unique challenges of the District.

We routinely attend Board meetings and present project status reports, budget updates, bid award and change order recommendations, and other Board agenda items. We can be “front and center” or work in the background providing support to the facilities or business staff for any public administrative reporting or accounting presentations. RGM attempts to work pro-actively with all the parties associated with a project. Our fundamental role is to facilitate the design and construction processes through detailed planning and communication efforts.

Our program management services emphasize the facilitation of our clients’ decision-making processes and the determined execution of their vision. Whether selecting and managing architects and builders, or maintaining control over quality, cost, and schedule, our role is to ensure that our client’s performance criteria are met in every aspect.

Before



John Swett High School, John Swett Unified School District

After



John Swett High School, John Swett Unified School District



## SERVICES

### PLANNING AND PRE-CONSTRUCTION SERVICES

- Site Evaluations/Feasibility Studies
- Facility Condition Assessments
- Consultant Team Selection/RFP Process
- Planning and Design Management
- OPSC Planning & Facilitation
- Consultant Team Coordination
- Permit Coordination
- Design/Public Meetings Facilitation
- Cost Estimates
- Master Budget Compilation and Review
- Contract & Constructability Reviews
- Value Engineering Analysis
- Schedule Development and Phasing Analysis
- District-Wide Standards & Procedures
- Contractor Pre-Qualification
- Standardized Bond & Insurance Requirements
- Preparation of Bid Documents
- District-Tailored Contracts
- Project Manual Compilation

### CONSTRUCTION/POST CONSTRUCTION SERVICES

- Bid Process Management
- On-site Project Management
- Contract Administration Services
- Quality Assurance/Testing and Inspection Oversight
- Project Progress and Financial Reports
- Project Documentation Controls
- Project Schedule Management
- Progress Meeting Coordination
- Labor Compliance Program Administration
- Change Order Analysis and Negotiations
- Warranty Analysis and Coordination
- PLA Coordination
- OPSC Close-out Audits & Substantial Progress Reporting
- Claims Analysis & Mitigation
- Contract Closeout Assistance (OPSC/DSA)

### REPRESENTATIVE LIST OF CLIENT SCHOOL DISTRICTS

- Alhambra SD
- Acalanes Unified HSD
- Amador County Office of Education
- Amador County Unified SD
- Antioch Unified SD
- Bellevue Union SD
- Benicia Unified SD
- Bennett Valley Union ESD
- Berryessa Union SD
- Brentwood Union SD
- Byron Union SD
- Calistoga Joint Unified SD
- Cloverdale Unified SD
- Contra Costa County Office of Education
- Contra Costa Community College District
- Dixon USD (Facility Assessments)
- Dublin USD
- Forestville Union SD
- Galt Joint Union HSD
- Guerneville Unified SD
- Geyserville USD
- Heber SD (Planning Consulting)
- Horicon Elementary SD
- Jefferson Elementary SD (Tracy)
- Jefferson SD (Daly City)
- John Swett Unified SD
- Kenwood ESD
- Lafayette SD
- Live Oak SD
- Livingston Union SD
- Mark West Union SD
- Martinez Unified SD
- Menlo Park City SD
- Merced Union High SD
- Monterey Peninsula SD
- Moraga SD
- Napa Valley Unified SD
- Oak Grove Union SD
- Oakland Unified SD
- Oakley Union ESD
- Orinda Unified SD
- Piner-Olivet Union SD
- Pioneer Union SD
- Pittsburg Unified SD
- Pope Valley Union SD
- Portola Valley Elementary SD
- Red Bluff Joint Union HSD
- Redwood City Union SD
- River Delta Joint Unified SD
- San Leandro Unified SD
- San Lorenzo Valley Unified SD
- San Mateo County Office of Education
- San Ramon Valley Unified SD
- Sebastopol Union ESD
- Sonoma County Office of Education
- Sonoma Valley Unified SD
- Tracy Unified SD
- Twin Hills Union High SD
- West Contra Costa Unified SD
- West Sonoma County Union High SD
- Winters Joint Unified SD



**Staffing Requirements:**

- Ralph Caputo/Jon Novero
- Rich Dunlap
- John Hansen/Eric Scheuermann
- Jalil Bazyar
- Marlin Jones/Greg Lykken
- Gino Elliott /Matt Medeiros
- Dave Adams
- Andrea Noble
- Susan Kettlewell

**Principal Oversight**  
**Sr. Project Manager**  
**Project Managers**  
**Sr. Project Manager**  
**Sr. Project Manager**  
**Sr. Project Managers**  
**Project Engineer**  
**Sr. Program Manager**  
**Contracts Manager**

**Program Management Support**  
**Project Executive**  
**Construction Management**  
**Program Management/Estimating**  
**Program Management/Estimating**  
**Constructability Reviews/Scheduling**  
**Construction Management Support**  
**OPSC Funding Support**  
**DSA Legacy Closeout/Labor Compliance**

**Project Executive/Program Manager**

Ralph Caputo/Jon Novero will provide principal oversight and assist the District develop the program, construction management and implementation plans, procurement strategies and analysis. Ralph and Jon can be available to support district staff with Board and Bond Oversight Committee Meetings, routine and special updates, community outreach and steering meetings, as needed.

**Project Management**

RGM has highly qualified project executives, project managers, project engineers and administrative support staff ready to assist the District with project management, construction administration and closeout responsibilities. We will staff as appropriate in coordination with the Director of Facilities and CBO and adjust as construction needs change. Rich Dunlap, Project Executive, John Hansen and Eric Scheuermann, Project Managers, will provide project management and supervise administrative support staff and field engineers that may be used during peak periods. They will review the front-end and technical documents and offer suggestions to improve project specific supplemental conditions and help develop construction phasing and coordination planning. Dave Adams, Project Engineer will provide construction support.

**Administrative Support**

Under supervision of the program manager(s), RGM’s administrative support staff will prepare bid documents, maintain contract documents and files, issue plans, solicit bidder interest, track Submittals, RFI’s, Change Orders, payments and waivers, and facilitate prompt project closeout.

**Estimating Services**

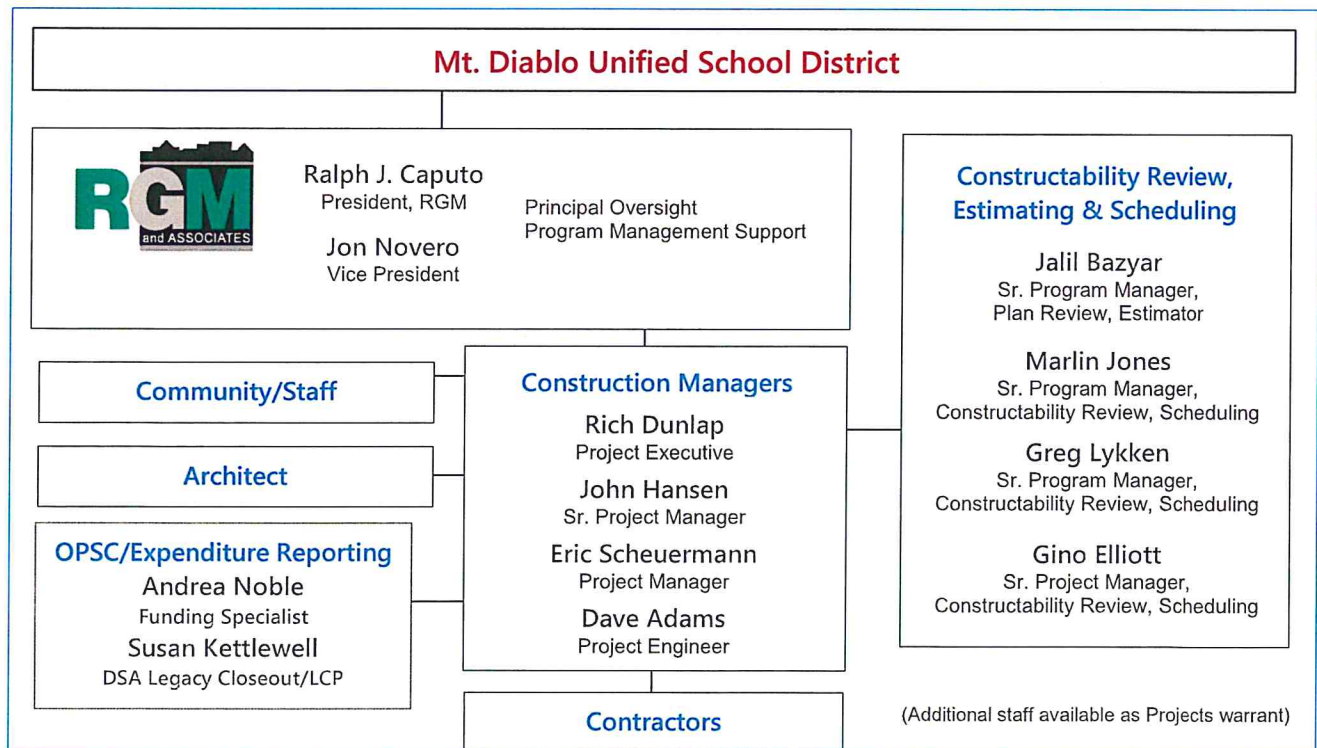
Jalil Bazyar, Marlin Jones and/or Greg Lykken will provide program budgeting, assist with planning, procurement and implementation strategies, and can provide comprehensive detailed cost estimating services. RGM team may also provide Program support as needed and additional grant requests for Service Site Development for OPSC New Construction projects, Fire-Life-Safety and Access compliance estimates for OPSC Modernization projects.

**Constructability Reviews and Scheduling**

Gino Elliott would provide Constructability Reviews and Matt Medeiros will provide project scheduling.

**OPSC Expenditure Reporting/Legacy DSA Closeout**

Andrea Noble is familiar with the OPSC funding program requirements, as well as DSA criteria, and can provide support and assistance to your funding consultant and design team. Susan Kettlewell will work toward DSA certification for Legacy Projects.





**Memberships:**

- Coalition for Adequate School Housing
- Institute for Conflict Management
- Association of California Construction Managers
- Dispute Review Board Foundation

**Ralph J. Caputo, President, Principal Oversight**

Bachelor of Arts, Teaching Credential, California State University, Sonoma 1979  
 California Contractor's License #654117, Class B  
 Advance Arbitration Certificate Program - 2000  
 Construction Mediation and Dispute Resolution Certificate Programs -1998, 1999  
 Contractors State License Board Arbitrator, Arbitration, Mediation & Conciliation Center, Arbitration Works - 2000 to 2008

Ralph Caputo has been involved in the construction industry for over 37 years. He Founded RGM 30 years ago. Now he oversees the daily operations and financial responsibilities of the corporation and provides general planning and leadership for a diverse range of projects. Ralph becomes involved with the District's administrative staff and Architect in defining key roles and will help tailor a Construction Planning and Management Program specific to the needs of the District and can offer valuable assistance with community presentations.

Ralph's considerable training and experience in dispute resolution is an invaluable resource, and he frequently assists Districts and legal counsel in analyzing troubled projects and to help mitigate issues. Ralph also provides comprehensive program and planning services and oversees project management teams.

**Selected Experience Includes:**

- Principal Oversight & Bond Program Planning - Monterey Peninsula School District - \$275M
- Principal Oversight & Bond Program Planning - Redwood City School District - \$193M
- Principal Oversight & Bond Program Planning - Oakland Unified School District - \$475M
- Principal Oversight & Bond Program Planning - Menlo Park City School District - \$138M
- Principal Oversight - Antioch Unified School District - \$330M
- Principal Oversight - Redwood City School District - \$22M
- Principal Oversight - Berryessa Union School District - \$23.3M
- Principal Oversight & Bond Program Management - John Swett Unified School District - \$52M
- Principal Oversight & Bond Program Management - River Delta Unified School District - \$46M

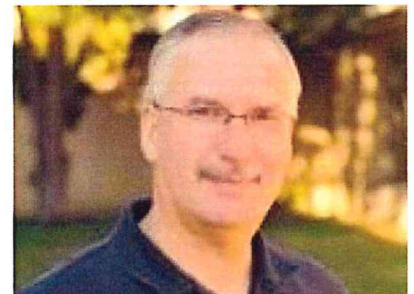
**Jon Novero, V.P. Operations/Secretary,  
 Principal Oversight and Planning Assistance**

Bachelor of Science, Construction Management; Minor, Business Administration  
 California State University, Sacramento, 1987  
 Partnering Facilitations Certificate, 2002

In addition to managing projects and guiding the administrative staff, Jon aids in overseeing the operations of the corporation. He is an excellent administrator who demonstrates a well-rounded knowledge of the planning and construction process. His expertise during the planning phase includes planning and program setup, developing RFP's for other consultant needs, development of master budgets, coordination of cost estimates, constructability reviews, and bid package preparation. During construction phases, Jon exhibits proficiency in procedural guidelines, Contract Administration, Change Order review, and dispute resolution. In addition, he has assisted districts with site acquisition and offers a thorough knowledge of approval processes associated with DTSC, CEQA, CDE, OPSC, and DSA.

**Selected Experience Includes:**

- Program and Principal Oversight - Martinez Unified School - \$70 Bond Programs
- Program and Principal Oversight - Brentwood Union School - \$104.3 M Bond Programs
- Program and Principal Oversight - Lafayette Unified School - \$34M Bond Programs
- Program and Principal Oversight - Martinez Unified School - \$30M and \$45M Bond Programs
- Program and Principal Oversight - Contra Costa County Office of Education - \$3.6M



**References:**

Contra Costa County  
 Office of Education  
 John Hild  
 Director General Services  
 (925) 942-3333  
[jhild@cccocoe.k12.ca.us](mailto:jhild@cccocoe.k12.ca.us)

Martinez USD  
 Helen Rossi, Chief Business Officer  
 (925) 335-5925  
[hrossi@martinez.k12.ca.us](mailto:hrossi@martinez.k12.ca.us)

Brentwood Union SD  
 Dana Eaton, Superintendent  
 (925) 513-6300  
[deaton@brentwood.k12.ca.us](mailto:deaton@brentwood.k12.ca.us)



**Richard Dunlap, Senior Project Manager/Scheduler**

Bachelor of Science, Construction Management, California State University, Chico, 1993  
Associates of Arts in General Education, Santa Rosa Jr. College, 1988

In 1998, Richard joined RGM and has been providing project management services for clients throughout Northern California. He is responsible for specification and plan review, contractor and subcontractor solicitation, detailed estimating submittal review, tracking and procuring materials, scheduling, contractor coordination, and overall project management. In the eleven years prior to joining RGM, Richard worked his way up the ladder with a large general contractor specializing in K-12 educational facilities as a project engineer, draftsman, carpenter, project manager and estimator. He has extensive experience as a "hands-on" site superintendent, estimator and project manager.

