



**AGENDA  
FACILITIES COMMITTEE**

**Monday, September 26, 2022 at 12:00 P.M.  
Virtual and In-Person at Administrative Office  
1<sup>st</sup> Floor Community Room, 138 S. Brandon Rd., Fallbrook**

**In accordance with California Government Code Section 54953 teleconferencing will be used for this meeting. Board members, staff and members of the public will be able to participate by webinar by using the following link: <https://us02web.zoom.us/j/84595811563>  
Meeting ID: **845 9581 1563** Participants will need to download the Zoom app on their mobile device. Members of the public will also be able to participate by telephone using the following dial in information: **Dial in #: (310) 372-7549, Passcode 660448.****

Committee Members: Barbara Mroz and Stephanie Ortiz

Staff: CEO Rachel Mason, Executive Assistant Linda Bannerman, Wellness Center Administrator Theresa Geracitano, Administrative Officer Judith Oswald

Property Manager: Roy Moosa

1. Call to Order/Roll Call
2. Public Comments - Announcement  
Members of the public may address the Board regarding any item listed on the Agenda at the time the item is being considered. Members of the public attending in-person need to fill-out a "Request to Speak" card and those attending by webinar need to raise your hand at this time and identify the Agenda item they would like to speak on. The Board has a policy limiting any speaker to not more than five minutes.
3. Discussion Items
  - a. Construction Management (CM) Proposals
4. Update from Wellness Center Administrator
5. Update from Property Manager
6. Board comments and future agenda items
7. Adjournment

I certify that on September 23, 2022, I posted a copy of the foregoing agenda near the regular meeting place of the Board of Directors of Fallbrook Regional Health District, said time being at least 24 hours in advance of the meeting. The American with Disabilities Act provides that no qualified individual with a disability shall be excluded from participation in or denied the benefits of District business. If you need assistance to participate in this meeting, please contact the District office 24 hours prior to the meeting at 760-731-9187.

A handwritten signature in blue ink that reads "Linda Bannerman". The signature is written in a cursive style and is positioned above a horizontal line.

Board Secretary/Clerk

**CUMMING**

Building Value Through Expertise

[cumming-group.com](http://cumming-group.com)



# Fallbrook Regional Health District

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Construction Management Services for Community Health and Wellness Center

September 16, 2022

Building  
Value  
Through  
Expertise

September 16, 2022

Fallbrook Regional Health District  
Attention: Rachel Mason, Chief Executive Officer  
138 S. Brandon Road,  
Fallbrook, California 92028  
[rmason@fallbrookhealth.org](mailto:rmason@fallbrookhealth.org)

**Re: Request for Proposals to Provide Construction Management Services for Community Health and Wellness Center for Fallbrook Regional Health District**

Dear Ms. Mason,

On behalf of Cumming Management Group, Inc. (Cumming), I am pleased to present our qualifications to provide construction management services for the design and construction phases of the renovation and redesign of your Community Health and Wellness Center for Fallbrook Regional Health District. This project will provide a critically needed modernization and will enhance the community's experience. Our team has had the opportunity to collaborate with Taylor Design on other projects and looks forward to the opportunity to continue that working relationship for the District. Our team has extensive experience with public projects, working on occupied sites and campuses, scheduling phasing and logistics, leading community and stakeholder engagement, and ensuring site safety. We, at Cumming, are genuinely excited about the prospect of working with the Fallbrook Regional Health District to deliver such an important project.

As demonstrated herein, Cumming has been providing these services to clients throughout California for over 26 years. With our seasoned project team, decades of extensive local experience in California, and collaborative project approach, Cumming is uniquely qualified and well-positioned to provide you with expert services that meet all your needs. Specifically, our team brings the following benefits to this project:

**An Experienced Project Team with Excellent References** — Our project team has deep knowledge, extensive experience, and excellent references from completing hundreds of projects in California - including multiple projects together. Our team includes seasoned veterans in project management and construction management, cost estimating, scheduling, and many more. Our team members also include Certified Construction Managers, Licensed Architects, Professional Engineers, DBIA members and Energy-Sustainability certified experts. Our project leadership is among the strongest in the industry.

**Demonstrated Project Process with Similar Projects** — Our key goals are to deliver your project on budget, within schedule, and to the highest level of quality. Cumming's core philosophy is "Manage each project like we own it." Our team proactively leads, challenges, motivates, and directs team members to generate superb results that save money and time, mitigate risk, and achieve our clients' delivery goals. Our team has performed over \$20 billion in project and construction management for projects all over California, including extensive renovation work for municipalities.

**Integrated Management Services** — Cumming is truly an integrated Construction and Project Management services company. We will manage your project from our San Diego office with support from our other Southern California offices located in Murrieta, Aliso Viejo and Los Angeles. Our breadth and depth of experts that we use collaboratively, makes Cumming unique from our competition.

As Executive Vice President and the District's proposed Project Executive, I will be responsible in an oversight capacity for work and will lead our construction management and project management planning team. I am the authorized officer of the firm representing Cumming in all matters and will bind the firm to all commitments made in the response. Thank you for this opportunity to submit our statement of qualifications.

Sincerely,

Cumming Management Group, Inc.



Anthony L. Sanchez, RME, DBIA Assoc  
Executive Vice President

Section

1



Identification of the Proposer

## Section 1 Identification of the Proposer

a) Legal name and address of company	Cumming Management Group, Inc. 15010 Ave. of Science, Ste. 100 San Diego, CA 92128
b) Legal form of company (corporation, partnership, etc.)	Corporation

c) Address, phone number, facsimile number, email address, website address, direct email address of the person(s) that will be primarily responsible for providing services for this proposal and for coordinating the RFP document.	
Address:	15010 Ave. of Science, Ste. 100 San Diego, CA 92128
Phone number:	323.855.4710
Facsimile number:	858.673.9263
Email address:	ASanchez@cumming-group.com
Website address:	www.cumming-group.com
d) California Business License Number	956988



Cumming is able to meet the insurance requirements set forth in the RFP.



### RECENT CM EXPERIENCE WITH PUBLIC SECTOR CLIENTS

- City of Mountain View
- City of Arcadia
- City of Claremont
- City of Glendale
- City of Long Beach
- City of Los Angeles
- City of Pomona
- City of San Clemente
- City of San Diego
- City of Santa Monica
- County of Los Angeles
- County of San Bernardino
- County of San Diego
- Riverside County Sheriff's Department
- City of Menifee
- City of Lancaster
- City of Vista
- City of Del Mar, City of Carlsbad
- Port of San Diego
- LA County Metropolitan Transportation Authority
- Mountains Recreation and Conservation Authority

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**We strongly believe that our role is to implement the vision of our client.**

Section

3



Executive Summary



## Section 3 Executive Summary

**Provide an overview of the entire proposal describing the general approach or methodology the Proposer will use to meet the goals and fulfill the general functions required as a Construction Management.**

Cumming's philosophy is "Manage each project like we own it." We create value for our clients through our proven expertise and build lasting relationships based on trust, reliability, and results. Our team brings extensive experience working on publicly-funded projects, on and around occupied sites. Most of our recent work has required coordinating complex phasing and logistics to ensure site safety, while keeping the community and stakeholders informed.

Cumming provides its services to public agencies as an owner's representative; we work collaboratively and transparently with client stakeholders to deliver services that achieve our client's goals and objectives. Our core values are:

- **Client Focus** is central to who we are and is a fundamental component of our success. We listen to our clients and provide services and solutions that meet their needs.
- **Team Members** are the life and blood of our organization. It has always been the combined experience and effort of our team members that has made Cumming successful. Knowing this, we hire only the very best people.

- **Integrity** is more than just operating within the parameters of the law: It is also about being ethical and moral. As one team member put it, "It not only has to be right, it also has to look and feel right." At Cumming, integrity is about treating people and companies the way we want to be treated. It is about doing what we say we are going to do and following through. Simply stated, we do the right thing, always.
- **Quality** has been, and will always be, our core differentiator. We have a culture of continuous improvement, whereby our collective progress as a company is achieved through the ongoing personal growth of our team members.

### Executive Summary of the Proposal

Cumming's submittal includes responses to each of the items required in the RFQ. Below, we have listed these items in order (excluding this Executive Summary) and provided a summary of our response to each.

#### Section 1: Identification of the Proposer

We have provided a letter of interest and other specific company information requested in the RFQ.

**26 Years**  
of Owner's Rep and Project  
Management Experience

More than **2,500**  
Public Sector Projects  
Successfully Completed in  
California Alone.

A Portfolio of over  
**\$300 Billion**  
in Construction Nationally



**The delivery of  
each project  
on-budget,  
on-schedule, and  
on-quality is our  
primary goal for  
every client.**

**Section 2: Table of Contents**

A table of contents is provided at the beginning of the proposal.

**Section 3: Executive Summary**

We have provided an overview of the entire proposal describing our general construction management approach.

**Section 4: Firm Information and Experience**

Cumming is a C Corporation and was founded in 1996 and incorporated in 2006 in the State of California. Cumming has over 26 years of experience providing construction management services for various public sector clients. We have provided an overview of our services and provided a list of all proposed personnel for the Fallbrook Community Center Project.

**Section 5: Proposed Project Management Team**

We have summarized our proposed team members' qualifications in this section for the District's consideration. Our team is prepared to address the full range of construction management services to meet your needs.

**Section 6: Project Specific Experience**

We have provided our most relevant construction management contracts for public agencies. These examples

highlight the program management expertise of our proposed team members.

**Section 7: Proposed Methods to Accomplish the Work**

Cumming's project managers proactively lead, challenge, motivate and direct teams to generate superb results that save money and time, mitigate risk, and achieve our clients' delivery goals. We have elaborated on our approach, expertise, and experience in preconstruction, bid phase, construction and closeout, post construction, and QA/QC.

**Section 8: Knowledge and Understanding of the Local Environment**

Cumming has been performing construction management services in the San Diego County region since its inception. As a result of this experience, we are adept at managing internal resources, maintaining personnel flexibility, and assigning experts quickly and efficiently. Cumming would provide services for the Fallbrook Community Center project from our San Diego office, with as needed support from our other California office locations.

**Section 9: Fee Schedule**

Cumming has included our proposed personnel, their classifications, and hourly rates, including overhead and profit.

# Full Service Construction Management

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

- Entitlements
- Program/Project Scoping
- Master Schedule Development
- Master Budget Development
- Design Criteria Development
- Consultant Procurement
- Design Management
- Delivery Process Selection
- Program/Project Controls
- Constructability Reviews
- Bid Facilitation
- Sustainability Consulting
- Cash Flow Reporting
- Cost Management
- Quality Control/Quality Assurance
- Value Engineering
- FF&E Coordination
- Punchlist Facilitation
- Commissioning
- Program/Design Review
- Contract Administration
- Feasibility Studies
- Pay Application Processing
- Change Order Management
- Earned Value Reporting
- Document Control
- Schedule Management
- Environmental Compliance
- Building Assessments
- Cash Flow Analysis
- Risk Analysis & Management
- Community Outreach
- Labor Compliance
- PLA Administration
- Closeout Reporting
- Document Archiving
- Financial Closeout
- Energy Services



Section

4



Firm Information and Experience



## Section 4 Firm Information and Experience

**a) Provide total number of professional staff employed by the firm.**

Cumming is one of the nation's fastest-growing providers of construction management services. Now, in our 26th year in business, Cumming has 1,400+ employees in 52 offices worldwide.

**b) Demonstrated experience in the management of construction projects.**

Established in 1996, Cumming is an industry leader in providing project and construction management, cost estimating, scheduling, quality control, and other related services. Collectively, our local portfolio accounts for more than \$20B in construction - nearly all of which has been completed in the State of California, giving us an unmatched level of experience here in the State.

**c) The Proposer shall state the number of years the firm has conducted business. Proposer must have at least six (6) years experience in providing the outlined scope of required services for public clients and/or public projects.**

Cumming has conducted business for 26 years including experience outlined in the scope of services for the District. Our project experience includes the completion of more than 2,500 public projects for cities or public agencies, bringing extensive experience and in-house knowledge to your project.

Through our experience, we have honed our approach to provide top-notch construction management services, including everything from comprehensive construction management to cost management/estimating, scheduling, energy consulting, dispute resolution and avoidance services, and more. We have the unique ability to offer not only comprehensive project and construction management, but also à la carte services at

**Cumming has supported more than 2,500 public projects in California, bringing extensive expertise and in-house knowledge to the District.**

any stage of project development. Our team members bring extensive experience working on and around occupied sites and campuses, scheduling complex phasing and logistics, leading community and stakeholder engagement, and ensuring site safety.

**Strictly Owner Advocates**

The key characteristic that differentiates Cumming from other construction industry service providers is Cumming's unwavering role as strictly an owner's representative and project manager. Many of our competitors design and/or build facilities while also attempting to represent owners fairly and objectively. True advocacy is not always possible when the Owner's interests are not the primary interests.

**The Cumming Team**

Cumming is considered a premier provider of construction management services. As such, Building Design + Construction ranks Cumming #7 among the nation's top 75 construction managers, and we have ranked on Engineering News-Record's listing of the Top 100 Construction Management-For-Fee firms for 16 years in a row, the last three of which we were in the top 20.

Partial Listing of California Municipal Clients		
City of Arcadia	City of Long Beach	City of San Ramon
City of Berkeley	City of Los Angeles	City of Santa Clara
City of Beverly Hills	City of Mountain View	City of Santa Monica
City of Buena Park	City of Palm Desert	City of Sierra Madre
City of Burbank	City of Palm Springs	County of Los Angeles
City of Carlsbad	City of Palo Alto	County of Orange
City of Claremont	City of Poway	County of Riverside
City of Desert Hot Springs	City of Rancho Mirage	County of San Bernardino
City of Glendale	City of San Clemente	County of San Diego
City of Irvine	City of San Dimas	County of San Mateo

Section

5



Proposed Program Management  
Team



## Section 5 Proposed Program Management Team

Identify key members that will be assigned to the Wellness Center Project support. Indicate the role of each individual. Include a resume reflecting the educational backgrounds as well as the skills and experience as construction management in design and construction phases. The Construction Manager must demonstrate an ability to be able to draw upon a multidisciplinary staff to address Construction Management services.