**References:**

Mark West Unified School District  
Michael Smith  
Dir. of Maint. & Operations  
(707) 524-2993

Antioch Unified School District  
Tim Forrester, Retired Assoc. Superintendent-Bus & Ops.  
(925) 382-8826  
[timothyforrester@comcast.net](mailto:timothyforrester@comcast.net)

Kenwood School District  
John Magnoli  
Dir. of Maintenance  
(707) 478-8293  
[imagnoli@kenwoodschool.org](mailto:imagnoli@kenwoodschool.org)

**Selected Experience Includes:**

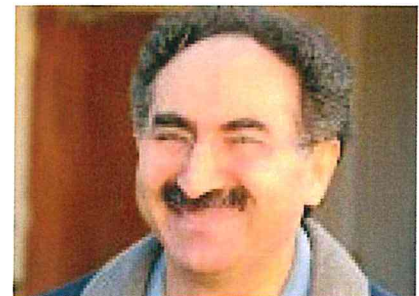
- Project Manager - Modernization - Moraga Unified School District - \$33M
- Project Manager - Modernization - Mt Diablo Unified School District - \$5M
- Project Manager - Modernization - Mark West Union School District - \$14M
- Project Manager - Modernization - Antioch Unified School District - \$56M
- Project Manager - New Stadium/Track/Field/Admin/Library - Antioch Unified School District - \$19.9M
- Project Manager - New Campus - Pittsburg Unified School District - \$30.1M
- Project Manager - Campus Reconstruction - Pittsburg Unified School District - \$74M



**Jalil Bazyar, Senior Program/Project Manager/Estimator**

Bachelor of Science, Civil Engineering, Mississippi State University 1980  
California-Licensed Professional Engineer, Civil, C70799  
California-Licensed Qualified SWPPP Developer, (QSD) C70799  
California-Licensed Qualified SWPPP Practioner, (QSP) 25756  
California-Licensed Contractor B and C21. CSL #590222

Jalil has been involved in public sector construction industry for over thirty-five years, with emphasis in construction, estimating, project and construction management and civil engineering. He is also experienced and skilled in working with architects, engineers and local agencies, such as fire districts, public works departments, building and utility districts. Jalil is equally proficient as an Estimator, Program and Project Manager. Jalil provides conceptional and hard dollar estimates, scheduling, plan and specification reviews, change order analysis and contract negotiations. Currently, Jalil is managing multiple public school projects which involve lease-leaseback, design build and hard bid contracts



**References:**

Contra Costa  
Community College District  
Peter Garcia, President, Retired  
(925) 685-1230  
[pgarcia@dvc.edu](mailto:pgarcia@dvc.edu)

Contra Costa County  
Office of Education  
John Hild, Director  
General Services  
(925) 942-3333  
[jhild@cccoc.k12.ca.us](mailto:jhild@cccoc.k12.ca.us)

Lafayette Unified School District  
Richard Whitmore, Superintendent  
(925) 927-3500  
[rwhitmore@lafsd.org](mailto:rwhitmore@lafsd.org)

**Selected Experience Includes:**

- Program and Principal Oversight - Lafayette Unified School - \$70M Bond Programs
- Program Manager - Modernization - Berryessa Union School District - \$7.0M
- Project Manager - Modernization - Contra Costa Community College District - \$28M
- Project Manager - Modernization - Orinda Unified School District - \$60M
- Project Manager - Modernization/New Construction (3) Sites - Contra Costa County Office of Education - \$6.4M

### John Hansen, Project Manager/Superintendent

Traditional or Multi-Prime Construction  
California Contractor's License # 389643

John started in the construction industry in 1975 and received his California General Contractor's license in 1980. He completed numerous construction projects including light commercial buildings before joining RGM. John provided his expertise to firms involved in hill side stabilization, landslide repair and public works projects.

John worked as a superintendent, while RGM was still involved in public and private construction projects as a General Contractor then formed his own contracting company. John's expertise in management, supervision, scheduling, material procurement, and change order analysis was critical to the completion of seven Emergency Repair Projects, and athletic field improvements, including site work, new synthetic turf, and new bleachers and scoreboards at John Swett High School. He assisted in identifying a Facility Hardship project at the High School helped obtain a \$3.5 Million approval from the OPSC.

John worked with Dublin Schools staff and school board to assess needs. He Prepared RFP's for selection of Architectural and Design Firms. He satisfied DTSC requirements for a new campus while coordinating with the City of Dublin for offsite improvements. John was also responsible for Department of State Architecture approvals and coordination, review of Lease, Lease-Back, hard bid contracts and project delivery methods. He was also in charge of campus furnishings and first day ready requirements.

#### Selected Experience Includes:

- New J.M. Amador Elementary School Campus, Dublin Unified School District - \$57M
- New Cottonwood Creek K-8 School Campus, Dublin Unified School District - \$64M
- Site Improvements and Modernization, Jefferson School District - \$2.1M
- New Athletic Facilities and Emergency Repairs Projects, John Swett High School - \$8.3M
- Modernization, Pittsburg High School, Creative Arts Building - \$7M
- Modernization, Foothill Elementary School, Multi-Prime - \$4M



#### References:

California Design West  
Les Smith, Project Architect  
(916) 446-2466

Jefferson School District  
Jim Bridges, Superintendent  
(209) 836-2288

Dublin Unified Schools  
Kim McNeely  
Executive Director of  
Facilities  
(925) 570-5032



### Eric Scheuermann, Project Manager

Construction Estimator/Project Manager Certification 1993  
American Society of Professional Estimators

Eric has over 25 years of experience in the construction industry. He developed his initial skills through the trades, progressing from laborer to apprentice carpenter to journeyman carpenter, prior to joining RGM and Associates in 1997. Since joining RGM, Eric has proven his administrative capabilities and has filled a variety of roles, which include performing constructability reviews, estimating and construction project management. The management skills he has learned, together with his hands-on experience and technical background, enable him to communicate well with any individual involved in the construction process. Eric has assembled numerous formal and informal bid packages for direct trade bidding for new construction, modernizations, landscaping, asphalt paving, HVAC, painting, and demolition projects for several of RGM's client districts.

#### Selected Experience Includes:

- Project Manager - New Construction - Laurel School Upper Campus - Menlo Park City School District - \$25M
- Project Manager - Modernization/New Construction (6) Sites - Oakland Unified School District - \$47.7M
- Project Manager - Modernization - Various District-Wide Projects - Redwood City School District - \$22M
- Project Manager - Modernization - Various District-Wide Projects - Burlingame School District - \$53K
- Assistant Project Manager, Plan Reviewer - Various District-Wide Projects - Antioch Unified School District - \$38M

#### References:

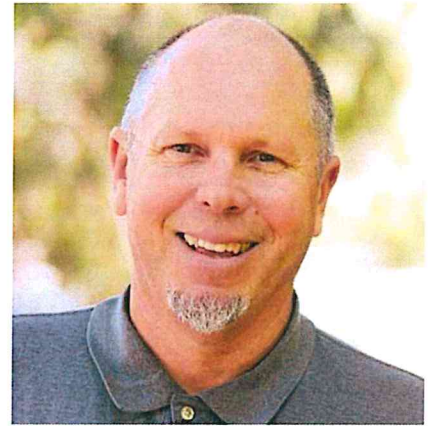
Oakland Unified School District  
Tadashi Nakadegawa  
Director of Facilities  
(510) 535-7038  
[Tadashi.nakadegawa@ousd.k12.ca.us](mailto:Tadashi.nakadegawa@ousd.k12.ca.us)

Menlo Park City School District  
Ahmad Sheikholeslami, CBO  
(650) 321-7140  
[asheikholeslami@mpcsd.org](mailto:asheikholeslami@mpcsd.org)

Antioch Unified School District  
Tim Forrester, Retired Assoc.  
Superintendent-Bus & Ops.  
(925) 382-8826  
[timothyforrester@comcast.net](mailto:timothyforrester@comcast.net)

**Dave Adams, Project Engineer, Project Coordinator, Project Superintendent**

Dave has been active in public and private sector construction for more than 30 years and possesses a broad-based knowledge of building practices. He has “in the trenches” expertise developed through years of experience working in various trades including Pipefitter, Carpenter and Heavy Mechanic. His career with RGM and Associates began in 1998 and over the years he has assumed numerous and varied roles, which continue to evolve. He is active in Project Management, SWPPP Monitoring, Labor Compliance Monitoring and acts as Construction Project Superintendent. Dave is adept at communication, keeping clients informed, contractors on track, and assisting to resolve issues and keep projects on time and on budget. Dave has demonstrated his ability to complete fast-track projects, including their inevitable issues, with minimal change orders and added expense. His involvement with numerous RGM client districts has included new construction, modernization, landscaping, asphalt paving, roofing, Proposition 39 Energy Retrofits, HVAC, painting, and demolition projects.



**References:**

Antioch Charter Academy  
Todd Heller  
(925) 914-9293  
[dohg@aol.com](mailto:dohg@aol.com)

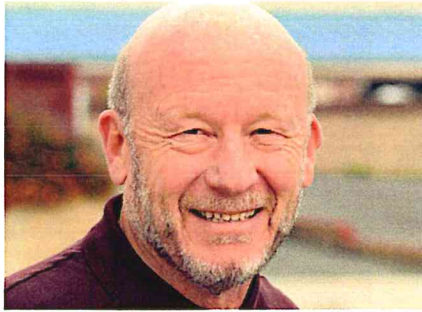
Menlo Park City School District  
Ahmad Sheikholeslami, CBO  
(650) 321-7140  
[asheikholeslami@mpcsd.org](mailto:asheikholeslami@mpcsd.org)

**Selected Experience Includes:**

- Project Engineer - Solar All District Sites - Martinez Unified School District
- Project Engineer - Alhambra HS Hillside Stabilization - Martinez Unified School District
- Asst. Project Superintendent - Jefferson School Replacement - Jefferson School District
- Project Engineer - Proposition 39 Energy Projects - Charter Academy
- Project Engineer - Various District-Wide Projects - Antioch Unified School District
- Project Engineer - Various District-Wide Projects - Galt Joint Union HS District
- Project Engineer - 18 Restroom Modernization - Mt Diablo Unified School District
- Project Engineer - District Wide Paving & Hardscape - Mt Diablo Unified School District
- Project Engineer - Various Modernization Projects - Moraga School District



Antioch High School, Antioch Unified School District



### Marlin Jones, Senior Program/Project Manager, Estimator

Bachelor of Science, Architecture and Political Science, University of Kansas

Marlin Jones has been involved in many facets within the construction industry for 49 years and is one of RGM's most valued and resourceful managers. He provides general bond program and specialized project oversight. As a Senior Project Manager with RGM, Marlin manages construction projects in all phases, from planning to close-out. He provides expertise in developing project schedules and budgets. Marlin also performs conceptual and detailed cost estimates, plan reviews and change order analysis. He is experienced in working directly with local agencies such as the Health Department, Utility Districts, Fire Districts and Public Works departments.

#### References:

San Mateo County Office of Ed.  
Denise Porterfield  
Deputy Superintendent  
(650) 802-5512  
[dporterfield@smcoe.k12.ca.us](mailto:dporterfield@smcoe.k12.ca.us)

Contra Costa County Office of Ed  
John Hild  
Director II - General Services  
(925) 942-3333  
[jhild@cccocoe.k12.ca.us](mailto:jhild@cccocoe.k12.ca.us)

Antioch Unified School District  
Tim Forrester, Retired Assoc.  
Superintendent-Bus & Operations  
(925) 382-8826  
[timothyforrester@comcast.net](mailto:timothyforrester@comcast.net)

#### Selected Planning and Construction Management Experience:

- Measure B Bond Program Management - Antioch Unified School District \$52.5M
- Project Manager - New Stadium/Track/Field/Admin/Library - Antioch High School - Antioch USD - \$19.9M
- Program Manager - Measure C Bond Program - Antioch Unified School District - \$56.5M
- Program Manager - Measure C Bond Program - Antioch Unified School District - \$61.7M
- Program Manager - New Campus Dozier Libbey Medical High School - Antioch Unified School District - \$20M
- Program Manager - New Campus Orchard Park School - Antioch Unified School District - \$18.3M

### Greg Lykken, Project Manager/Estimator and Plan Review

Associate of Applied Science in Architectural Drafting and Estimating, North Dakota State College of Science, 1977  
Certified Professional Estimator, American Society of Professional Estimators 2002-2006

Greg has more than 40 years' experience in the construction industry in all facets of construction estimating and project management. His experience includes quantity surveys, estimating, material procurement, customer service and estimating department management. Greg has provided project management services for site work, commercial and industrial building, modular building and public works projects. As an RGM project manager since 2004, Greg manages projects in pre-construction and construction phases. He provides expertise in developing project schedules and budgets. He is meticulous about organizing meeting minutes, logs, reports, and other job files. Greg provides estimating and plan review services for many RGM clients, including the Menlo Park City, John Swett Unified, Pittsburg Unified, Tracy Joint Unified, and Martinez Unified School Districts. Greg provides accurate and reliable cost information to our clients while preparing facility conditions assessments totaling hundreds of millions of dollars for Antioch USD, Los Gatos USD, Menlo Park USD, Red Bluff Joint USD, and Redwood City SD, allowing them to make informed decisions about budgets and cash flow. Greg is a meticulous plan and specification reviewer. His reviews ensure that bid sets are biddable and buildable.

#### Selected Experience Includes:

- Principal Oversight - Jefferson Elementary School District, Daly City - \$21.5M
- Project Manager - New Campus - Horicon Elementary, Annapolis, CA - \$6.5M
- Project Manager - Modernization - Martinez Unified School District - \$4.9M
- Project Manager - New Modular Classrooms - Sonoma County Office of Education - \$4.2M
- Project Manager - Modernization - County of San Mateo-Dept. of Housing - \$1.6M
- Project Manager - Modernizations - West County Transportation Agency - \$4M
- Project Manager - Modernizations - San Mateo County Office of Education - \$6M

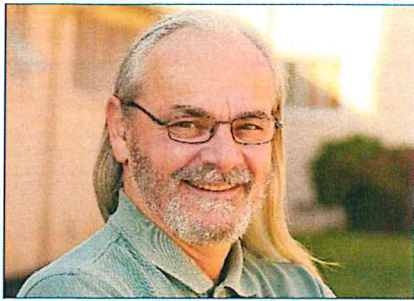


#### References:

San Mateo County Office of Ed.  
Denise Porterfield  
Deputy Superintendent  
(650) 802-5512  
[dporterfield@smcoe.org](mailto:dporterfield@smcoe.org)

West County Transportation Agency  
Michael Rea, Former Exec Director  
(707) 210-2182  
[mikerea22@gmail.com](mailto:mikerea22@gmail.com)

Jefferson Elementary School District  
Bill Heath, Dir. of Facilities  
(530) 520-5435  
[bheath@jeffersonesd.org](mailto:bheath@jeffersonesd.org)



### **Gino Elliott, Senior Project Manager/Superintendent/Construction Review**

California Contractor's License #65411

ACIA (Inspector) #5398

With more than 40 years' experience in the construction industry and co-founder of RGM, Gino Elliot brings extensive public school construction and management experience to Districts. Gino assists the design team assess facilities and provides constructability review services. Gino has been one of the primary team members in numerous large programs and is highly experienced with General and Specialty Construction, multiple prime contracting, Lease Leaseback and managing concurrent projects. Gino provides oversight and support to RGM Project Management staff.

#### **References:**

Contra Costa County  
Office of Education  
John Hild,  
Director, General Services  
(925) 942-3333  
[jhild@cccoe.k12.ca.us](mailto:jhild@cccoe.k12.ca.us)

Jefferson School District  
James W. Bridges  
Ed..D. Superintendent  
(209) 836-2930  
[jbridges@sjcoe.net](mailto:jbridges@sjcoe.net)

Menlo Park City SD  
Ahmad Sheikholeslami  
(650) 321-7140  
[asheikholeslami@mpcsd.org](mailto:asheikholeslami@mpcsd.org)

#### **Selected Experience Includes:**

- Jefferson School - Jefferson School District - \$19.8M
- New Gymnasium and Performance Center, Anthony Traina School - Jefferson School District - \$4.6M
- Campus Reconstruction, Pittsburg High School - Pittsburg Unified School District - \$74M
- New Campus, Marina Vista Elementary School - Pittsburg Unified School District - \$18M
- Modernization, Central and Hillview Jr. High School - Pittsburg Unified School District - \$8.8M
- Modernization/New Construction (16) Sites, Bond Program - Redwood City School District - \$22M
- Modernization, Redwood, Silverado, and Ridgeview Middle School - Napa Valley Unified School District - \$6.8M
- Deer Valley High School - Antioch Unified School District - \$63M

### **Mathew Medeiros, Construction Review/Scheduler**

Bachelor of Science, Mathematics and Secondary Education, Western Washington University, 1996

LEED Certification

For the last 22-years Matt has held a variety of positions in the Construction and Construction Management industry. He has extensive experience in Construction Review and Scheduling as well as Project Management. He also has experience in Cost Estimating, Value Engineering, Standard Reporting Procedures and Project Delivery. He is also well versed in all other areas of Construction Management, Construction Processes, Documentation and Client Relations. In addition to this Matt is LEED Certified.

#### **References:**

Broward Builders, Inc.