### Proposed Personnel

Our proposed team structure is organized to provide the Fallbrook Regional Health District with the greatest value, flexibility, and expertise working with multiple stakeholders, from procurement and to post-construction. Our team will work closely with your staff and facilities group. We have selected team members to support the daily efforts of our project in key personnel roles, as well as in supporting resource roles. The team organizational chart can be found below.



## Daniel Silva

Sr. Project Manager

### Education

B.S., Construction Management, School of Engineering, California State University, Fresno

### Industry Affiliations

Member, Construction Management Association of America (CMAA), Southern California Chapter

### Software Proficiency

e-Gordian  
Expedition  
Microsoft Office  
Microsoft Project  
Procore  
Prolog  
RSMMeans  
SureTrack

Daniel is a results-oriented, senior project construction manager with over 15 years of construction and project management experience and a creative problem-solving attitude. He has a successful track record in multiple sectors, successfully completing projects for public works, public infrastructure, and healthcare facilities clients. Throughout his career, Daniel has lead and managed complex small, medium and large-scale programs and projects while ensuring that all project components are compliant with approved project documents, applicable laws and regulations and all work is performed safely and within legal requirements.

Daniel is core proficiencies include cost management, schedule management, quality assurance, contract administration, change order management and stakeholder engagement. Public sector clients include County of San Diego – Department of General Services, Department of Homeland Security, City of Vista and Palomar College.

### Relevant Experience – Public Works

#### Department of Homeland Security, Construction Project Manager

- Supported client in managing lifecycle of new construction, capital repair, renovations and/or alteration from concept development, planning, execution, close-out and occupancy phases for various projects, such as:
  - El Centro Sector-Window Security Upgrades
  - El Centro Sector-Security Lighting Upgrades
  - El Centro Sector-Earthquake Repairs (Interior and Exterior)
  - El Centro Sector-Hazardous Material Abatement and Demolition of OIT Buildings
  - San Diego Sector-New Vehicle Maintenance Building (\$3M)
  - Yuma Sector-AC Installation Upgrade and Replacement of Existing Split System
  - Yuma Sector-Parking Lot Canopy Repairs
- Provided management and oversight of the multi-phased modernization and reconstruction for the largest land Port of Entry in the United States with a budget of over \$741M.
- Ensured Government requirements and regulations were implemented within each project (FAR & CBP Security and Design Guidelines), as well as the execution of daily Operational Impact Plans.
- Negotiated and coordinated project designs, specification packages, budget objectives and schedules with customer agencies, including development of scope of work, estimating, leading team meetings, and providing project oversight.
- Collaborated with multiple disciplines including all stakeholders and key leadership in various federal agencies, state and local governments, non-profits, community organizations, contracting officers/COR and special interest groups.
- Coordinated space management and/or build-out of leased or client owned space by evaluating cost, schedule, and performance through all phases of construction including Phase I reports and cost studies for new construction, repairs and alteration type projects

#### County of San Diego, Department of General Services, Construction Project Manager

- Managed JOC (Job Order Contracting) process for multiple capital improvement projects including developing scope of work, contractor cost proposal reviews, RFI, submittals and change order negotiations.
- Conducted asset management activities and performed real estate and environmental compliance assessments.
- Implemented energy savings audits and drought response measures at County owned or leased facilities.

**Daniel Silva**  
Sr. Project Manager

- Projects include:
  - Camp Barrett Dormitory Remodel, Restroom Addition, and Interior Upgrades (\$950K)
  - Camp Barrett Removal and Installation of New Staff Dormitory Trailers (\$600K)
  - Camp Barrett Laundry Facility Relocation and Upgrades (\$50K)
  - Camp Barrett New ADA Assessable Walkway (\$180K)
  - Camp Barrett CCTV and Security Systems Upgrades (\$250K)
  - County of San Diego, Department of General Services, SDG&E On-Bill Financing Rebate & Incentive Program, Energy Efficiency Upgrades (\$2M)

**ADDITIONAL PROJECTS**

- Culver City Redevelopment Agency, Culver City Senior Center, Culver City, CA (\$8.4M)
- San Ysidro Land Port of Entry, Modernization and Expansion, San Ysidro, CA (\$741M)
- Children's Hospital Los Angeles, Surgery Center and Central Plant, Los Angeles, CA (\$65M)
- City of Costa Mesa, Police Department Reconstruction and Addition, Costa Mesa, CA (\$22.5M)
- City of Santa Clara, New Police Station, Santa Clara, CA (\$12.6M)
- City of Vista, Avo Movie Theater Reconstruction, Vista, CA
- City of Vista, Fire Station No. 1, New Construction, Vista, CA
- City of Vista, Fire Station No. 3, Exterior Repairs, Vista, CA
- City of Vista, Fire Station No. 4, Exterior Repairs, Vista, CA
- City of Vista, Fire Station No. 4, Water Damage Repairs, Vista, CA
- California State University, Northridge, Biomedical Facility, Northridge, CA (\$90M)
- City of Pomona, Centralized Service Center, Pomona, CA (\$4M)



## Anthony Sanchez, RME, DBIA Assoc.

Project Executive (As-Needed)

### Education

Construction Management,  
Rancho Santiago College,  
Santa Ana, CA

### Licenses

California Licensed General  
Building Contractor (B),  
Contractor State License Board,  
License No. 956988

### Certifications

DBIA Associate, Design-Build  
Institute of America

OSHA 10, Occupational Safety  
and Health Administration, US  
Department of Labor

### Affiliations

Construction Management  
Association of America  
(CMAA), Southern California  
Chapter

### Awards

LAUSD Chief Facilities  
Executive Recognition Award,  
Construction Golden Hammer

CMAA Project Achievement  
Awards:

- Anaheim Union High School District, Katella High School DROPS Site Improvement Project (2018)
- Long Beach Unified School District, Wilson High School Auditorium Renovation (2019)
- Anaheim Union High School District, Anaheim High School Aquatics Center Project (2020)

Anthony Sanchez represents Cumming as the Executive Vice President responsible for managing major capital improvement projects and programs throughout California while serving as Cumming's Project Executive and Principal-in-Charge for various K-12 school districts, community colleges, higher education institutions and local municipalities. In this role, Anthony directs the management and operations for Cumming's education and public works portfolio that exceeds over \$7 billion dollars of public construction.

With 30+ years of experience within the construction industry, Anthony has been involved with the program, project, and construction management, design management, schedule and cost management, contract administration, and stakeholder engagement for multimillion and billion-dollar programs and projects throughout all phases of construction.

### Relevant Experience

Since 2000, Anthony has served as Cumming's Executive Vice President, Project Executive and Principal-in-Charge for multi-million and billion-dollar local municipalities and government agencies, K-12 school districts, community colleges, higher education institutions, and other public entities. Responsibilities include the management, oversight, and successful execution of large and complex construction programs and projects, such as:

- Anaheim Elementary School District
- Anaheim Union High School District
- Central Basin Municipal Water District
- City of Arcadia
- City of Irvine
- City of Long Beach
- City of Oxnard
- City of Pomona
- City of Santa Monica
- City of Thousand Oaks
- Compton Unified School District
- Coachella Valley Unified School District
- County of Los Angeles
- County of Orange
- Glendale Community College District
- Glendale Unified School District
- Hacienda La Puente Unified School District
- Judicial Council of California
- Long Beach Unified School District
- Los Angeles Community College District
- Los Angeles Unified School District
- Newport-Mesa Unified School District
- Norwalk-La Mirada Unified School District
- Orange County Sheriff's Department
- Orange Unified School District
- Occidental College
- Pepperdine University
- Rancho Santiago Community College District
- Riverside County Sheriff's Department
- San Diego Unified School District
- Santa Monica-Malibu Unified School District
- Scripps College

## Kunal Shah, EIT, LEED AP

Scheduler (As-Needed)

### Education

Master of Construction Management, University of Southern California, Los Angeles, CA

Bachelor of Engineering in Civil Engineering, DDIT, Gujarat University, India

### Registrations

Engineer-in-Training (EIT), Board for Professional Engineers, Land Surveyors and Geologists, State of California

LEED Accredited Professional (LEED AP), U.S. Green Building Council

### Affiliations

Member, American Society of Civil Engineers (ASCE)

Member, Construction Management Association of America (CMAA)

Member, U.S. Green Building Council (USGBC)

Kunal is a seasoned construction management professional with over 20 years of experience in program management, project management, and program controls—18 of which has been within the public works sector. Kunal's extensive experience includes forensic scheduling analysis, critical path analysis, time impact analysis, recovery schedules, cost and resource loaded schedules, among others, having served in management roles on large and complex multi-million and billion-dollar construction programs throughout Southern California.

With his experience successfully managing projects on behalf of owners and as a general contractor, Kunal has vast experience in delivering projects using various project delivery methods such as lease-leaseback, design-build, traditional design-bid-build, multi-prime, among many others. In addition to scheduling and controls, Kunal is highly proficient in programming, design management, construction management, cost management, estimating, contract administration, risk analysis and change order negotiation. His project portfolio includes over \$400 million in campus facilities programs, as well as programmatic experience in excess of \$9 billion.

### Relevant Experience

- City of Carson, Water Pollution Control Plant (\$60 million)
- Los Angeles CC District, Sustainable Building Program(\$9.6 billion)
- Los Angeles Southwest College, Campus-Wide Bond Improvements (\$404 million)
- West Los Angeles College, Campus-Wide Bond Improvements (\$414 million)
- Anaheim ESD, Sunkist and Roosevelt ES Projects
- Anaheim UHS District, District-Wide Bond Improvements (\$249 million)
- Glendale USD, District-Wide Bond Improvements (\$270 million)
- Long Beach USD, Measure K and E Bond Program (\$1.5 billion)
- Los Angeles USD, Bell Education Center, Bell, CA (\$27 million)
- Los Angeles Unified School District, District I Existing Buildings Renovation Program, Los Angeles, CA (\$170 million)
- Los Angeles USD, New Construction Program (\$230 million)
- Los Angeles USD, South Region High School #9 (\$68 million)
- Norwalk-La Mirada USD, Benton Middle School (\$7.7 million)
- Norwalk-La Mirada USD, Corvallis Middle School (\$6.5 million)
- Orange USD, District-Wide Bond Improvements (\$288 million)
- Cathedral of Our Lady of Angels, Los Angeles, CA (\$250 million)

## Alan Campbell, MRICS, NEBOSH

Cost Estimator (As-Needed)

### Education

B.S., Quantity Surveying,  
Abertay University, Dundee,  
Scotland, UK

### Certifications

Certified Member, Royal  
Institution of Chartered  
Surveyors, No. 0856490

NEBOSH General Certificate,  
National Examination Board in  
Occupational Safety and Health

Alan has worked in the construction industry since 1994. He is an experienced professional who has focused his career on providing cost management consulting services. Alan also possesses experience in construction planning and has held roles in commercial and residential development and management. Alan has collaborated on a broad range of project types throughout his career, including healthcare, transportation, education, public works, and industrial remediation.

As Managing Director of Cost Services, Alan utilizes his vast knowledge of all aspects of the cost estimating process. He performs services which support pre-construction, construction, and post-construction phases, including but not limited to, cost planning, milestone estimating, quantity take-offs, site walks, bid reconciliation, preparation of valuations, pricing validation, and change order claim review. Alan also possesses a strong background in arbitration and dispute resolution.

### Relevant Experience

- City of Costa Mesa, City Hall Restrooms Access/ADA Upgrades, Costa Mesa, CA
- City of Irvine, Turtle Rock Community Center ADA Upgrades, Irvine, CA
- City of Lake Forest, New Civic Center, Lake Forest, CA
- City of Long Beach, Bayshore Library/Blair Field/Silverado Park Facilities Condition Assessments, Long Beach, CA
- City of Ontario, Office TIs for Public Works-Annex Central Services-Dev. Director's Office, Ontario, CA
- City of Santa Ana, New Civic Center ADA Access Pedestrian Ramps, Santa Ana, CA
- City of Santa Maria, Historic Enos Ranch House Refurbishment & New Gardens-Barn-Sitework to Create New Park/Museum, Santa Maria, CA
- County of Los Angeles, Metropolitan Central Arraignment Court Renovation of Holding Cells & Clerks Office, Los Angeles, CA
- OC Fair and Event Center, Campus Master Plan incl. New Admin. Bldg.-Barn Replacement-New Educ. Center-Main Entrance Reloc., Costa Mesa, CA
- Orange County Water District, Annex Building Locker Room/Restroom Area Remodel, Fountain Valley, CA
- Riverside County Public Health, Laboratory Facility Renovation & Expansion, Riverside, CA
- San Diego Assoc. of Governments, Toll Operations/Data Center Renovation Options, San Diego, CA
- Transportation Corridor Agencies, Office Space Remodel/Improvement Options, Irvine, CA
- City of Huntington Beach, Police Dept. Addition & Renovation of Basement/1st Floor, Huntington Beach, CA
- County of L.A., Consolidated Correctional Treatment Facility Project Peer Review incl. New Facilities & Roadway Infrastructure, Los Angeles, CA
- County of Los Angeles, Metropolitan Central Arraignment Court Renovation of Holding Cells & Clerks Office, Los Angeles, CA
- Co. of San Bernardino, Sheriff's Office Space Programming for NARC/SED, San Bernardino, CA
- L.A. County Sheriff's Dept., Santa Clarita Valley Station Replacement, Santa Clarita, CA
- Orange County Sheriff's Dept., Central Jail Remodel, Santa Ana, CA
- Orange County Sheriff's Dept., James A. Musick Jail Expansion Ph. 2, Irvine, CA
- Orange Co. Sheriff's Dept.-James A. Musick Facility, Cost Estimate Update of Phases 1 & 2 Jail Expansion, Irvine, CA

# Brianna Quintanar

## Project Controls Manager (As-Needed)

### Education

B.S., Business Management,  
San Diego State University, San  
Diego, CA

MBA, Concentration in Project  
Management, Mount St. Mary's  
University, Los Angeles, CA

### Certifications / Affiliations

Certified Associate in Project  
Management (CAPM®)

PMI® Member - Project  
Management Institute, Global  
and Los Angeles Chapter

### Software Proficiency

Microsoft Office  
Adobe  
Prolog  
Eden  
CAPP Analytics

Brianna has over seven years of experience in the construction field, all of which has been in the public sector arena. She has proven her value in construction by utilizing her project controls skills while working with Anaheim Union High School District, Orange Unified School District, and the City of Inglewood. As an excellent organized communicator, Brianna is an asset to any construction team.