Echo Pacific Construction  
Escondido, CA

Stone Cheney Construction  
Modesto, CA

#### **Selected Experience Includes:**

- K-8 Schools: Elk Grove Unified School District, San Diego City Schools, Laguna Unified School District, Hemet Unified School District, Mount Diablo Unified School District, Pittsburg Unified School District, Dublin Unified School District.
- K-12 Schools: San Diego City Schools, Pittsburg Unified School District, Benicia Unified School District
- K-14 Schools: Yosemite Community College District, Los Rios Community College District.



### Andrea Noble, Senior Program Manager/Funding and Planning Assistance

Bachelor of Arts, University of California, Santa Cruz, 1971  
Construction Management Certification, Santa Rosa Jr. College, 1988  
California Contractor's License #649672



Andrea began her career in construction in 1990. Since joining RGM in 1997, Andrea has acted as a Bond and Construction Manager for numerous K-12 programs and provides facility assessments, master planning, OPSC liaison and budget management services. During her tenure, Andrea has acquired particular expertise in bond planning and State funding programs. She was instrumental in providing Needs Assessments for the John Swett Unified School District's successful bond measure. She also wrote grants which obtained \$6M dollars in Emergency Repair funding, \$ 2.1M in Facility Hardship funding, \$4M in Growth and \$4M in Modernization funding for the district. She has special expertise in Facility Hardship appeals and has been successful with diverse funding sources as the Greenhouse Gas Reduction Grants, Prop 84 Clean Drinking Water grants, Career Technology grants and the Underground Storage Tank Clean-up funds. Andrea provides funding services, including preparation of CDE and OPSC documentation for SFP projects, OPSC Expenditure Reports and represents school districts during the SFP closeout and audit processes.

#### Selected Experience Includes:

- Program Manager - Measure S Bond Program Planning - Benicia Unified School District - \$49.6M
- Program Manager - Measure K Bond Program - Oak Grove Union School District - \$6M
- Program Manager - Measure A Bond Program - Pope Valley UESD - \$ 4M
- Program Manager - Measure A Bond Program - John Swett Unified School District \$46.1M
- Project Manager - Geyserville Modernization - Geyserville Unified School District - \$3M
- Program/Project Manager - Sonoma Valley Unified School District - \$8.6M (Various Projects)
- Program/Project Manager - Jack London ES - Piner-Olivet Union School District - \$15 M
- Program Manager - Modernization & New Construction - West Sonoma County Union High School District - \$25M

#### References:

Oak Grove Union School District

Debbie Costello, CBO  
(707) 545-0171  
[dcostello@ogusd.org](mailto:dcostello@ogusd.org)

Sebastopol Union School District

Linda Irving, Superintendent  
(707) 829-4570  
[irving@sebusd.org](mailto:irving@sebusd.org)

Pope Valley UESD

Ken Burkhart, Supt  
(707) 965-2402  
[kburkhart@pvk8.org](mailto:kburkhart@pvk8.org)



### Susan Kettlewell, DSA Legacy Project Closeout/Labor Compliance Manager

Bachelor of Fine Arts, California College of the Arts, Oakland, 1985  
Leadership Management Certificate, University of the Pacific, 2000  
Labor Compliance Program Training for California Public Works, Fresno City College, 2007

Since joining RGM and Associates more than 11 years ago, Susan has demonstrated proficiency in interpreting the complexities of labor compliance legislation and its application to public works construction. A trusted compliance resource, she is tasked with keeping abreast of and disseminating the most current and critical prevailing wage compliance legislation, regulations, and standards. Her expertise in state and federal wage regulations is invaluable to RGM and its clients, and she is often called on to provide guidance and training to project owners, contractors, colleagues, and others regarding prevailing wage standards, specifications, and labor compliance program "best practices" procedures. Most recently, Susan has turned her attention to assisting school districts with identifying projects that did not receive Division of State Architect (DSA) certification at the completion of construction ("legacy projects"). She is persistent and adept at investigating and identifying documentation and processes necessary for certification, and is able to work closely with the district, DSA, architects and others to accomplish the arduous task of certifying legacy projects.

#### References:

Redwood City School District

Donald Dias, Bond Program Director  
(650) 423-2261  
[ddias@rcsdk8.net](mailto:ddias@rcsdk8.net)

Napa Valley Unified School District

Jennifer Gibb, Facilities Financial Analyst  
(707) 253-6281  
[jgibb@nvusd.org](mailto:jgibb@nvusd.org)

#### Selected Experience Includes:

- Legacy Closeout – Redwood City School District
- Legacy Closeout – Monterey Peninsula Unified School District
- Labor Compliance Manager – Napa Valley Unified School District
- Labor Compliance Manager – Menlo Park City School District
- Labor Compliance Manager – Tracy Unified School District



March 7, 2019

Mt. Diablo Unified School District  
Attn: Rose Ramos, Chief Business Officer  
2326 Bisso Lane  
Concord, CA 94520

Re: Financial Stability Comfort Letter for RGM and Associates, Inc.

My name is Chrystal England and I am the managing partner for England Financial Corporation. My California State CPA license number is 73159. I have performed an independent accountant's review of the financial statements for RGM and Associates for the years ended December 31, 2015 and 2016. Based on my review, I am not aware of any material modifications that should be made in order for them to be in conformity with accounting principles generally accepted in the United States of America.

The standards of my profession prohibit me from making assurances relating to solvency; however, I am permitted to provide the following information based on my independent review:

	<u>2017</u>	<u>2016</u>
CURRENT ASSETS	2,848,049	2,669,038
CURRENT LIABILITIES	1,165,543	1,131,858
EARNINGS BEFORE INCOME TAXES, DEPRECIATION AND AMORTIZATION (EBITDA)	455,243	492,068

Additionally, an unsecured line of credit in the amount of \$1,000,000 is available. The balance at December 31, 2017, and December 31, 2018, was zero.

R.G.M. and Associates, Inc., is a California Corporation, and was incorporated February 11, 1987, as a closely held corporation. The company operates as a construction manager and general contractor primarily in the Public K1 2 School Districts for over 26 Years. The Company's gross income exceeded \$8M in both 2017 and 2018, and the income from their business has provided for the needs of the Company.

As you know, a contract-granting decision should be based on exercise of due diligence in considering many factors. Your use of this letter from me, and the reviewed financial statements or other documents prepared by me, in the exercise of your due diligence is solely a matter of your responsibility and judgment.

Sincerely,

*Chrystal England*

Chrystal England, CPA  
England Financial Corporation



March 13, 2019

Mt. Diablo Unified School District  
2326 Bisso Lane  
Concord, CA. CA 94520

RGM & Associates, Inc.

To Whom it May Concern:

This letter is to confirm that we, Ridgemark Insurance Services, Inc., are the current insurance agent/broker for RGM & Associates, Inc. We have reviewed the insurance requirements within the construction management agreement, and we believe the current insurance program in place for RGM & Associates, Inc. is satisfactory.

We represent the insurance companies listed on the certificate of insurance. We are authorized to provide the coverage information listed on the certificate as well as the attached endorsements; and to confirm that coverage is bound, in force and in good standing.

Please contact us if any further information is needed.

Sincerely,

Lindsay Roden, CIC  
Director of Client Relations



## LEGAL REFERENCES:

### Roy A. Combs & Mark Williams

Fagen Friedman & Fulfrost LLP  
70 Washington Street, Ste. 205  
Oakland, CA 94607  
(510) 550-8220  
rcombs@fagenfriedman.com  
mwilliams@fagenfriedman.com

### Mark Kelley & Marilyn Cleveland

Dannis Woliver Kelley  
275 Battery Street, Ste. 1150  
San Francisco, CA 94111  
(415) 543-4111  
mkelley@dwkesq.com

### Harold Freiman & Arne Sandberg

Lozano Smith  
2001 North Main St., Ste 650  
Walnut Creek, CA 94596  
(925) 953-1620  
HFreiman@lozanosmith.com  
asandberg@lozanosmith.com

### Glenn Gould

Orbach, Huff, Suarez & Henderson  
1901 Harrison Street  
Oakland, CA 94612  
(510) 999-7908  
ggould@ohshlaw.com

### Loren Soukup

Senior Associate General Counsel  
5350 Skylane Boulevard  
Santa Rosa, CA 94503  
(707) 524-2800

### P. Addison Covert

Kronich, Moskovitz, Tiedemann  
400 Capitol Mall, 27<sup>th</sup> Floor  
Sacramento, CA 95814  
(916) 321-4500  
acovert@kmtg.com

### David A. Soldani

Atkinson, Anderson, Loya, Ruud & Romo  
10 River Park Place East, Ste. 240  
Fresno, CA 93720  
(559) 225-6700  
dsoldani@aalrr.com

RGM and Associates and our clients have enjoyed a successful history in avoiding and mitigating claims in programs that the firm has set up and managed. RGM has also served public agencies and various public legal counsel as an expert analyst providing claims analysis, arbitration and litigation support, project realignment and settlement negotiations. The references listed at the left can provide examples and testimony as to how RGMs' Management Teams' approach and procedures have aided them in protecting our clients.

To date, after 30 years, we have a perfect score:

**A) Claims, Litigations, Arbitrations or Terminations filed against or by a Public Agency:**

None

**B) Pending Litigation:**

None



Laurel School Upper Campus

## TESTIMONIALS

### **San Mateo County Office of Education RGM Client Since 2011**

"I have the highest respect for their technical knowledge, honesty, and ability to complete a project on time and on budget. They are particularly skilled in estimating and offering alternatives that are more cost effective. They also have shown an exceptional ability to assist contractors in their planning and execution of construction projects."

**Denise Porterfield** – Deputy Superintendent, Fiscal and Operational Services

### **River Delta Unified School District RGM Client Since 2006**

"Many school construction programs require detailed and specialized attention to matching state funds and other state funding programs which are not immediately useable without the major focal attention of a variety of consultants. RGM has the knowledge and consulting base necessary to help a district be successful in finding and utilizing these resources."

**Dr. Alan Newell** – Superintendent, RDUSD

### **Menlo Park City School District RGM Client Since 2002**

"During the five previous years as the Superintendent of the Sebastopol Union School District, RGM had served me as the construction management firm where we completed \$20 million dollars of projects that included closing a middle school because of liquefaction, building an interim campus for operations and constructing an entirely new campus. Ralph Caputo shepherded me through this challenge while completing several other projects at the elementary schools."

**Kenneth J. Ranella** – Superintendent

### **Martinez Unified School District RGM Client Since 1995**

"They assisted us with a very complex facilities hardship application with OPSC. They met with representatives of CDE and OPSC advocating for District needs in a very compelling way. The back-up documentation was clear evidence of the quality of their work and professionalism. It was due to this support that we were able to capture the maximum amount in state funding for this challenging project."

**Rami Muth** – Superintendent

### **Contra Costa College District, Los Medanos College District RGM Client Since 2001**

"I am extremely proud of how RGM performed at LMC. Working as a partner is RGM's specialty. They are passionate about the quality, process, and outcome of their work collaborations. I always felt that I had a professional partner who was highly vested in our work and the facilities that we were creating for students and staff. Their commitment to integrity and effective communication made them a perfect fit for the working relationship that we formed."

**Peter Garcia** – President

### **Antioch Unified School District RGM Client Since 1993**

"RGM has worked for Antioch Unified School District for over 24 years and has completed the construction project management for two comprehensive high schools, one alternative education high school, two middle schools, one K-8 school, four elementary schools and one charter school. RGM has also completed over 60 portable installations. These projects total over 325 million dollars in projects."

**Tim Forrester**

### **Tracy Unified School District RGM Client Since 2004**

"RGM has been involved from the beginning on TUSD's most visible project, the complete transformation of the district's oldest school, Tracy High School. This project involved the demolition and replacement of the 1917 historic building and the renovation of the balance of the campus built in various eras from the 1950's to the 1970' s. RGM participated in guiding various committees through the process of aligning our educational goals with our community's goals to respect the history and nostalgia of the campus."

**Bonny Carter** – Director, Facilities, and Planning

## TESTIMONIALS - Continued

### **Piner-Olivet Union School District RGM Client Since 2000**

"Piner-Olivet Union School District has worked with RGM & Associates for approximately seven years. They have assisted us with many projects such as replacing flooring, replacing a driveway and other paving, large and small modernization projects, upgrading a play field and building a new school. I have always been pleased with the service the District has received, especially from Andrea Noble who has worked closely with the District on all our projects. The RGM staff is knowledgeable and professional regarding all aspects of construction. I would highly recommend RGM & Associates to any school district."

**Becky Leffew** – Director Business Services

### **Jefferson School District RGM Client Since 2010**

"RGM Associates was hired by our District six years ago after passing a \$35 million bond for school construction. The District conducted a statewide search for a construction management firm and after an extensive interview process RGM came out on top. They provided construction management services for modernization projects at three of our elementary schools. The projects included new running tracks, play fields, shade structures, bathroom upgrades, and numerous site upgrades."

**James W. Bridges** – Ed.D. Superintendent

### **Mark West Union School District RGM Client Since 2002**

"RGM takes great personal pride in their work, advocates for the owner, addresses the concerns of all players involved, and takes their work very seriously. They have developed great relationships with all of our contractors, consultants, inspectors and architects. There has never been a question about who they represent, what their role is, or where their allegiance lies. You will always know they are an integral part of your District team."

**Michael Smith** – Director Maintenance and Operations

### **John Swett Unified School District RGM Client Since 2002**

"They set the standard very high and continually exceed it – whether presenting at Board meetings or wading through a flood to clear a storm drain."

**Michael S. Roth** – Superintendent, JSUSD

### **West Sonoma County Union High School District RGM Client Since 1996**

"RGM has served a somewhat unique function with our district by taking on the accounting function for our bond and state fund money as we moved through the building process. This has been a valuable service to our district, which does not have the staff to stay on top of all the requirements, reporting guidelines, and changes coming out of Sacramento."

**David R. Wheeler** – Superintendent, WSCUHSD

### **Benicia Unified School District RGM Client Since 1995**

"In our District, RGM was confronted with several large projects that were in progress and fraught with problems. They wasted no time in getting things moving and to completion with a minimum of contractors' claims and delays."

**David J. Cappucini** – Director of Business Services, BUSD

# MARTINEZ UNIFIED SCHOOL DISTRICT

*"Together we will ensure diverse paths to support all students to be college and career ready, equipped to compete and contribute in a global society."*

## SCHOOL BOARD

John L. Fuller  
Bobbi Horack  
Kathi McLaughlin  
Deidre M. Siguenza  
Jonathan T. Wright

## DISTRICT STAFF

Superintendent  
Rami Muth

Deputy Superintendent  
Personnel Services  
C. Jackson

Assistant Superintendent  
Business  
Dime Deshler

Director  
Curriculum and  
Educational Technology  
Audrey Lee

Director  
Special Education  
Janelle Eyerl

Director  
Student Services &  
Secondary Support  
Helen Rossi

Chief Technology Officer  
Max Eissler

## SITE

### ADMINISTRATORS

Alhambra High  
Tom Doppe  
Principal

Vicente Martinez/  
Briones School  
Lori O'Connor  
Principal

Martinez  
Junior High  
Michael DeFrancesco  
Principal

John Muir  
Elementary  
Kelli Thompson  
Principal

John Swett  
Elementary  
Michael Cannon  
Principal

Las Juntas  
Elementary  
Crystal Castaneda  
Principal

Morello Park  
Elementary  
Kate Besocke  
Principal

Martinez Adult  
Education  
Kathy Farwell  
Director

June, 2016

To Whom It May Concern:

It is with great pleasure that I write this letter of recommendation on behalf of RGM and Associates. RGM is a General Contractor and Construction Management firm that offers a wide range of services. Martinez Unified is a small suburban school district of 4,200 students with very limited staffing and expertise in the area of facilities. RGM has assisted us in developing a comprehensive 25-year maintenance plan that became the springboard for a Master Facility Plan. They were an integral part of the implementation of a \$45 million general obligation bond and were selected after a very rigorous interview process. RGM had worked for the District during several previous bond programs and the District felt they were an excellent fit for our needs. RGM utilizes a hands-on approach and offers very personalized service; excellent assets for a District with limited resources.