### Relevant Experience

#### City of Inglewood, Various CIP Projects

Reviewed and identified transfer and adjustments of the expenditure of special funds supporting Capital Improvement Projects; Assisted the Project Managers on project budget issues; Assisted the Project Managers with amendment exhibits to contracts; Created budget transfers and produced financial closeouts; Compared previous and current years CIP lists, identifying added Capital Projects for various fiscal years; Prepared detailed summaries of appropriation adjustments of Capital Projects for previous years; Assisted project team staff with A/E contracts, bid and contract planning; Assisted on project budget, schedule, and issues; Produced multi-year summaries of Capital Projects expenditures and completed projects

#### Los Angeles International Airport (LAX), Tom Bradley International \$1.2 Billion Renovation Project

Reviewed/ submitted over 600 IIPP Safety Binders making sure necessary documentation and requirements were met in accordance with LAWA; Review RFI/s Submittals/COP's; Compiled data and created yearly analysis reports for over 2,000 courses/orientations within and amongst contracting companies for using Microsoft Excel, Microsoft PowerPoint, and Adobe Acrobat; Reviewed, processed and input employee data for over 20,000 workers using Microsoft Access; Reviewed/ documented over 569 IIPP subcontractors onsite making sure standards adhered to Cal OSHA

#### Anaheim Union High School District, \$250M Measure H Bond Program, Anaheim, CA

Brianna served as Project Coordinator at Anaheim Union HS District for the Districts \$250M Measure H Bond Program. Responsibilities included assisting with project planning, funding tracking, Board of Trustee and Citizens' Oversight Committee reports, design management and construction management. Evaluated contract change orders and amendments for impact on budget and schedule. Participated in change order negotiations. Conducted construction/project site visits for progress reporting. Analyzed actual expenditures versus budget performance. Coordinated and supported the processing and approval of construction change documentation including Change Directives, Change Order, Contractor's Change Requests, and other documents, as required.

#### Orange Unified School District, \$188M Measure S Bond Program, Orange, CA

Brianna provided support as Project Coordinator for the District's first ever bond program. Assisted in review of submittal procedures, RFIs and monthly invoices. Responsibilities included validating invoices against executed agreements. Resolving any issues with consultants regarding outstanding invoices. Generating Project Reports addressing all aspects of project development and completion.

## Michael Echelmeier, DBIA, LEED AP, Assoc. AIA

### Constructability Review (As-Needed)

#### Education

Bachelor of Architecture,  
California Polytechnic State  
University, San Luis Obispo, CA

#### Certifications

DBIA Professional, Design-  
Build Institute of America

LEED Accredited Professional,  
U.S. Green Building Council

AIA Associate, American  
Institute of Architects

Michael has worked in the construction and design industry since 1989 and has been involved in all aspects of the design-construction process, including constructability reviews, planning, pre-design, cost estimating, design, scheduling, project management, and construction management. This experience has allowed Michael to obtain a complete understanding of construction methods and practices.

In his role performing constructability reviews, Michael is responsible for reviewing contract documents to ensure compliance with the program requirements, relevant codes and standards, and meet the objectives for the respective project. His objective is to identify and reconcile ambiguous and conflicting design elements and through the review, Michael may also conduct visual site inspections to help identify potential impediments to the design and construction process.

#### Relevant Experience

- City of Arcadia, City Hall Renovations, Phase II, Arcadia, CA
- Antelope Valley Union High School District, New Eastside High School Back Check, Lancaster, CA
- Berkeley Unified School District, Jefferson Elementary School Modernization, Berkeley, CA
- Castro Valley USD, Measure G Construction Support Services, Castro Valley, CA
- Chino Valley Unified School District, Multiple Modernization and Addition Projects, Chino, CA
- Colton Joint Unified School District, Abraham Lincoln Elementary School Modernization, Colton, CA
- Emery Unified School District, Emery High School, Fire Sprinklers, Emeryville, CA
- Glendale Unified School District, Measure S Bond Program, Glendale, CA
- Lake Elsinore Unified School District, Elsinore High School, Baseball Field-Courtyard-Civil Improvements, Wildomar, CA
- Morgan Hill Unified School District, Districtwide Campus Needs Assessment, Morgan Hill, CA
- Pasadena Unified School District, Blair High School, Chemistry/Biology Classrooms, Pasadena, CA
- Santa Maria-Bonita School District, Taylor Classroom Addition, Santa Maria, CA
- Tustin Unified School District, Beckman High School, Classroom Building Additions and Renovations, Tustin, CA
- Woodland Joint Unified School District, New Spring Lake Elementary School, Woodland, CA
- Yuba City Unified School District, Yuba City High School #2, Yuba City, CA

Section

6



Project Specific Experience



## Section 6 Project Specific Experience

The Proposer shall provide a description of the three (3) most relevant construction management contracts held by the firm. Preference will be given to construction management services for public agencies within the last five years. Please include:

- a. Role of the firm.
- b. Dollar value of the program.
- c. Project description including the name of the Construction Manager.
- d. Staffing.
- e. Relationship to client.
- f. Contact name, position, entity name, telephone number, facsimile number, email address.



### *Mountain View Community Center, Mountain View, CA*

**Role of the firm:** Program and Construction Management

**Dollar value of the program:** \$18.3 million

**Project Description including the name of the Construction Manager:** Cumming provided complete Program and Construction Management for an \$18 million LEED Silver City Community Center with new ground-up construction and renovations to existing building, including: large community room; roads, parking, infrastructure and new stop light installation; day care center with outdoor children’s play area; walking paths and picnic areas; complete new landscaping and lighting for park areas.

**Construction Manager:** Franklin Dickinson– Cumming Management Group, Inc.

**Staffing:** Construction Manager/Project Director – Franklin Dickinson (Cumming Management Group, Inc.)  
Project Executive – John Olsson (Cumming Management Group, Inc.)  
Project Manager – Katie Bipes (Cumming Management Group, Inc.)

**Relationship to client:** Cumming has a great relationship with the City, having worked with the City for over four years.

**Contact name, position, entity name, telephone number, facsimile number, email address:** David Printy, Sr. Project Manager, City of Mountain View, 650.903.6162, david.printy@mountainview.gov



## *Mendez High School Wellness Center, Los Angeles Unified School District*

**Role of the firm:** Program and Construction Management

**Dollar value of the program:** Program Value:  
\$7,000,000,000 (Measure RR)  
Project Value: \$9,000,000

**Project Description including the name of the Construction Manager:** Cumming provided Project & Construction Management Services for the Manuel Arts High School Wellness Center project. This included the construction of a new single-story clinic building on the Los Angeles Unified School District Mendez High School campus. The wellness center provides medical, dental, and mental health services to the school and surrounding community.

**Construction Manager:** Artin Mgrtichian – Cumming Management Group, Inc.

**Staffing:** Design Manager – Bill Fellers (Cumming Management Group, Inc.)  
Construction Manager – Artin Mgrtichian (Cumming Management Group, Inc.)

**Relationship to client:** Cumming has provided comprehensive project and construction management services to Los Angeles Unified School District's Facilities Services Division for over 20 years.

**Contact name, position, entity name, telephone number, facsimile number, email address:** Issam Dahdul, Senior Facilities Development Manager - South Region, LAUSD Facilities Services Division – Asset Management 213.241.6478, [issam.dahdul@lausd.net](mailto:issam.dahdul@lausd.net)

**Delivery Method:** Design-Build

**Year Completed:** 2020

## *Manual Arts High School Wellness Center, Los Angeles Unified School District*

**Role of the firm:** Program and Construction Management

**Dollar value of the program:** Program Value:  
\$7,000,000,000 (Measure RR)  
Project Value: \$7,000,000

**Project Description including the name of the Construction Manager:** Cumming provided Project & Construction Management Services for the Manuel Arts High School Wellness Center project. This included the renovation of the existing single-story clinic and construction of a new adjacent single-story clinic building on the Los Angeles Unified School District Manual Arts High School campus. The wellness center provides medical, dental, and mental health services to the school and surrounding community.

**Construction Manager:** Artin Mgrtichian – Cumming Management Group, Inc.

**Staffing:** Design Manager – Bill Fellers (Cumming Management Group, Inc.)  
Construction Manager – Artin Mgrtichian (Cumming Management Group, Inc.)

**Relationship to client:** Cumming has provided comprehensive project and construction management services to Los Angeles Unified School District's Facilities Services Division for over 20 years.

**Contact name, position, entity name, telephone number, facsimile number, email address:** Issam Dahdul, Senior Facilities Development Manager - South Region, LAUSD Facilities Services Division – Asset Management 213.241.6478, [issam.dahdul@lausd.net](mailto:issam.dahdul@lausd.net)

**Delivery Method:** Design-Build

**Year Completed:** 2020





## Modoc Healthcare District

**Role of the firm:** Program and Construction Management

**Dollar value of the program:** \$38 million

**Project Description including the name of the Construction Manager:** Cumming was the project manager for the District for design and construction of a new, modern critical access hospital facility situated on a new site that is owned by the District adjacent to Highway 299. The Project consisted of a new steel-framed hospital facility (type 2A non-combustible construction), and a new steel-framed outpatient and support services building (type SA construction).

The new hospital has a building area of approximately 27,000-sq.-ft. and will consist of Registration; Admitting and Lobby; an 8-bed Nursing Department; 1 Operating Room; Central Sterile Supply and Processing; an Emergency Department; a Radiology Department with 1 RF, 1 CT, and 1 Ultrasound; Clinical Laboratory; Pharmacy; Dietary; Housekeeping; Laundry; and Storage. The outpatient and support services building is approximately 16,500-sq.-ft. and consists of Administration and Support Services, Outpatient Clinic, Physical Therapy, Clinical Laboratory, and Materials Management and Maintenance. The two buildings are physically attached from an operational standpoint, but physically separated by both fire and occupancy separations.

Cumming’s role was to assist the District with completion of the Project Program, procurement of the Design-Builder and other necessary construction, and to help the District oversee and manage the design and construction process during all phases of the Project, including commissioning.

**Construction Manager:** Richard Kasa - Cumming Management Group, Inc.

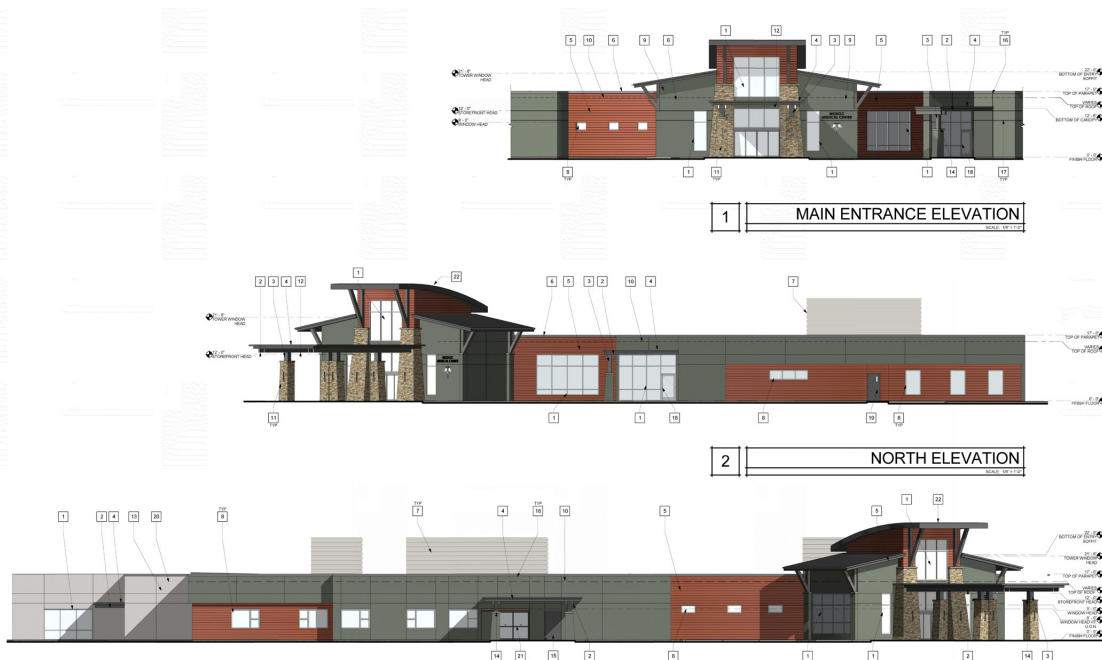
**Staffing:** Construction Manager – Richard Kasa (Cumming Management Group, Inc.)

Project Coordinator – Kristi Edwards (Cumming Management Group, Inc.)

Project Executive - Frank Fernandez

**Relationship to client:** Cumming has a great relationship with the Client.

**Contact name, position, entity name, telephone number, facsimile number, email address:** Kevin Kramer, CEO, Modoc Medical Center, 530.233.5883, k.kramer@modocmedicalcenter.org





## *County IDIQ Program, County of San Bernardino, CA*

**Role of the firm:** Project and Construction Management

**Dollar value of the program:** Varies per project

**Project Description including the name of the Construction Manager:** Cumming has provided project/construction management, cost estimating, and scheduling services — including bid phase management, RFP development, and contract negotiations — to the County for various construction projects on an as-needed basis since 2005. These services have been completed over the course of several years.