Some of the highlights of their services to our District include the following examples:

- They have worked closely with our architects, they assisted us in completing an in-depth analysis of each of our schools that became the foundation for a future bond program.
- They assisted us with a very complex facilities hardship application with OPSC. They met with representatives of CDE and OPSC advocating for District needs in a very compelling way. The back-up documentation was clear evidence of the quality of their work and professionalism. It was due to this support that we were able to capture the maximum amount in state funding for this challenging project.
- They have delivered countless Board presentations and have played a critical role in several Board discussion meetings. They have the unique ability to make very complex projects understandable to the layman and to answer questions in a clear and articulate manner. They have also mentored our bond coordinator and helped to increase the efficiency of our staff.

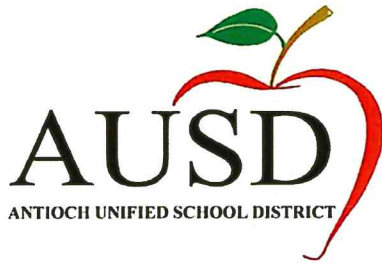
We have benefited from RGM's extensive knowledge and expertise. We have used their services for small modernization projects as well as for the construction of a new school and a new building on an existing school campus. They are very mindful of expenses and frequently offered suggestions that helped us to contain costs while maintaining high quality. I recommend them to you without reservation. Please feel free to contact me if I can be of any further assistance at [ramilmuth@gmail.com](mailto:ramilmuth@gmail.com) or (707) 694-5475.

Sincerely,

Rami Muth, Superintendent

921 Susana Street- Martinez, CA- 94553 Phone (925) 335-5800 Fax (925) 335-5961  
[www.martinez.k12.ca.us](http://www.martinez.k12.ca.us)





**Timothy Forrester**  
**Associate Superintendent**  
**Business & Operations**

August 8, 2016

Members of the Selection Committee

This letter is in support of RGM and Associates (RGM). RGM has worked for Antioch Unified School District for over 24 years and has completed the construction project management for two comprehensive high schools, one alternative education high school, two middles schools, one K-8 school, four elementary schools and one charter school. RGM has also completed over 60 portable installations. These projects total over 325 million dollars in projects.

During their time with the District, RGM has worked with various community, board and staff members. This is true testament of this company's ability to adapt and change to meet the needs of your school district.

RGM has also worked with various construction delivery methods during their time with the District and worked with multiple funding sources including, bonds funding, state financial and facilities hardship funding, Erate funding, insurance funding and capital, general and deferred maintenance funding sources.

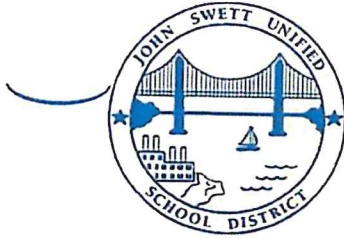
RGM is currently the construction manager for Measure B, the District bond to modernize Antioch High School. RGM is doing an outstanding job in assisting the District in scope and planning for this very critical project to our District and the community.

I cannot say enough about the support RGM has given both the District and myself over the years. I can tell you from experience, having RGM and Associates as your Construction Manager is a decision you will not regret. If insuring your project is completed on time and in budget and you are looking for assistance in managing community, board, and staff expectations for your projects, RGM and Associates is the best firm I know of to meet your needs.

If I can further assist you in your decision, please feel free to contact me.

Sincerely,

Tim Forrester



# JOHN SWETT UNIFIED SCHOOL DISTRICT

Office of the Superintendent  
Michael S. Roth  
400 Parker Avenue, Rodeo, CA 94572  
(510) 245-4300 • FAX (510) 245-4312

June 30, 2008

To Whom It May Concern:

This letter is written to serve as reference for RGM Construction Management and Associates. I know them from having worked with them in my capacity of Superintendent of the John Swett Unified School District. For six years RGM has served this district during its most ambitious construction work in over 50 years. The district has built new facilities to replace two of its five sites. These projects would not have happened without the incredible service, expertise, and commitment of RGM and Associates in the persons of Ralph Caputo, Gino Elliot, Don Chew, Brenda Rasmussen, and Andrea Noble.

RGM was initially contracted with the district after architectural plans for a new elementary school were nearly complete. They immediately conducted a constructability study and became integrally involved in all aspects of what became a successful project. It would be hard to imagine all going as well without their becoming the district's operative. Their loyalty and dedication were evident in their on site, full time, daily presence and involvement in every step of the project. Those qualities have shown their depth as RGM has worked closely to resolve difficult construction issues that arose after completion of the building. Their experience and involvement have kept the interests of the district at the forefront.

Out of the good relationship with the district, RGM offered help in preparing the district to take advantage of an opportunity to build a new central administration building. This building would be built entirely with funds from an industrial neighbor of the district.

RGM wound up building it! They did this essentially to ensure the project would go forward despite various complications - even helping negotiate a complex contract due to the unusual funding.

RGM has become a most trusted friend and consultant to the district and the relationship continues to be of great importance. The district has engaged an architect - with RGM assisting in that process - to begin major modernization, renovation, and some new construction on its comprehensive high school and alternative program campuses. RGM's expertise and hard work has obtained an unexpected \$7 million in Emergency Repair Program funds to augment these projects. RGM will serve as construction managers throughout.

A public school superintendent has opportunities and needs to work with a variety of professionals representing various walks of life. Expertise, trustworthiness and dedication along with positivity, responsiveness, and true concern for the interests of the client are what this client has sought. No professional partner has been more distinguished in providing such service with high quality than RGM. They set the standard very high and continually exceed it - whether presenting at Board meetings or wading through a flood to clear a storm drain.

I recommend as highly as I can RGM Construction Management for any work to which they seek to involve themselves. Hiring RGM was a great decision. Working with RGM has produced great successes and has been a great pleasure.

Please contact me if further information is needed. Sincerely,

Michael S. Roth Superintendent

## GOVERNING BOARD

Brian Colombo

Norma Clerici

William Concannon

Benita Shaw-Malone

Holly Myers



# PITTSBURG UNIFIED SCHOOL DISTRICT

2000 RAILROAD AVENUE · PITTSBURG · CALIFORNIA 94565

PHONE: (925) 473-4231

FAX: (925) 473-4274

November 27, 2007

To whom it may concern:

RE: RGM and Associates

As I reflect back on my career as a superintendent, there may have been issues which I would have chosen to do differently. However, I would **never** alter the hiring of RGM and Associates as the district's construction manager firm.

After a lengthy statewide search including paper screening and comprehensive presentation by the top candidates, RGM and Associates was viewed to be "head and shoulders" above its competitors. This initial perception was validated immediately. Their assistance in architect selection; review of the drawing to avoid potential change orders; participation at meeting for compliance, funding, property acquisition and design; and supervision of the project was and continues to be outstanding. Most importantly, I have no doubt they will continue to insure the present projects are completed on time and under cost projections.

The team assigned to the district is very professional, astute, extremely knowledgeable, and exceptionally accessible. I could always get my questions and concerns answered immediately and am confident about the accuracy of the answer.

Without any reservation, RGM and Associates would serve your all needs as a construction and consultant firm. Please don't hesitate to contact me (707-446-1550) if you have any questions.

Sincerely,

Reed McLaughlin  
Superintendent (Retired)



District Office  
181 Encinal Avenue  
Atherton, California 94027  
650-321-7140  
FAX: 650-321-7184  
www.mpcsd.org

Board of Education  
Mark Box  
Maria Hilton  
Joan Lambert  
Laura Rich  
Terry Thygesen

*A Community of educators, scholars, parents and staff working together  
to inspire, serve, challenge and enrich all students*

Kenneth Ranella,  
Superintendent

June 27, 2011

Jo Sauer Mitchell,  
Asst. Supt./Curriculum &  
Instruction

To Whom It May Concern:

Diane White,  
Chief Business Officer

Nine years ago when I assumed the position of Superintendent of the Menlo Park City School District, one of my first contacts was with Ralph Caputo, the CEO of RGM Associates. At that time I needed Ralph Caputo and RGM to assist me in concluding a very dysfunctional construction project and the closure of two others.

Olivia Mandlik,  
Dir. Of Student Services

I called with a great sense of confidence in RGM. During the five previous years as the Superintendent of the Sebastopol Union School District, RGM had served me as the construction management firm where we completed \$20 million dollars of projects that included closing a middle school because of liquefaction, building an interim campus for operations and constructing an entirely new campus. Ralph Caputo shepherded me through this challenge while completing several other projects at the elementary schools.

Jim Bowlby  
Dir. Of Technology

Kathryn Christopherson,  
Human Resources

In the Menlo City School District, RGM had an even greater impact. Consider:

- Ralph Caputo facilitated the selection of a District Architect.
- Ralph and his firm assisted with defining the scope and revenue needed to pass a \$91.1 million bond.
- Ralph Caputo participated as a valued partner in the design of projects for all four campuses.
- RGM delivered admirably, managing the \$110 million dollars of projects under construction simultaneously at the schools resulting in the projects concluding on time and within the budget.

Ahmad Sheikholeslami  
Director, Facility  
Planning & Construction

Dennis Hatfield  
Supervisor Maintenance,  
Transportation,  
Operations

When a District contracts with RGM, it can expect great attention to its needs and aspirations. It can anticipate quality staff deployed to the District. It will perceive itself as RGM's only client because of the firm's responsiveness and commitment. Most importantly, it will succeed in its facility development goals regardless of the size of its projects or the scope of the work.

I received a substantial number of accolades as Superintendent for the facility projects that were accomplished during my tenures in both Sebastopol Union and Menlo Park City School Districts. Bonds were passed, State funding was accessed, construction was accomplished, and facilities were opened on time and within budget. Each time those acknowledgements were expressed, I referenced the work of Ralph Caputo and RGM for their contributions to the

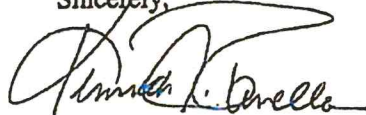
success of the initiatives. RGM has been integral to the process, leading the District through the challenges of facility planning and construction, and providing the necessary expertise that a district normally does not possess within its current personnel.

Additionally, Ralph Caputo understands the politics of facility development within a public school district. He builds confidence in his reports to the Board, facilitates planning meetings with diverse stakeholders that conclude in consensus, and is willing and able to address the public when community members and neighbors believe that the construction project may have a negative impact on them.

Ralph Caputo and his RGM team work exceedingly well with the District staff, be it the Business Office, the principals of schools where construction is underway, or other staff assigned to facility development and maintenance. Within the process of planning and/or construction, Ralph and his team appreciate the cultures of the District and the Community and in a short time are perceived as an indispensable member of the District.

During my 20 years as a Superintendent, who has engaged with many different staffs, contractors and consultants, I can think of no better a partner than RGM. Facility development is challenging and difficult in all public school districts. As the Superintendent, it is reassuring to know that RGM will always deliver.

Sincerely,

A handwritten signature in blue ink, appearing to read "Kenneth J. Ranella". The signature is stylized with a large, sweeping initial "K" and "R".

Kenneth J. Ranella  
Superintendent



September 25, 2013

Re: Recommendation for RGM and Associates

To Whom It May Concern:

It is with a great deal of pleasure that I write this letter of recommendation for RGM & Associates. RGM & Associates has been associated with the Tracy Unified School District since 2004, most recently as the construction and project management firm in charge of our Measure E and Measure S projects. They have been involved in the planning and construction of over \$105 million in projects with our district.

RGM and Associates professional expertise in general construction, architecture, engineering and construction management have been instrumental to the success that the district has had with our construction projects. TUSD has limited facilities staff, therefore RGM and Associates participates in the planning aspects of our projects, including infrastructure and site construction, budgeting, phasing, as well as making recommendations to our architects on construction and modernization planning.

***"The future belongs  
to the educated"***

**Dr. James C. Franco**  
*Superintendent*  
209) 830-3201  
209) 830-3204 Fax

**Dr. Casey J. Goodall**  
*Associate Superintendent  
of Business Services*  
209) 830-3230  
209) 830-3234 Fax

**Dr. Sheila Harrison**  
*Assistant Superintendent  
of Educational Services:*  
209) 830-3202  
209) 830-3209 Fax  
*Human Resources:*  
209) 830-3260  
209) 830-3264 Fax

Understanding that it takes not only highly qualified personnel to maintain good relationships but also a genuine interest in the district as a whole, RGM has provided exceptional staff that stay involved and accessible to provide advice to our maintenance and operations staff as well others in the district. RGM & Associates represents TUSD at all on-site job meetings. They keep everyone updated and informed; and when faced with a project dilemma, they provide advice and recommendations to management staff so that issues can be quickly resolved.

RGM has been involved from the beginning on TUSD's most visible project, the complete transformation of the district's oldest school, Tracy High School. This project involved the demolition and replacement of the 1917 historic building and the renovation of the balance of the campus built in various eras from the 1950's to the 1970's. RGM participated in guiding various committees through the process of aligning our educational goals with our community's goals to respect the history and nostalgia of the campus.

To deliver projects with such high expectations requires a great deal of problem solving, which I believe to be one of RGM & Associates greatest strengths in delivering our projects. They work seamlessly with all stakeholders, not only guiding us through the construction process but also through closeout process. RGM monitors the construction with a keen eye toward workmanship and quality control on behalf of the school district while exhibiting the appropriate skill and temperament in working with the architect and contractor to effectively resolve issues with practical and fair solutions.

I would highly recommend RGM & Associates to others whom may have similar project needs.

Sincerely,

  
Bonny Carter,

Director, Facilities and Planning

1875 W. Lowell Avenue  
Tracy, CA 95376  
www.tracy.k12.ca.us

February 17, 2015



Dear Members of a Selection Committee:

This letter is in support of RGM Associates, to be attached to their copy of the Request for Qualifications Statement, to provide construction project management services for your university. In my twenty years in education I've had the pleasure of working with a number of great companies and RGM Associates would rank near the top. In my five years working with RGM I have found all of their employees knowledgeable, professional, and available to answer any questions. While many companies that provide construction management services are only protecting their own interests, RGM is always looking out for their clients and trying to find ways to improve the project.

RGM Associates was hired by our District six years ago after passing a \$35 million bond for school construction. The District conducted a statewide search for a construction management firm and after an extensive interview process RGM came out on top. They provided construction management services for modernization projects at three of our elementary schools. The projects included new running tracks, play fields, shade structures, bathroom upgrades, and numerous site upgrades.

RGM is currently providing construction management on two large-scale projects. In the second phase of our bond project, they are overseeing the construction of a \$20 million modernization project at our middle school. This project has been quite complex and challenging due to the construction taking place outside the city limits of Tracy and requires vast site improvements. These improvements have included close to \$7 million in new sewer, water, and road improvements. Also, they are building over 40,000 square feet of classroom and office space and converting a gymnasium into a cafeteria. Finally, RGM is managing the construction of a new gymnasium at one of our elementary schools. With all large-scale construction projects there are going to be unforeseen conditions, but the attention to detail by RGM in the review of pre-construction documents has minimized these conditions. In addition, when problems arise, RGM is quick to respond with multiple viable solutions to help the owner make decisions how to proceed.

Without reservation I would recommend RGM Associates for any construction management or consulting services. If you have any questions please don't hesitate to call me at (209)836-3388.

Sincerely,

A handwritten signature in blue ink that reads 'James W. Bridges'. The signature is fluid and cursive.

James W. Bridges, Ed.D.  
Superintendent

## PROFESSIONAL EDUCATION

RGM currently has a staff of 42 full-time personnel, including 23 project managers, and has maintained continual, controlled growth, bringing in new personnel with diverse educational and job-related experience in architecture, engineering, construction, business and construction management.