The program also includes energy efficiency and conservation block grant projects, minor remodels, restorations, and ADA improvements throughout. Seismic work includes new footings, shear walls and drag beams throughout the building. The County engaged Cumming after two years of construction when the current construction manager and general contractor failed to meet original scheduled completion. In addition, Cumming was engaged as the Owner's Agent to resolve all disputes and outstanding issues impacting the new scheduled completion date. After three months of Cumming leadership, all outstanding issues were resolved, and the schedule was improved by eight weeks.

**Construction Manager:** Varies per project

**Staffing:** Varies per project

**Relationship to client:** Cumming has a great relationship with the County and has been providing services to the County since 2005.

**Contact name, position, entity name, telephone number, facsimile number, email address:** Joel Garnica, Supervising Project Manager, 909.387.5224, joel.garnica@pmd.sbcounty.gov

Section

7



Proposed Methods to Accomplish  
the Work



## Section 7 Proposed Methods to Accomplish the Work

### Approach

Cumming specializes in construction management. We are 100% dedicated to protecting our client's interests through all phases of the design and construction, while understanding that a successful project is one that allows all involved entities to be successful. Cumming's project specific construction management plan (CMP) will offer a defined approach to take the project from its current state through completion of all construction, closeout, and initial occupancy activities. The critical factors to successful projects include:

- Well-defined goals and milestones
- Extensive, thorough early planning
- Good leadership, management, and supervision
- Positive and effective relationship with end-users, CMAR, subcontractors, design professionals and consultants.
- Proper project team chemistry
- Quick response to changes/adaptive to potential funding changes or requests

Our proven management work plan incorporates each of these critical success factors. Municipal projects and programs comprised of renovations, additions, and new construction not only require a tremendous dollar investment but also a great deal of planning, design, and management to see projects through from the moment the first funds are available to the day they are completed.

### Effective Public Engagement

Working with the District and Stakeholders, our team will create a Community Involvement Plan. Together, we will create a toolbox of options that provide real time, valuable project information to the community. Specifically, some of the tactics we recommend include:

- Timely progress updates on the District website.
- Potentially creating a public-facing project website where community members can go to find up-to-date news about the project, see progress photos, find contact information for public liaisons or community representatives, and more. Cumming has participated in the development of numerous such websites and can lead this effort on your behalf.
- Live and virtual community events held at multiple locations, times and languages.

### Pre-Construction Phase

Our holistic approach during the Preconstruction Phase is crafted to create a seamless transition from design through preconstruction, construction, close out, and warranty. We include team members from the Design Team, Cumming's Operations Team, and most importantly, the Facilities and Construction department for input prior to the bidding documents being issued. This creates team alignment and

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*Our team brings extensive experience with projects on occupied sites, requiring complex phasing and logistics to ensure site safety.*

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certainty that all expectations and priorities will be clear and achieved.

### Developing Value Engineering Options

To develop reliable, practical value engineering options, Cumming leverages the "lessons learned" from our current workload. We are involved in over 400 projects per month, providing us with significant data to evaluate each project and determine the best way to balance cost and quality in a variety of scenarios. Utilizing our own vast cost database, we will ensure that all of the reported construction costs are benchmarked—on a cost per square foot (or other functional unit) basis—against other comparable facilities "leveled" for time and location. This will demonstrate where specific cost drivers or opportunities exist, as well as validate that reported costs are in line with industry standards.

### Constructability Reviews

The ideal time to mitigate design conflicts is in the preconstruction phase prior to bid. Constructability reviews are critical to time, cost control, and claims avoidance. We will assign multi-disciplinary professionals to assess the Contract Documents for clarity, integration of plans and specifications, constructability of details and absence of ambiguities. Our team members are able to review systems and details serving as a "second set of eyes" to ensure that the drawings and specifications put out to bid are complete, constructible, and of the highest quality. Our reviews will specifically address issues such as:

- Constructability of construction details
- Lead time for materials and equipment
- Reasonableness of performance of work sequence, interface relationships and periods
- Site access, restrictions, staging areas, availability of utilities for construction, and safety plans for pedestrian and vehicular traffic for ongoing operations
- Coordination within and between disciplines relative to the plans and specifications
- Assurance that references to statements such as "designed by others" are addressed

Our goals in performing Interdisciplinary and Constructability Reviews are:

- A reduction in the amount of change orders
- A reduction in delays caused by change orders
- A reduction in Requests for Information (RFIs)
- A savings in construction administration time and effort
- A smoother, non-adversarial relationship between the parties involved
- A better construction project at final delivery

Throughout the process, we will periodically review construction documents, plans, and specifications to achieve project goals.

#### **Staff / Facilities Coordination around Sequencing, Safety, and Logistics**

Our team will work closely with your staff and facilities group. We will carefully plan out the sequencing, safety, and logistics prior to the start of construction. The agreed upon strategy will be incorporated in the construction bid documents to ensure that the proposing contractors are aware of logistical and coordination constraints prior to submitting their bids. This ensures claims are minimized as they relate to site logistics and coordination efforts.

*Working with all stakeholders, Cumming will develop a phasing plan to address your project's unique phasing requirements, interdependency of different needs, swing space constraints, path of travel, evacuation routes etc.*

#### **Cost and Schedule Control**

We will regularly evaluate the progress of each construction contract to forecast potential budget and schedule variances. Cumming cost and schedule reporting will identify problems and proposed solutions: including schedule and cost status and show time and cost to complete the contract. The monthly progress evaluation will compare actual expenditures against budget, and as-planned performance against actual performance. The reports will also summarize the preceding month's developments, plans for the current month, future plans, requests, recommendations, and general comments.

#### **Project Controls**

Cumming is a leader in the implementation of project controls, and we have staff members that are experts in all the leading cost and project management systems. Our project controls philosophy is summarized by the following four points:

- Proper and early planning.
- Real-time monitoring and forecasting.
- Effective and timely communication of status and changes.
- Implementation of strict controls and actions to correct problems.

Our team will complete a review of the accounting system used by the District in order to integrate or transfer data to the project accounting and management system. We will then review all cost codes used by the District's accounting department and create a map to track costs by major cost buckets including design, construction, FF&E, project management cost, inspection and testing cost, and various other soft costs.

Cumming will establish project accounting and management systems by using industry standard software based on District's needs; develop master budgets for all bond projects broken down by major cost buckets; track expenditures by



**Our team works collaboratively and transparently with client stakeholders to deliver services that achieve our client's goals and objectives.**

major cost buckets and forecast additional anticipated cost by bucket to derive estimate at completion cost for each project; prepare anticipated cost reports for all projects and submit it to the District for their review; develop construction estimate based on SD, DD and CD drawings; validate that the design is within the budget; use construction estimate to update project overall budget (hard + soft costs) to show the District any potential savings/overruns, and prepare value engineering options for the District.

### **Project Schedule**

Our team believes in developing both a summary and a detailed schedule approach for time management control. Summary schedules, by design, inform and update senior management, while detailed construction schedules provide the day-to-day operational tools for time management.

### **Pre-Bid and Pre-Construction Meetings**

Our team will prepare pre-bid and pre-construction agendas and facilitate pre-bid conferences for each project. Contract Documents will be clarified, and bidder inquiries will be addressed at each meeting. Our job is to clearly communicate the work with bidders. All questions resulting from the pre-bid meeting will be recorded and responses will be distributed to bidders.