Our personnel and primary team members are Senior Project Managers and Project Managers with demonstrated experience and expertise in serving K-12 districts with programs similar to that of Mt. Diablo Unified School District. Our team members make it a priority to stay current on all DSA, CDE, and OPSC programs and requirements. We are well versed in both Public Contract Code and the Uniform Public Cost

Accounting Act. We stay current on construction delivery methods, including all legal requirements and recommended practices. RGM and Associates supports a "green commitment" and are proud members of the U.S. Green Building Council (USGBC) and the Collaborative for High Performance Schools (CHPS).

Our company supports all its staff by maintaining its memberships in numerous industry organizations: the Coalition for Adequate School Housing (C.A.S.H.), the California Association of School Business Officials (CASBO), the Association of California Construction Managers (ACCM), the Associated General Contractors (AGC) and others that provide workshops and other venues and opportunities for advanced learning and continued education.



Music Building, John Swett High School, John Swett Unified School District



## DOCUMENT CONTROLS - CAPABILITES

**RGM and Associates'** expertise at utilizing strategies such as phasing, sequencing and other contract implementation methods establishes a strong foundation that aids the District in developing logical contract packages, minimizing disruption at the site and optimizing the District's construction budget and schedule. Following are details specific to the Firm's technical capabilities for scheduling, budgeting, cost estimating and document control:

### Scheduling

RGM reviews the project schedule to ensure it is logical, activity durations and relationships are realistic, and that it meets the contract requirements for project milestones. But because a successful project must adhere to a clear work plan and schedule, RGM regularly reviews progress against the planned schedule and identifies potential delays. If a delay is anticipated, RGM works with the contractor to develop solutions to regain the schedule. Furthermore, the RGM team evaluates the contractor's work plan and schedules to confirm it coordinates and interfaces with other project activities, such as utility connections, off-site improvements and furnishings, or owner-furnished equipment, technology and move-in requirements.

### Budgeting

RGM's project budgets follow the OPSC expenditure reporting format which provides greater ease in tracking project expenditures, from estimated to actual, and reveals where items have varied either over or under the estimate. This allows the PM to clearly show the District where it may request "added value" items and where it might be wise to cut back to ensure conformance with the prescribed budget. RGM maintains Master Program and individual project budgets built to follow seamlessly with the OPSC expenditure reporting system.

### Cost Estimating

In addition to conceptual estimating during preliminary and progress design, RGM provides a detailed estimate at the 90% completion stage which further refines the project budget and helps determine if the bid form should contain allowances and alternates. If the completed drawings are still trending over the proposed construction budget, RGM identifies components that could be modified or eliminated, (value engineering), while still preserving the integrity of the project. RGM's goal in plan review, estimating and value engineering is to develop a set of documents for a project that offer a realistic schedule and budget. It is easier and more efficient to proactively correct the bid documents than to

later wrestle with change orders, delays and cost overruns.

### Cost Tracking

RGM's cost tracking begins in the planning process, where the Firm identifies potential cost savings and design features that may exceed the budget. By identifying potential problem areas early, RGM facilitates informed decisions that help ensure a successful project. As previously stated, it is crucial to any program or project to maintain efficient cash flow, consequently RGM provides Cash Flow Projections tied to the master schedule which helps ensure that the District can construct within its budget and anticipate phased revenue sources. RGM's forms and procedures for managing payment requests are designed to provide the information that the District's business office needs to process payment applications in a timely manner, and provides assurances that the pay requests are reasonable, legal, and undisputed.

### Document Control

RGM will establish document filing and retrieval systems in conformance with the District's standards, ensuring the information management system provides the project team rapid access to key project documents. RGM will prepare a list of anticipated submittals and confirm with the contractors when the documents will be submitted. Submittal logs will track documents from initial receipt to final approval, and submittal status will be a topic of each weekly meeting so that the review process does not negatively impact the schedule. RGM receives and monitors Requests for Information (RFIs) using a detailed RFI tracking log, which will also be an agenda item at each weekly meeting. Any RFI that has the potential for a cost increase is clearly identified and tracked.

### Quality Control Systems

RGM's team also understands the relationship of sub-consultants to the Architectural and Engineering Team and to the Inspector of Record, and works collaboratively with all consultants who are also charged with quality control, including Manufacturers' Representatives, to ensure that materials and equipment are properly specified, installed, and fully warranted. RGM's many years' experience ensures they understand the materials, systems, finishes, and products that will be used and allows them to plan and monitor appropriate inspections and testing so that the project moves forward on time and on budget, while ensuring quality to the District.



Oak Knoll Middle School • Menlo Park City School District

## EXPERIENCE IN FACILITATION OF THE CONSTRUCTION PROCESS

(As previously presented in the Executive Summary section)

RGM and Associates experience and expertise includes effectively working and communicating with a variety of stakeholders such as, District and site administration and staff, State and Local regulatory agencies, consultants, contractors and vendors, community groups, Citizen Bond Oversight Committees and Governing Boards. RGM understands the types of concerns that are typically posed by staff and community groups and can guide the District in effectively addressing them. RGM is skilled in helping Districts identify the key decision points and in helping the entire school community throughout the planning and construction processes.

Our combined team considers regular communication and coordination meetings with regulatory agencies, advisory committees and decision makers essential to a successful project. Throughout the final design phase and construction process we will support the District by facilitating communication and coordinating meetings with the District, project site administration and staff, Facilities, Maintenance and Operations, and other user groups. Our philosophy advocates transparency, honesty, integrity, responsiveness and helpfulness. These characteristics of the firm allow our team to respond in fluid and dynamic ways to the unique challenges of the District.

We routinely attend Board meetings and presents project status reports, budget updates, bid award and change order recommendations, etc. In some Districts, RGM works in the background providing support to the facilities or business staff for any public administrative reporting or accounting presentations. RGM attempts to work pro-actively with all of the parties associated with a project. It's fundamental role is to facilitate the design and construction processes. Detailed planning and communication efforts are, therefore, essential.

Our program management services emphasize the facilitation of our clients' decision-making processes and the relentless execution of their vision. Whether selecting and managing architects and builders, or maintaining control over quality, cost, and schedule, our role is to ensure that our client's performance criteria are met in every aspect.



Black Diamond Middle School, Antioch USD



Laurel Elementary School, Menlo Park City SD

## **COST CONTROL** (As represented in the Executive Summary)

Constructability reviews are ideally designed to look at the project from a contractor's perspective and determine if the drawings and specifications are in sufficient order from which to properly estimate and build. We believe our construction background, combined with members of our staff who are experienced in design, estimating or DSA/IOR, provide us with a unique edge over other firms in conducting comprehensive constructability and coordination reviews. We make a point of having several people with different perspectives (i.e., construction, estimating, engineering, DSA/IOR, architectural, or specialty trades) review the drawings. Our fees for this service not only run less than OPSC guidelines, but we fold in coordination, regulatory (Title 24) and often value engineering reviews in conjunction with the constructability reviews.

The budget/cost estimates provided by RGM are performed by competent and experienced staff, professional estimators, project managers and superintendents who have made their living bidding and running projects as contractors prior to becoming owner's representatives. Therefore, the final budgets and value engineering we provide are not based merely on square foot or book analysis. As needed, we will solicit other entities (electrical, plumbing, mechanical or specialty contractors) to assist with constructability reviews and cost estimates to ensure reliability.

Our constructability reviews often include review and modifications to the front-end documents and even technical specifications when necessary. We try to evaluate boilerplate language and make the technical specifications as job-specific as possible. This also applies to the front-end documents. In conjunction with the architect and input from legal counsel, we have re-worked the front-end documents for Benicia and Antioch Unified School Districts, and the City of Brentwood. We now include detailed project summaries and narratives regarding coordination requirements. The indemnity provisions, insurance requirements, claims mitigation language, change order guidelines and payment request procedures implemented are all customized. In an effort to circumvent the incentive for contractors to bid and pursue change orders, we explicitly define the type of costs, overhead and profit margins allowed. We have compiled customized contract agreement forms, general, supplementary and special condition sections and other provisions specifically suited to protect the owner, and do not rely solely on AIA or other standard "boilerplate" forms.

The following types of review services are offered as part of comprehensive Program / Project Management.

### **Constructability Review**

A Constructability Review is a review of the plans and specifications from a Contractor's perspective and is intended to determine if the documents are sufficient to compile a bid and adequate enough for the Contractor to determine how to construct the project. The reviewer will also check if the materials and methods specified are readily available and proper for the intended purpose, noting any long lead items which may affect sequencing and project continuity. Accordingly, a Constructability Review will help reduce potential problems with substitution requests, numerous Requests for Information (RFI's) and resulting delays and Change Orders. A Constructability Review may also involve major components of the other reviews defined below.

### **Coordination Review**

A Coordination Review, sometimes referred to as an Interdisciplinary Review, is typically intended to cross reference the architectural drawings with the technical specifications and the various engineering disciplines (i.e., structural, mechanical, plumbing and electrical drawings). The purpose is to alleviate internal inconsistencies in the documents by ensuring proper coordination between the various disciplines.

### **Code Compliance Review**

A Code Compliance Review consists of an examination of the documents in relation to Title 24, DSA criteria and other applicable Building Codes. This will include review for life safety, fire ADA access, structural, plumbing, mechanical and electrical code compliance. Our review staff includes DSA-approved working inspectors who know local DSA field representatives' particular criteria and special issue items.

### **Value Engineering**

Value Engineering is a review intended to offer alternative materials and methods which will essentially serve the same aesthetic and structural purpose but be more readily available and less expensive than that which is specified. A proper review will also consider life cycle cost factors and maintenance and operation expenses on machinery and appliances. An extension of the review often involves a comprehensive search for cost-saving factors which may somewhat compromise the original design but is intended to help bring projects back into budget.

**Both modernization and new construction projects** require thoughtful planning, stakeholder engagement, procurement, design management, coordination, regulatory approvals, construction management and oversight, and closeout. However, modernization projects typically are more complex and challenging from a logistical perspective requiring more up-front planning and coordination for a better understanding of the buildings existing conditions; site utilities, building conditions assessment, as-built drawing's, focused destructive testing, exploratory excavation, etc., all of which go a long way to better understanding conditions that will assist in the planning, design, and construction activities.

Other factors that differentiate a modernization project from new construction are safety, interim housing, construction sequencing, security, construction access,

and infrastructure improvements as these sites are occupied so impacts to school operations have to be minimized, requiring extensive upfront planning, and communication.

The Mt. Diablo Unified School District Program will involve major work on occupied campuses, including modernization and additions. The RGM team has a proven history of developing programs to rebuild or replace operational school facilities. The planning and phasing required to maintain a functional and safe school during reconstruction is the most important factor in maintaining a successful program.

The RGM team has completed numerous complicated reconstruction projects on existing occupied sites. Example of campus reconstruction or replacements include:

- Martinez Jr. High School, Martinez Unified School District
- Tracy High School, Tracy Unified School District
- Pittsburg High School, Pittsburg Unified School District
- Hillview Middle School, Menlo Park City School District
- Laurel, Oak Knoll and Encinal Elementary Schools, Menlo Park City School District
- Brookhaven Middle School, Sebastopol Union School District
- John Swett High School, John Swett Unified School District
- Antioch High School, Antioch Unified School District
- Benicia Middle and High School, Benicia Unified School Districts
- Floyd Marchus and Lucille Mauzy Schools, Contra Costa County Office of ED
- Various Schools, Redwood City School District



Alhambra High School, Martinez Unified School District

## Construction Schedules

RGM and Associates understands that effective schedule management and delay avoidance begins with proper planning, and prudent master program and project scheduling. Schedules must endeavor to meet the requirements of the District and its constituents yet be reasonable and achievable. RGM has a proven record at planning schedules and meeting them. Over the course of many years RGM has worked with several districts and public entities to improve design and construction schedules and avoid costly delays without significant impact to the District. RGM has, for example, worked with districts and their design teams to overlap elements of schematic, design development and construction document phases concurrently when the design and approvals need to be condensed. RGM has extensive experience scheduling projects similar in scope and size to those proposed in the District's Program.

In collaboration with the District and design team, RGM will prepare a master program schedule. It will include milestones for completion of the various phases of design, reviews and approvals. Required regulatory

approvals including DSA, CDE, and other agencies such as DTSC, CEQA processing will be identified and incorporated into the program schedule. As necessary, the schedule will be updated to reflect actual durations, completion dates, and new requirements. Potential interim housing requirements will be identified so that planning and implementation of necessary interim housing can be scheduled and completed ahead of any construction. RGM will work closely with District staff to coordinate delivery and provide move in coordination where needed. Target construction start and completion dates will be identified for each phase of a project and viable construction duration solidified in the contract documents.

RGM knows that schedule and contract management involve more than preparing a detailed schedule. The ability to complete projects on time begins long before construction gets underway. Through direct involvement with the District and Design Team during programming and design, RGM has helped establish practical, feasible – and in certain situations, expedited - schedules which were accomplished by giving attention to:

- A thorough review of documents
- Conceptual and detailed cost estimating
- Detection and mitigation of potential cost overruns
- Assisting with user group and agency approvals
- Identification of the most appropriate construction delivery method
- Identification and procurement of long lead items
- Evaluating the need for additional shifts, crew sizes, select shift differential and/or overtime where prudent, and incorporating such needs into the contract documents
- Separate site development packages and phasing options.

For example, the John Swett Unified School District wanted their High School athletic field to be ready to host the first home football game. This imposed a Milestone that was not compatible with the Division of the State Architect's timeline for review and approval of the project, and also imposed a very tight timeline for construction. RGM broke the project out into two phases, with a multiple-prime delivery method: construction that did not require Division of the State Architect (DSA) review and approval (the synthetic turf field) and construction that required DSA review and approval (bleachers, field lighting, scoreboards and other structural components). RGM proceeded with the field improvements while the structural components were being reviewed by the DSA. RGM also procured temporary bleachers and lights so that the first home game could be played on the home field, even though some of the permanent structures were delayed by the DSA approval process.

**John Swett Unified School District**

400 Parker Avenue  
Rodeo, CA 94572

**Bond Programs: \$120M**

**School Sites:**

- John Swett High School
- Carquinez Middle School
- Willow Alternative School
- Rodeo Hills Elementary School

**Client Contacts**

Robert Stockberger,  
Superintendent  
(510) 879-2962  
rstockberger@jsusd.k12.ca.us

Paul Disario (Previous CBO)  
(559) 273-9549  
Derek Pinto, CBO  
(510) 245-4300

**Project Architect:**

Gelfand-Partners  
Tobin Kendrick  
(415) 346-040  
tobin@gelfand-partners.com



Oakland Technical High School

RGM and Associates has provided Construction, Program and Management services for the John Swett Unified School District since 2002. RGM has assisted the District with facility assessments, consultant selection, master planning, program development, budgeting, cash flow management and scheduling through two bond measures. RGM has facilitated the District's interactions with the OPSC, DSA, DTSC, CDE and other agencies while providing expenditure reporting and close-out services.

RGM has managed the abandonment of the District's elementary school site and its replacement with a new \$18 Mil elementary school campus. RGM acted as the General Contractor for the District's new, two-story modular office building. In 2008, the JSUSD embarked on a \$ 40 Million multi phased construction program to upgrade the John Swett High School and Willow Alternative High School campuses. RGM provided the program planning and management, helped the district obtain over \$6 Million in Emergency Repair Grants and assisted in the application process for State SFP funding to supplemented local bond funds.

RGM managed the replacement of the Willow campus classroom buildings, transformed the John Swett High School and athletic stadium facilities, including the construction of two new classroom buildings, to older campus structures and provide new instructional spaces. The multi phased program also involved extensive abatement and hazmat site remediation under DTSC oversight and significant structural and modernization upgrades of the historic buildings which makes the 90-year old campus fully accessible. We are now assisting the District planning its current Bond Program.



Antioch High School

RGM and Associates has provided comprehensive Program and Construction Management services for the Antioch Unified School District since 1993. We have assisted the District with facility assessments, cost estimates and general bond planning including the successful \$61.6M Measure C Bond campaign in 2008 and the recent \$56.5M Measure B Bond Campaign in 2012. RGM has facilitated architect and engineering selection processes and assisted the District Team with master planning, program development, budgeting and phasing coordination. RGM has also assisted with obtaining planning approvals through the OPSC, CDE, DSA and local agencies and has assisted the District with substantial progress reporting, OPSC and DSA Closeout documentation.

**Antioch Unified School District**

510 G Street, Antioch, CA 94509

**Bond Program: \$330M**

**School Sites**

- New Elementary Schools 4
- New Middle Schools 2
- New Comprehensive High Schools 1
- Magnet High Schools 1
- Alternative / Adult High Schools 1
- New Charter Schools 1
- Modernization 16

**Client Contacts**

Timothy Forrester (*Retired*)  
Associate Superintendent  
Business and Operations  
(925) 382-8826  
timothyforrester@comcast.net

Stephanie Anello, Superintendent  
(925) 779-7500

**Project Architect**

HKIT Architects  
Dara Youngdale  
(510) 625-9800  
DYoungdale@HKIT.com

**JOHN SWETT UNIFIED SCHOOL DISTRICT**  
 400 Parker Avenue  
 Rodeo, CA 94572

**Robert Stockberger, Superintendent**  
 rstockberger@jsusd.k12.ca.us  
 (510) 245-4300  
**Michael Roth, Former Superintendent**  
 (510) 597-1782

PROJECT NAME / LOCATION	PROJECT TYPE	PROJECT COMPLETED	VALUE	CO's	LEAD STAFF	ARCHITECT	CONTRACTOR	IOR
JSHS Growth 1 - Auditorium & Academic Wing	Modifications & Additions to Existing Buildings	2013	\$7.0M	\$422K	Andrea Noble Ridge Greene	Tobin Kendrick Gelfand-Partners (415) 346-4040 Tobin@gelfand-partners.com	C. Overea & Co. 200 Parr Blvd. Richmond, Ca 948801 (510) 234-0926	Todd Stanton (925) 766-9088 siservices1@hotmail.com
Willow Continuation High School	Site Preparation & Installation of 5 Portables	2012	\$458K	\$28K	Andrea Noble Ridge Greene	Larry Schadt Gelfand-Partners (415) 346-4040 Larry@gelfand-partners.com	Bruce Carone Grading & Paving P.O. Box 129 Crockett, Ca 94525 (510) 787-4070	Todd Stanton (925) 766-9088 siservices1@hotmail.com
JSHS Windows Replacement	Window Replacement	2012	\$1.0M	\$13K	Andrea Noble Ridge Greene	Tobin Kendrick Gelfand-Partners (415) 346-4040 Tobin@gelfand-partners.com	BEST Contracting Services 4301 Bellencourt Way Union City, CA 94587 (510) 886-7240	Todd Stanton (925) 766-9088 siservices1@hotmail.com
JSHS Parapet Bracing	New Steel Brace Frames	2011	\$688K	\$272K	Andrea Noble Ridge Greene	Chris Duncan Gelfand-Partners (415) 346-4040 Chris@gelfand-partners.com	Giampolini/Courtney 1445 Bush Street San Francisco, CA 94109 (415) 345-1218	Todd Stanton (925) 766-9088 siservices1@hotmail.com
JSHS Steel & Brick Masonry Repairs	Steel & Brick Repairs	2011	\$1.2M	\$49K	Andrea Noble Ridge Greene	Chris Duncan Gelfand-Partners (415) 346-4040 Chris@gelfand-partners.com	Giampolini/Courtney 1445 Bush Street San Francisco, CA 94109 (415) 345-1218	Todd Stanton (925) 766-9088 siservices1@hotmail.com

**ANTIOCH UNIFIED SCHOOL DISTRICT**  
 510 "G" STREET  
 ANTIOCH, CA 94509

**Timothy Forrester, Associate Supt.**  
 Business & Operations (Retired)  
 timothyforrester@comcast.net  
 (925) 382-8826

PROJECT NAME / LOCATION	PROJECT TYPE	PROJECT COMPLETED	VALUE	CO's	LEAD STAFF	ARCHITECT	CONTRACTOR	IOR
Antioch High School New Stadium, Track and Field	New Construction (Lease-Leaseback)	2015	\$8.1M	\$296K	Marlin Jones Richard Dunlap	HKIT Architects (510) 625-9800 Dara Youngdale  538 Ninth Street, Suite 240 Oakland, CA 94607	Robert A. Bothman, Inc. Brian Bothman 2690 Scott Boulevard Santa Clara, CA 95050 (408) 279-2277	Neil Brodhead casp.inc@gmail.com 925-584-1930
Antioch High School New Admin/Library	New Construction (Lease-Leaseback)	2015	\$9M	\$0	Marlin Jones Richard Dunlap		XL Construction Steve Winslow 851 Buckeye Court Milpitas, CA 95035 (408) 240-6306	Greg Birtchet tl24insp@yahoo.com 925-234-1500
Antioch High School Modernization of Three Classroom Wings	Modernization (Lease-Leaseback)	2015	\$2.8M	\$0	Marlin Jones Richard Dunlap		XL Construction Steve Winslow 851 Buckeye Court Milpitas, CA 95035 (408) 240-6306	Neil Brodhead casp.inc@gmail.com 925-584-1930
Installation of Solar at Various Sites	New Construction (Design-Build)	2015	\$24.8M	\$180K	Marlin Jones	ATI Architects (925) 648-8800 Mark Bellow 3860 Blackhawk Road Danville, CA 94506	Sunpower Corporation (925) 818-8072 Pat Dalton 1414 Harbor Way South Richmond, CA 94804	Greg Birtchet tl24insp@yahoo.com 925-234-1500
Modernization Projects Sutter Elementary Turner Elementary Prospects High School Belshaw Elementary	Modernization (Lease-Leaseback)	2011	\$3.2M	\$160K	Anthony Continente David Bennett		XL Construction Steve Winslow 851 Buckeye Court Milpitas, CA 95035 (408) 240-6306	Joe Titone jntitone@huges.net 925-260-4762  David Hitchinson davidhitchinson@comcast.net 415-899-0083
2010 Modernization Projects Belshaw Elementary School Kimball Elementary School John Muir Elementary School Antioch Middle School Park Middle School Antioch High School	Modernization	2010 2012	\$4.1M	\$880K	Anthony Continente Marlin Jones Steve Gligorea Ramon Parocua	ATI Architects (925) 648-8800  Kendall Young Architects (415) 552-1118  Quattorochi Kwok Architects (707) 576-0829	Various	Joe Titone jntitone@huges.net 925-260-4762  Neil Brodhead neilb@frontiernet.net 925-584-1930
Measure C Bond - Phase 2 Antioch Middle School	Modernization (Lease-Leaseback)	2012	\$4.7M	\$206K	Anthony Continente Steve Gligorea	ATI Architects Paul DiDonato / Rup Chand 3860 Blackhawk Road Danville, CA 94506 (925) 648-8800	XL Construction Steve Winslow 851 Buckeye Court Milpitas, CA 95035 (408) 240-6306	Joe Titone jntitone@huges.net 925-260-4762





Martinez Junior High School

RGM and Associates has provided Program and Construction Management services for the Martinez Unified School District since 1996. During the nearly twenty (23) year partnership, projects have consisted of new construction and modernization work, modular classroom installation, environmental abatement, site and building demolition, kitchen additions, maintenance and repair projects. RGM is currently consulting the District's \$45 million Measure K Bond Program which includes "21<sup>st</sup> century technology" upgrades, energy saving improvements and maximizing State matching funds and planning the District's John Muir Elementary School Replacement as part of the recent \$120.M measure R.

**Martinez Unified School District**

921 Susana Street  
Martinez, CA 94553

**Total Bonds: \$190M**

**School Sites:**

- Elementary Schools: 4
- Middle Schools: 1
- High Schools: 1
- Alternative High Schools: 1

**Client Contacts**

Helen Rossi, Assist. Superintendent  
(925) 335-5925

Joe Schoenstein , Bond Coordinator  
[jschoenstein@martinez.k12.ca.us](mailto:jschoenstein@martinez.k12.ca.us)  
(925) 483-0203

**Project Architect:**

Quattrocchi Kwok Architects  
636 5th Street  
Santa Rosa CA 95404  
Mark Quattrocchi  
(707)576-0829  
[mark@qka.com](mailto:mark@qka.com)

**Pittsburg Unified School District**

351 School Street  
Pittsburg, CA 94565

**Total Project Costs: \$193.5M**

**School Sites:**

- Elementary Schools: 6
- Middle Schools: 3
- High Schools: 1

**Client Contacts**

Mark Bonnett, Previously Assistant Superintendent  
(707) 853-6107

Paul Disario (Previous CBO)  
(559) 273-9549

**Project Architect:**

California Design West  
Mitch McAllister  
(916) 446-2466  
[mmcallister@ca-dw.com](mailto:mmcallister@ca-dw.com)



Marina Vista Elementary School

RGM and Associates provided the Pittsburg Unified School District with preliminary planning, program development and construction management beginning in 1999. RGM prepared the facility assessments and bond planning for two of the District's local bond measures (\$40.5M for Measure E in 2004 and \$85M for Measure J in 2006), then assisted the District with entering the State Building Program to augment local bond proceeds with state matching funds where eligible. For Measure E, RGM assisted in obtaining an additional \$32M in Growth, Joint-use, Modernization, and Facility Hardship to develop a total bond program of \$72.5M. For Measure J, RGM assisted in obtaining approval for \$30M in Growth, Career Technology, Over-crowded Relief Grants, and Modernization funding, and prepared an additional \$6M in Modernization and Growth funding for a total bond program of \$121M.

**MARTINEZ UNIFIED SCHOOL DISTRICT**  
 921 Susana Street  
 Martinez, CA 94553

Helen Rossi, Assistant Superintendent Admin Services  
 hrossi@martinezusd.net  
 925-335-5925  
 Joe Schoenstein, Bond Coordinator  
 jschoenstein@martinez.k12.ca.us  
 (925) 335-5931

PROJECT NAME / LOCATION	PROJECT TYPE	PROJECT COMPLETED	VALUE	CO's	STAFF	ARCHITECT	CONTRACTOR	IOR
Alhambra High School Building K (11,520 SF)	New Construction (Lease-Leaseback)	2017	\$6.2M		Jon Novero	Hibser Yamauchi Architects 300 27th Street Oakland, CA 94612 510-446-2222 Marcus Hibser mhibser@hy-arch.com	JL Modular, Inc. 70 Stony Point Rd., Ste. D Santa Rosa, CA 95401 Jeff Luchetti 707.527.5788 jeffl@jlcbuild.com	Greg Birtchet (925) 234-1500 gbirtchet@att.net
Alhambra High School F, H & B Classroom Upgrade (24 Classrooms)	Modernization	TBA	\$1.7M		Jon Novero	NA	Various	Greg Birtchet (925) 234-1500 gbirtchet@att.net
Alhambra High School D & H Modernization (6 Classrooms)	Modernization	2019	\$2.4M		Jon Novero	Hibser Yamauchi Architects 300 27th Street Oakland, CA 94612 510-446-2222 Marcus Hibser mhibser@hy-arch.com	Simile Construction 4725 Enterprise Way, #1 Modesto, CA 95356 Mark Saran 209-545-6112 jmark@similebuilt.com	Greg Birtchet (925) 234-1500 gbirtchet@att.net
John Muir Replacement (49,000 SF)	Design/Build	TBA	30M		Jon Novero	Hibser Yamauchi Architects 300 27th Street Oakland, CA 94612 510-446-2222 Marcus Hibser mhibser@hy-arch.com	Lathrop Construction 4001 Park Road Benicia, CA 94510 Rick Martellaro 707-746-8000 rick.martellaro@lathropconstruction.com	Greg Birtchet (925) 234-1500 gbirtchet@att.net
Vicente Briones Continuation High School (13,150 SF)	New Campus (Lease-Leaseback)	2017	\$6.9M	\$0	Jon Novero	Quattrocchi Kwok Architects 636 5th Street Santa Rosa CA 95404 Ray Keck 707.576.0829 rayk@qka.com	JL Modular, Inc. 70 Stony Point Rd., Ste. D Santa Rosa, CA 95401 Jeff Luchetti 707.527.5788 jeffl@jlcbuild.com	Greg Birtchet (925) 234-1500 gbirtchet@att.net
Alhambra High School Parking Lot Expansion	Modernization	2018	\$363K		Jon Novero	LCC Engineering & Surveying 930 Estudillo Street Martinez, CA 94553 925-228-4218 Christine Parks cmp@lcc-inc.com	Northern Pacific Corp. 870 Napa Valley Corp. Way Napa, CA 94558 Bradley Koeberer 707-939-0595 brad.koeberer@northern-pacific.com	Greg Birtchet (925) 234-1500 gbirtchet@att.net
Las Juntas Playfield - Measure WW	Modernization	2018	\$873K		Jon Novero	LCC Engineering & Surveying 930 Estudillo Street Martinez, CA 94553 925-228-4218 Christine Parks cmp@lcc-inc.com	Pacific Coast General Eng. 12 Industry Road Pittsburg, CA 94565 Henry Sam Baugh 925-252-0214 sam@pcge.biz	Greg Birtchet (925) 234-1500 gbirtchet@att.net
District-wide Photovoltaic Project (System size - 1401 KWP)	Design/Build Solar Projects	2015	\$5.8M	\$0	Jon Novero	Quattrocchi Kwok Architects 636 5th St. Santa Rosa CA 95404 Ray Keck 707.576.0829 rayk@qka.com Sage Renewables 12315 Sir Francis Drake Blvd. Inverness, CA 94937 Robert Johnson 415.662.0014	Solar City 3055 Clearview Way San Mateo, CA 94402 Anatalia Beckett 650.918.9778	Greg Birtchet (925) 234-1500 gbirtchet@att.net

**PITTSBURG UNIFIED SCHOOL DISTRICT**  
 2000 Railroad Avenue  
 Pittsburg, CA 94565

Dr. Janet Schulze, Superintendent  
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 Dr. Barbara Wilson, Superintendent (Retired)  
 (925) 250-2385

PROJECT NAME / LOCATION	PROJECT TYPE	PROJECT COMPLETED	VALUE	CO's	LEAD STAFF	ARCHITECT	CONTRACTOR	IOR
Riverside Continuation High School (30,000 SF)	New Campus (Lease-Leaseback)	2012	\$12M	(\$19K)	Jon Novero Gino Elliot	California Design West Mitch McAllister (916) 446-2466 mmcallister@ca-dw.com	Broward Builders 1200 E Kentucky Avenue Woodland, CA 95776 (530) 666-5635 Matt Medeiros	Mike Camigi
Foothill Elementary School	Modernization	2011	\$2.2M	\$96K	Jon Novero John Hansen		Multi-Prime	Todd Stalon 9088 (925) 766- siservices1@hotmail.com
Pittsburg High School / Creative Arts Building / HVAC Replacement (40,000 SF)	Modernization (Lease-Leaseback)	2012	\$2.3M	(\$112K)	Jon Novero John Hansen		Roebelen Contracting, Inc. 1241 Hawks Flight Ct, Ste. 100 El Dorado Hills, CA 95762 Bill Sheets	David Hitchinson davidhitchinson@comcast.net 415-899-0083  Bob Hitchinson roberthitchinson@sbcglobal.net 415-342-3411
Pittsburg High School (220,000 SF)	New Campus	2011	\$74M	\$1.1M	Jon Novero Gino Elliott Rich Dunlap Molly Vanden		S.J. Amoroso 390 Bridge Parkway Redwood Shores, Ca 94065	David Hitchinson davidhitchinson@comcast.net 415-899-0083  Bob Hitchinson roberthitchinson@sbcglobal.net 415-342-3411
Range Road Middle School (82,000 SF)	New Campus	2008	\$30.1M	\$434K	Jon Novero Rich Dunlap Julie VanSickle		West Coast Contractors 2320 Courage Drive Ste. 111 Fairfield, CA 94533	David Hitchinson davidhitchinson@comcast.net 415-899-0083
Marina Vista Elementary School (58,000 SF)	New Campus	2009	\$19.1M	\$600K	Jon Novero Gino Elliott Molly Vanden		Arutz Builders 19 Pamaron Way Novato, Ca 94949	Bob Hitchinson roberthitchinson@sbcglobal.net 415-342-3411



Hillview Middle School

RGM and Associates assisted the Menlo Park City School District with comprehensive facility studies, master planning and community outreach efforts which led to the passage of a \$91M local bond campaign in 2006. RGM provided master budgets, master schedules, and assisted in all facets of planning and implementation of the District's capital improvement program. RGM has also provided funding support and helped the District procure an additional \$21M in funding from the State, including Joint-Use funds to increase the District's total bond program beyond \$112M. RGM has been especially active in working with the community to facilitate their understanding of the District's planning and construction program, 21<sup>st</sup> century technology, sustainable and green program goals. In 2012 we began planning for a new 18 classroom elementary school on a surplus site which led to the passage of a local bond. The project started in July 2015 and opened in September of 2016.

## Menlo Park City School District

181 Encinal Ave., Atherton, CA  
94027

**2006 Bond Program: \$112M**

**2013 Bond Program: \$31M**

### School Sites

- Elementary Schools 4
- Middle Schools 1
- New Schools (Under Construction) 1

### Client Contact

Ahmad Sheikholeslami  
Chief Business & Operations Officer  
650-321-7140 ext. 5614  
asheikholeslami@mpcsd.org

### Project Architect:

DLM Architects  
Erwin Lee  
(415) 255-1811  
elee@dml.com

## Tracy Unified School District

1875 W. Lowell Avenue,  
Tracy, CA 95377

**Total Bonds: \$203M**

### School Sites:

- Elementary Schools: 7
- Middle Schools: 2
- High Schools: 3
- K – 8 Schools: 4
- Alternative Schools: 4

### Client Contact:

Bonny Carter  
Director of Facilities and Planning  
209-830-3201  
bcarter@tusd.net

### Project Architect:

RainforthGrau Architects  
Jeff Grau  
(916) 368-7990



Tracy High School

RGM and Associates has been assisting the Tracy Unified School District with comprehensive planning, program development and construction management services since 2006. We have administered the District's programs through three local bond measures (Measure E in 2006 for \$51M, and Measure S in 2008 for \$43.1M). During this time, we assisted the District with entering the State Building Program to augment local bond proceeds with state matching funds where eligible and helped obtain an additional \$27.5M to augment the Measure E program. RGM was instrumental in developing the facility assessment to develop and obtain successful approval of the 2008 Measure S Bond Campaign RGM recently assisted the District with an updated assessment and bond planning that led to an \$82M bond measure approved by the voters in June of 2014 and are currently managing the program.

**MENLO PARK CITY SCHOOL DISTRICT**  
 181 Encinal Avenue  
 Atherton, CA 94027

Maurice Ghysels Ed.D., Superintendent  
 mghysels@mpcsd.org  
 (650) 321-7140  
 Ahmad Sheikholeslami, CBO  
 asheikholeslami@mpcsd.org  
 (650) 321-7140

PROJECT NAME / LOCATION	PROJECT TYPE	PROJECT COMPLETED	VALUE	CO's	LEAD STAFF	ARCHITECT	CONTRACTOR	IOR
Laurel School Upper Campus	Lease-Leaseback	Sept. 2016	\$31M	0	Eric Scheuermann	DLM Architects Erwin Lee (415) 255-1811 info@dmlarchitects.net	Roebbelen 1241 Hawks Flight Court El Dorado Hills, CA 95762	Helmut Bugarsky bcinspections@att.net 650-740-8080
Hillview Middle School Increment 1	New Construction	2013	\$41M	\$1.2M incl solar	Brenda Parella Jamie Ferranti		Overaa Construction 200 Parr Blvd. Richmond, CA 94801 carl@overaa.com 510-234-0926	George Kalligeros Elmast Inspection Services gnkali@yahoo.com 415-240-1432
Laurel Elementary School	New Classroom Building F	2011	\$1.3M	\$37K			Ralph Larsen & Son 300 8th Avenue San Mateo, CA 94401 650-579-0339	
Laurel Elementary School	New Classrooms Buildings D & E	2011	\$4.3M	\$536K	Brenda Parella Jamie Ferranti Julie Van Sickle		D.L. Falk Construction 3526 Investment Blvd. Hayward, CA 94545 510-887-6500	
Encinal Elementary School	New Multi-Purpose Building & Three New Two Story Classroom Buildings	2011	\$11M	\$640K			D.L. Falk Construction 3526 Investment Blvd. Hayward, CA 94545 510-887-6500	
Oak Knoll Elementary School	New Multi-Purpose Building & Classrooms 4 - 5	2010	\$9M	\$736K			Gonsalves & Stronck 1000 Washington Street San Carlos, CA 94070 650-802-2960	
Oak Knoll Elementary School	Modernization Playfield Improvement	2011	\$2.7M	\$116K	Ralph Capulo		Ralph Larsen & Son 300 8th Avenue San Mateo, CA 94401 650-579-0339	
Bond Planning	Modernization / New Construction	2008	\$112M	NA			Various	
Bond Planning	Modernization / New Construction	2014	\$31M	NA	Ralph Capulo		N/A	

**TRACY UNIFIED SCHOOL DISTRICT**  
 1875 W. Lowell Avenue  
 Tracy, CA 95476

Dr. Brian R. Stephens, Superintendent  
 bstephens@tusd.net  
 (209) 830-3201  
 Bonny Carter, Director of Facilities & Planning  
 bcarter@tusd.net  
 (209) 830-3245

PROJECT NAME / LOCATION	PROJECT TYPE	PROJECT COMPLETED	VALUE	CO's	LEAD STAFF	ARCHITECT	CONTRACTOR	IOR
South/West Park Elementary School Additional and Modernization	New Construction (Lease-Leaseback)	Nov. 2016	\$15M	\$45K	Anthony Continente Jeff Gilchrist	Rainforth Grau Architects Jeff Grau 2407 J Street, Suite 202 Sacramento, CA 95816 (916) 368-7990	Broward Construction Shawn Appleton 1200 E. Kentucky Avenue Woodland, CA 95776 (530) 866-5635	Chuck Walker cwalk42@aol.com 209-579-2041
West High School, Theatre	New Construction (Lease-Leaseback)	2012	\$3.7M	\$-84K (-2%)	Anthony Continente	Rainforth Grau Architects Michael Rainforth 2407 J Street, Suite 202 Sacramento, CA 95816 (916) 368-7990	F&H Construction Brian Roek 1115 Lockeford Street Lodi, CA 95241 (209) 931-3738	Chuck Walker cwalk42@aol.com 209-579-2041
Monte Vista Elementary School	Modernization (Lease-Leaseback)	2014	\$11.5M	\$284K	Anthony Continente Ramon Parocua	Rainforth Grau Architects Michael Rainforth 2407 J Street, Suite 202 Sacramento, CA 95816 (916) 368-7990	Roebbelen Contracting Bill Sheets 1241 Hawks Flight Ct, Ste. 100 El Dorado Hills, CA 95762 (916) 939-1149	Chuck Walker cwalk42@aol.com 209-579-2041
McKinley Elementary School	Modernization (Lease-Leaseback)	2014	\$6.1M	\$200K	Anthony Continente, Ramon Parocua,	Rainforth Grau Architects Michael Rainforth 2407 J Street, Suite 202 Sacramento, CA 95816 (916) 368-7990	Roebbelen Contracting Bill Sheets 1241 Hawks Flight Ct, Ste. 100 El Dorado Hills, CA 95762 (916) 939-1149	Chuck Walker cwalk42@aol.com 209-579-2041
West High School, Theatre	New Construction (Lease-Leaseback)	2012	\$3.7M	\$-84K (-2%)	Anthony Continente	Rainforth Grau Architects Michael Rainforth 2407 J Street, Suite 202 Sacramento, CA 95816 (916) 368-7990	F&H Construction Brian Roek 1115 Lockeford Street Lodi, CA 95241 (209) 931-3738	Chuck Walker cwalk42@aol.com 209-579-2041



Martinez Junior High School • Martinez Unified School District

## ADDITIONAL DATA

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Additional Data– None



Alhambra High School, Martinez Unified School District



Rancho Medanos Junior High School • Pittsburg Unified School District

## CONFLICTS OF INTEREST

CONFLICTS OF INTEREST – None



RGM and Associates does not have a conflict of interest with the proposed services included in the Request for Statement of Qualification and Request for Proposals for Program and Construction Management Services for the Mt. Diablo Unified School District, nor would we propose to provide service which could be questioned or perceived as a conflict of interest.

RGM and Associates is proposing to provide full service program and construction management services. RGM does not want to introduce a conflict of interest by doing construction as part of the program.





Marina Vista Elementary • Pittsburg Unified School District

## CURRENT & CONTRACTED PROJECTS

RGM and Associates is currently providing Construction Management Services to the following K-12 Public School Districts:

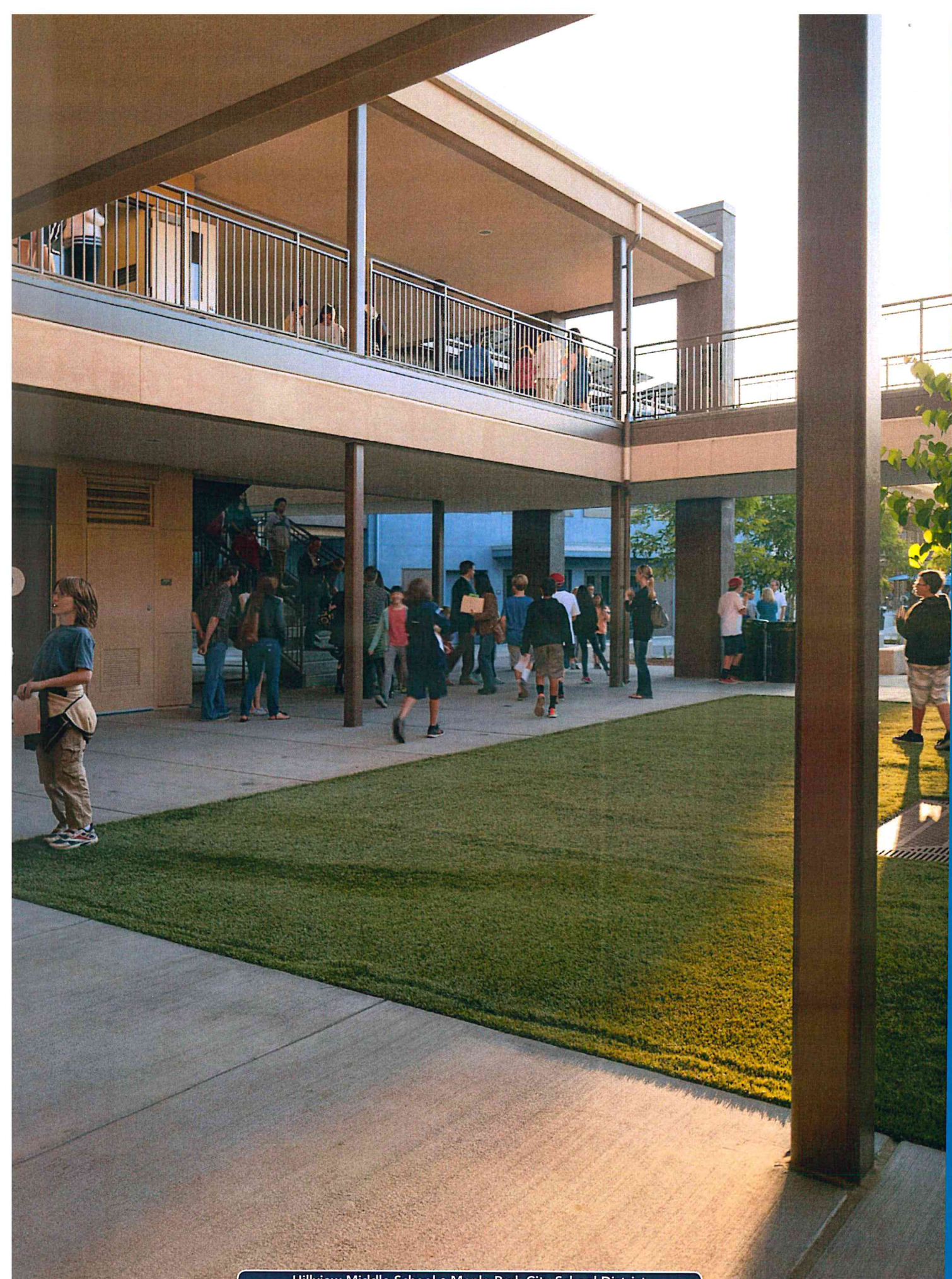
### Main Concord Office:

Antioch Unified School District Construction 2013 - 2018	\$56.5M Modernization and New Construction, Antioch HS Full Service Bond and Construction Management Services - Completed
Brentwood Union ESD Construction 2016 - 2021	\$104.3M Modernization and New Construction Full Service Bond and Construction Management Services
Lafayette School District Construction 2017 - 2020	\$70M Modernization and New Construction, Full Service Bond and Construction Management Services
Martinez Unified School District Construction 2019 - 2027	\$120M Modernization, New Construction and Prop 39 Improvement Full Service Bond and Construction Management Services
Monterey Peninsula Unified SD Construction 2016 - 2021	\$268.5M Modernization and New Construction Full Service Bond and Construction Management Services
Moraga Unified School District Construction 2017 - 2020	\$33M Modernization and New Construction Full Service Bond and Construction Management Services
Redwood City School District Construction 2016 - 2022	\$55.5M Modernization and New Construction DSA Closeout Support Services, Bond Program Planning
San Leandro Unified School District Construction 2016 - 2021	\$104M Bond Program Full Service Bond and Construction Management Services
Tracy Unified School District Construction 2013 - 2020	\$82M Modernization and New Construction, District Wide Full Service Bond and Construction Management Services

### Santa Rosa Office:

Oak Grove Union School District Construction 2017 - 2019	\$4M Planning and Construction Management Services Various facility improvements, including new modular classroom additions
Pope Valley Union School District Construction 2018 - 2020	\$4M Planning, Construction Management and Funding Support Modernization and New Modular Construction
Sebastopol Union School District Construction 2018 - 2019	\$5M Planning, Construction Management and Funding Support Modernization of MPR; Facility Hardship Support
West County Transportation Agency Construction 2018-2019	\$3.3M Facility Expansion New building addition, followed by site expansion project

RGM has the resources to provide and complete CM services to its existing clients, as well as to effectively manage projects for Mt. Diablo Unified School District. For over 25 years, RGM has reliably managed K12 facility programs for its clients that have varied in size and complexity. Our extensive experience and our responsive management approach allow us to staff up and down, in order to provide the exact level of services our clients require.



## CONSTRUCTION ELIGIBILITY

RGM and Associates acknowledges and understands, if selected to Represent the District as the Program Manager/CM Firm, RGM and Associates would be precluded from submitting any other proposal(s) or bid as a Prime Contractor or Subcontractor for any portion of any Project and further may not have any interest in any potential entities that submit any proposals or bids on any project within the District.



John Swett High School, Building D, John Swett Unified School District



Deer Valley High School • Antioch Unified School District

## AGREEMENT FORM

The RGM Team received a copy of the standardized agreement for Construction Management services used by the Mt Diablo Unified School District, including the indemnity provisions and professional liability provisions contained therein. If given the opportunity to contract with District, the RGM Team has no objection to the use of this agreement.

RGM would like to confirm on a project by project basis the services required in order to eliminate potential duplication between other District Consultants and Staff that could incur additional cost.

RGM and Associates works with most legal firms representing public School Districts and typically does not have any substantive comments or objections to the form of Agreement included in the Request for Qualifications and Proposals for Construction Management Services for the Mt. Diablo Unified School District.

RGM looks forward to the opportunity to work with the District and its legal counsel in finalizing the scope of services and contract to manage the program.



Los Medanos College, Contra Costa Community College District

## DVBE PARTICIPATION - OUTREACH

RGM will solicit DVBE participation in the procurement of goods and services for the District pursuant to OPSC and District requirements. In addition, general contracting and trade bidding processes will incorporate DVBE goals and other district participation guidelines and requirements in the bid documents and instructions to bidders.

RGM will be pro-active in working with the Mt. Diablo Unified School District in the development of a DVBE contact list in order to notify and encourage participation as projects evolve.

RGM is very familiar with the DVBE requirements for projects utilizing State funds. While DVBE is not required for projects utilizing local District or private funds, it can be included if the District so desires. Because Districts can sometimes receive backfill funding from the State, it is often prudent to include these provisions when the potential for State funds is uncertain.

RGM is also cognizant of the District's goal to promote outreach to local vendors and contractors and will include DVBE and local vendor solicitation in our Project Outreach Protocol as required by the client.



*Los Medanos College, Diablo Valley College District*

## SUB-CONSULTANTS

None Proposed

RGM and Associates has sufficient staff and expertise available to perform all the tasks outlined in the Request for Qualifications for Construction Management Services for the Mt. Diablo Unified School District.

We do not anticipate hiring any sub-consultants.



Hillview Middle School, Encinal Elementary, school, Laurel Elementary, Menlo Park City School District, Menlo Park, CA



MT. DIABLO UNIFIED SCHOOL DISTRICT  
EXHIBIT "E"

**FINANCIAL INTEREST CERTIFICATION**  
***(Public Contract Code section 3006)***

PROJECT/CONTRACT NO.: \_\_\_\_\_ between Mt. Diablo Unified School District  
("District" or "Owner") and RGM and Associates ("Consultant /  
Engineer") ("Contract" or "Project").

I Ralph J. Caputo, RGM and Associates  
Name Name of Consultant / Engineer

certify that I have not offered, given, or agreed to give, received, accepted, or agreed to accept, any gift, contribution, or any financial incentive whatsoever to or from any person in connection with the roof project contract on this project. As used in this certification, "person" means any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Furthermore, I Ralph J. Caputo, RGM and Associates  
Name Name of Consultant / Engineer

certify that I do not have, and throughout the duration of the contract, I will not have, any financial relationship in connection with the performance of this contract with any Consultant, engineer, roofing consultant, materials manufacturer, distributor, or vendor that is not disclosed below.

I Ralph J. Caputo, RGM and Associates  
Name Name of Consultant / Engineer

do not have a financial relationships with a Consultant, engineer, roofing consultant, materials manufacturer, distributor, or vendor, or other person in connection with the following roof project contract:

Name of firm ("Firm"): RGM and Associates

Mailing address: 3230 Monument Way, Concord, CA 94518

Addresses of branch office used for this Project: \_\_\_\_\_

If subsidiary, name and address of parent company: \_\_\_\_\_

I certify that to the best of my knowledge, the contents of this disclosure are true, or are believed to be true.

Date: 3/19/19

Proper Name of Consultant / Engineer: RGM and Associates

Signature: 

Print Name: Ralph J. Caputo

Title: CEO/President

MT. DIABLO UNIFIED SCHOOL DISTRICT  
EXHIBIT "F"

**IRAN CONTRACTING ACT CERTIFICATION**  
**(Public Contract Code § 2204)**

PROJECT/CONTRACT NO.: \_\_\_\_\_ between Mt. Diablo Unified School District  
("District" or "Owner") and RGM and Associates ("Consultant /  
Engineer") ("Contract" or "Project").

Pursuant to Public Contract Code (PCC) section 2204, an Iran Contracting Act certification is required for solicitations of goods or services of one million dollars (\$1,000,000) or more.

Consultant / Engineer shall complete **ONLY ONE** of the following two paragraphs.

1. Consultant / Engineer's total Fee is less than one million dollars (\$1,000,000).  
**OR**
2. Consultant / Engineer's total Fee is one million dollars (\$1,000,000) or more, but Consultant / Engineer is **not** on the current list of persons engaged in investment activities in Iran created by the California Department of General Services ("DGS") pursuant to Public Contract Code § 2203(b), and Consultant / Engineer is not a financial institution extending twenty million dollars (\$20,000,000) or more in credit to another person, for 45 days or more, if that other person will use the credit to provide goods or services in the energy sector in Iran and is identified on the current list of persons engaged in investment activities in Iran created by DGS.  
**OR**
3. Consultant / Engineer's total Fee is one million dollars (\$1,000,000) or more, but the District has given prior written permission to Consultant / Engineer to submit a proposal pursuant to PCC 2203(c) or (d). **A copy of the written permission from the District is included with this Agreement.**

I certify that I am duly authorized to legally bind the Consultant / Engineer to this certification, that the contents of this certification are true, and that this certification is made under the laws of the State of California.

Date: 3/19/19

Proper Name of Consultant / Engineer: RGM and Associates

Signature: 

Print Name: Ralph J. Caputo

Title: President/CEO

**MT. DIABLO UNIFIED SCHOOL DISTRICT  
EXHIBIT "G"**

**COMPLETED BY ALL PRIME CONSULTANTS**

**Consultant Name:** RGM and Associates

Identify those Businesses with which you intend to sub-consult; the work to be sub-consulted, the percentage of work to be sub-consulted and the type of subcontractor i.e. Small, Local, Emerging, Disabled Veteran or other/decline to state. Definition of these categories can be found on the accompanying form.

"A" Business Name	"B" Work Scope	"C" Percentage	"D" Type of Subcontractor
RGM and Associates	Construction Management Services	100%	CM FIRM

**\*\*\*DUPLICATE THIS FORM AS NECESSARY\*\*\***

**MT. DIABLO UNIFIED SCHOOL DISTRICT  
EXHIBIT "H"**

**TO BE COMPLETED BY ALL CONSULTANTS AND SUB CONSULTANTS**

Consultants/Sub-Consultant Name: RGM and Associates

I declare under penalty of perjury that my business is (check all that apply):

- Small Business – A Small Business is one whose gross sales are less than \$1 million annually.
- Local Business – A Business headquartered in Contra Costa County.
- Emerging Business – An Emerging Business is one who has been business less than five years. I started my business on \_\_\_\_\_.
- Disabled Veteran-Owned Business – A Disabled Veteran-Owned Business is one that has a current certification from a California public agency. Certification must be attached.
- Other Businesses – A business, which does not meet any of the other definitions above, or for which the consultant or sub-consultant declines to state its category.

If it is determined that the information contained herein is not true and correct, I will not be allowed to do work (begin, finish, complete) for the Mt. Diablo Unified School District.

Consultant/Sub-consultant: RGM and Associates

Address: 3230 Monument Way

City, State, Zip Code: Concord, CA

Phone Number: 925-671-7717

Fax Number: 925-671-7788

Name, Title: Ralph J. Caputo, President/CEO

Signature:  \_\_\_\_\_

**Q11:** Page 7, Fee Proposal Table: There are 2 identical examples with tables to be filled out. Does the District want the information duplicated or are the examples supposed to be different? Please clarify.

1. Estimate/Quote

1. Fee Schedule

Note: The basis of fee calculation is the net of approved Staffing Plan and the number of hours of work on the approved schedule for the Fee Table Budget for Construction Management Services. [Click Here to View Details of Construction and Management Fee Schedule for approved Staffing Plan](#)

Fee Proposal (M Multiple Phase Project - Maintenance Phase)

Phase & 2019 Fee Calculation for the Fee Table Budget

Labor (Staffing)	Hourly	Wk	Wk	Wk	Wk	Wk
Phase 1/2/3/4/5/6/7/8/9/10						
Phase 1/2/3/4/5/6/7/8/9/10						
Phase 1/2/3/4/5/6/7/8/9/10						
Phase 1/2/3/4/5/6/7/8/9/10						
Phase 1/2/3/4/5/6/7/8/9/10						
Phase 1/2/3/4/5/6/7/8/9/10						
Phase 1/2/3/4/5/6/7/8/9/10						
Phase 1/2/3/4/5/6/7/8/9/10						
Phase 1/2/3/4/5/6/7/8/9/10						

Subtotal 1

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Hourly Rate and Burden of Direct Labor, Overhead, Burden, Fringe and Profit

M/S A/E/C Construction Management Services

M/S Name Street School District

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Item Label/Service/Conditions, Exclusions	Unit/Rate	# of Weeks/Months	Subtotal
Travel			
Per Diem			
Telephone			
Equipment			
Other			

Subtotal 2

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Total Estimated (M/Phase, Fee Table, General Conditions, Blank Costs) \$

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Estimate & or Construction Value

**A11:** The District is looking for responses for the staff that would be working full-time or part-time, and the cost per week on said sample project.

**Q12:** Page 7, Fee Proposal Table: Does the FT/Hourly Rates mean Full Time Hourly Rate, Hr/PT mean Part Time Hourly Rate, and Wk mean weekly hourly rate?

Duration: (Indicate duration of construction)

Labor (Staffing)	FT/ Hourly Rates*	Hr/ PT	Wk


**A12:** **FT/Hourly** is the cost of that per if they work full time.  
**H/PT** is the cost of that person if they work on the sample project part time.  
 Please note the asterisk defining hourly rate as: "Hourly Rates are inclusive of Direct Labor, Overhead, Burden, Fringe and Profit".  
**Wk** is defined as the cost of that person for the week.

**Q13:** Page 10, What specific information does the District want us to include for "billing practices" other than pay schedule, reimbursables costs, and additional services hourly rates?

2. Please also provide detailed information on your billing practices (pay schedule), including reimbursable cost categories and hourly billing rates by position for additional services.

**A13:** The District is interested in an example the firms billing applications and breakdown of items listed.

**Vendor to sign as acknowledgment of receipt and return with RFP response(s).**

Signature: 

Date: 3/19/19

Company Name (please print) RGM and Associates



11. INQUIRIES

# INQUIRIES

---

Inquiries – None



Antioch High School, Antioch Unified School District

RGM and Associates does not have any concerns or questions regarding the RFQ process or its specifications.



Marina Vista Elementary • Pittsburg Unified School District





Program Managers  
 Construction Managers  
 General Contractors

**PROGRAM & CONSTRUCTION MANAGEMENT SERVICES  
 STANDARD FEE SCHEDULE**  
 Effective January 1, 2019

Classification	Rate
Principals	\$ 182.00
Program Director / Project Executive	165.00
Senior Program Manager	160.00
Senior Project Manager	155.00
Project Manager / Superintendent	150.00
Estimator / Scheduler / Plan Reviewer	145.00
Project Engineer / Foreman	120.00
Contracts / Move Manager	115.00
Project Coordinator	95.00
Project Compliance Manager	90.00
Contract Administrator	75.00
Administrative Assistant	60.00
Clerical Support	55.00

The above rates include all taxes, insurance, health and welfare benefits, overhead and profit. Rates also include cell phone, usage rates, laptop / PC for staff.

The fees indicated in this Addendum shall not be changed for the duration of the project identified in this Addendum, unless agreed to in writing by the parties and approved by the district's board.

The fees for one (1) year from the date of this agreement, shall not exceed the above rates.

RGM and Associates does not have a minimum "show-up" charge.

The mark up on any approved item of Extra Services performed by Consultant shall not exceed five percent (5%)

Mileage to/from Projects is not reimbursable as Extra Services

The OPSC schedule is provided, as reference.

OPSC Fee Calculations/Construction Management Fees

First \$500,000	8.0%
Next \$500,000	7.5%
Next \$1 Million	7.0%
Next \$4 Million	6.0%
Next \$4 Million	5.0%
Costs in excess of \$10 Million	4.0%

the District that may have a potential to conflict with Firm's ability to provide the Services described herein to the District. Firms cannot submit, propose, bid, contract, sub-contract, consult, or have any other economic interests in the Project to which the Firm may provide Services.

8. **Firm's Current Work Commitments.** Specify the current and projected workload of Firm and describe Firm's ability to complete the Services as required herein.
9. **Construction Eligibility.** The Firm(s) selected to provide Construction Management Services under this RFQ will be precluded from submitting proposals or bids as a prime contractor or subcontractor to construct any portion of any Project and may not have interest in any potential entities submitting proposals or bids on any project.
10. **Required Forms.** Please include in this section all required SOQ forms as well as any Small, Local, Emerging, and Disabled Veteran Business Enterprises (S,L,E, DVBE) certifications. The completion of the attached form in the RFQ is not a condition for qualification submittal, but is a condition of award of a contract. See Exhibits G and H for additional information.
11. **Inquiries.** For inquiries concerning the RFQ process, or questions regarding specifications, please contact in writing Elizabeth McClanahan, Purchasing/Warehouse Director at [mcclanahane@mdusd.org](mailto:mcclanahane@mdusd.org).

2. **Compensation.**

1. **Fee Schedule.**

Note: The basis of compensation will be on an approved Staffing Plan and Reimbursables Schedule which once negotiated becomes the Task Order Budget for Construction Management Services. Provide hourly rate sheets for all personnel and positions that could be assigned to the work.

**Fee Proposal - CM Multiple Prime Project – Modernization (Phased)**

Assume a \$10.5M Construction Value (High School Site)

Duration: (indicate duration of construction)

Labor (Staffing)	FT/ Hourly Rates*	*Hr/ PT	Wk	# of Weeks	Amount
Project Manager	\$ 6,000 -	29%		127	\$ 222,750 -
Site Superintendent	\$ 6,000 -	100%		75	\$ 450,000 -
Project Engineer	\$ 4,800 -	46%		127	\$ 277,950 -
Project Controls	\$ 6,400 -	12%		127	\$ 96,750 -
Administrative	\$ 3,800 -	56%		127	\$ 269,700 -

Subtotal: \$ 1,317,150 -

ONE MILLION THREE HUNDRED SEVENTEEN THOUSAND ONE HUNDRED FIFTY -

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\* Hourly Rates are inclusive of Direct Labor, Overhead, Burden, Fringe and Profit

Non-Labor General Conditions/Reimbursables	Unit Costs	# of Weeks/Months	Subtotals
Fencing	\$ 1,058 82	17 Mos	\$ 18,000 -
Portable Restrooms	\$ 1,248 00	17 Mos	\$ 21,216 -
Site Trailer	\$ 572 00	17 Mos	\$ 9,724 -
Trailer Installation	\$ 4,160 00	1 LS	\$ 4,160 -
Equipment Lease			N/A
Other	\$ 50,524 00	1 LS	\$ 50,524 -

Subtotal: \$ 103,624 -

ONE HUNDRED THREE THOUSAND SIX HUNDRED TWENTY FOUR -  
Written in long hand

Total Estimated CM (Labor, Non-Labor General Conditions, Reimb. Costs): \$ 1,420,774 -

ONE MILLION FOUR HUNDRED TWENTY THOUSAND SEVEN HUNDRED SEVENTY FOUR -  
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Estimated % of Construction Value: 13.53 %

\*\*\*\*\*

**Fee Proposal-CM Multiple Prime Project – Modernization (Phased)**

Assume a \$10.5M Construction Value (High School Site)

Duration: (indicate duration of construction)

Labor (Staffing)	FT/ Hourly Rates*	Hr/ PT	Wk	# of Weeks	Amount
Project Manager	\$ _____				\$ _____
Site Superintendent	\$ _____				\$ _____
Project Engineer	\$ _____				\$ _____
Project Controls	\$ _____				\$ _____
Administrative	\$ _____				\$ _____

Subtotal: \$ \_\_\_\_\_

Written in long hand

\* Hourly Rates are inclusive of Direct Labor, Overhead, Burden, Fringe and Profit

*Thank You*

**RGM and Associates would like to thank  
Mount Diablo Unified School District for considering our firm for your projects.**



# STATEMENT OF QUALIFICATIONS FOR PROGRAM AND CONSTRUCTION MANAGEMENT SERVICES

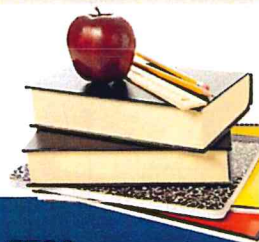
PRESENTED TO:



**Mount Diablo Unified School District**



Program Managers  
Construction Managers  
General Contractors



3230 Monument Way | Concord, CA 94518 | 925 671-7717 | FAX 925-671-7788

<http://www.rgmassociates.com>