## **Bid Phase**

### **Methodology During Bid Phase**

Our proposed team members are fully trained in construction procurement. After the identification of bidders and release of the solicitation package, our team conducts project site visits and documents any questions or new data provided. If warranted, we amend the solicitation to include that new information. Our team maintains strict control of the information process during the pre-bid phase to avoid any confusion.

One area of focus is on the change order process. We have found that when contractors understand the fairness of the change order and payment process, they generally bid lower because they do not have to put as much management reserve in their bids. Our evaluation process includes an assessment of both the bid and the firm's ability to successfully perform the contract. Cumming staff are extremely proficient in performing or assisting in the evaluation of cost proposals and determining the most responsive and responsible bidder.

### **Safety is Always at the Forefront**

Through many years of working around occupied sites and on campus environments, we understand special care needs to be taken to ensure the safety of all parties. As part of the project kick-off meeting, we will work with you to create a site specific safety plan. We are very sensitive to working in and around an occupied facility.

## **Construction and Closeout Phase**

Typical concerns that must be addressed during construction include construction phasing, maintaining paths of travel around construction zones, scheduling of certain contractor activities that may impact the site, noise and dust control, vehicular access and parking, contractor staging areas, and coordination of utility shutdowns, if needed.

We will work diligently to keep you updated on progress and apprised of forecasted activities. Our team will become familiar with the general conditions and technical sections of the contract specifications and verify that the provisions of the contract are clearly understood and enforced during the construction phase. We will log and track project correspondence, project submittals, requests for information (RFIs) and other project documentation.

### **Construction Sequencing**

The effective sequencing and scheduling of construction work around existing facilities will begin in the design phase. Known conditions that may influence the contractor's schedule will be shared with the prospective bidders at the pre-bid walkthroughs and will be further clarified at the pre-construction meeting held with the successful low bidder.

Our team will closely review the contractor's schedule submittal to make certain that all required sequencing and milestones are shown. By closely monitoring the contractor's progress and work plan, we will be able to make recommendations as needed to adjust sequencing, work, or traffic patterns to minimize disruption to project activities.

### **Testing and Inspections**

During construction, Cumming will systematically verify that reviews, certifications, inspections and tests are



being performed. A good quality assurance plan includes documenting all inspections, identifying items that have been satisfactorily inspected and targeting those requiring corrective action. At the beginning of construction, each inspector will review the contract documents outlining the most important elements to include in the quality control data. From the database, we can develop quality control checklists to manage startup, acceptance, and closeout procedures with the all required inspectors. At weekly meetings, the contractor's completed activities will be discussed and their quality control effectiveness measures evaluated. Where improvements are needed, the contractors are advised to implement them in time for upcoming activities.

Comprehensive and accurate as-built drawings are essential to the successful closeout of construction projects. Cumming believes that regularly updated as-built drawings are achievable when they are required for each payment application. Our team will verify that each contractor keeps its as-built drawings up to date before approving their portion of the work for payment. Any modifications to the contract documents must be posted on eDocs before submittal of any payment requests.

#### Furniture, Fixtures, and Equipment

Our team can assist in FF&E procurement. If the owner chooses, we have the ability and resources to coordinate development of detailed needs, cost, purchases, installation, and move in of all furniture, fixtures and equipment. Using FF&E planning at the beginning of a project assures that the architect has provided space and power for unique equipment, requirements often found in educational classrooms. We bring a current knowledge of piggy-back purchase opportunities and preparation of bid packages for FF&E not available through piggy-back contracts.



#### Commissioning

Cumming will ensure that District maintenance staff receives both appropriate orientation and instruction on new equipment and fixtures and all necessary maintenance manuals. Commissioning proves that the building and its systems work as intended. To accomplish this, our team will conduct a series of field meetings with District maintenance representatives and equipment/fixture manufacturers' representatives to conduct field training and orientation.

#### Post-Construction

Our team can assist the architect, engineers, consultants, and all end users in developing project punch lists and verifying completion of all items. In cases where an existing facility is being remodeled, documentation of existing conditions must be performed prior to construction to confirm fairness to all parties and facilitate completion of the punch list work. If the project requires occupancy prior to completion of minor punch list items, we will coordinate with the contractor to complete the punch list work during times where activities will not be disrupted.

#### Quality Control/Assurance Procedures

We have a simple yet rigorous approach to obtaining and maintaining quality for our clients. The primary ingredients are teamwork and communication. Our approach is guided by the following principles:

- **Quality is conformance to requirements** — If you don't know the requirements, conforming to them is tough.
- **Maintain consistent quality throughout the process** — Requirements of each phase are set by the work products of preceding phase; thus poor quality work products limit the following phase.
- **Measure early and often** — Our work processes focus on quality assurance that our deliverables conform to the contract requirements. We have found that the potential for surprise is inversely proportional to the frequency of measurement. Therefore, we will check the progress and the quality of the work often and make small corrections to avoid large corrections.

One of the most important elements of the quality assurance and quality control tasks is team-building. This activity is part of a comprehensive assignment kickoff to develop a common understanding of the project's goals and objectives, develop clear lines of communications, and to clearly understand the scope of work to be accomplished. Once these issues are aligned in everyone's minds, a quality process can be implemented.

Our quality assurance is the continuous application of effective processes within a team environment to achieve conformance to project requirements. The most meaningful measure of quality is client satisfaction. We will assign a senior member of our team the responsibility of Quality Assurance officer and that individual will be responsible for ensuring quality on the projects associated with this solicitation.

Section

8



Knowledge and Understanding of  
Local Environment





## Section 8 Knowledge and Understanding of Local Environment

### Explain the knowledge and understanding of working in San Diego County.

Cumming is very knowledgeable with working with the County of San Diego, and the Cities that it encompasses. We are knowledgeable with local agencies regulations and policies, local environmental documentation requirements, geotechnical conditions in the project area, and local building codes and other technical criteria. A partial listing of our San Diego County experience:

Client	City
University of California, San Diego	La Jolla
Psychiatric Hospital of San Diego	San Diego
Navy Hospital	Camp Pendleton
Naval Medical Center	San Diego
Sharp Grossmont Hospital	La Mesa
San Ysidro Health	San Diego
Paradise Valley Hospital, National City	National City
VA San Diego Healthcare	San Diego
County of San Diego	San Diego
Alvarado Hospital Medical Center	San Diego
California State University, San Marcos	San Marcos
City of Del Mar	Del Mar
City of Vista	Vista
City of National City	National City
San Diego Community College District	San Diego
San Diego City College	San Diego
City of San Diego	San Diego
Scripps Hospital Encinitas	Encinitas
City of Carlsbad	Carlsbad
City of Poway	Poway
San Diego State University	San Diego
Navy Amphibious Base San Diego	San Diego
Port of San Diego	San Diego
Mira Costa College	Cardiff
Palomar College	San Marcos
San Diego International Airport	San Diego
Cuyamaca College	El Cajon
Sharp Chula Vista Medical Center	Chula Vista

Section

# 9



Fee Schedule



## Section 9 Fee Schedule

Provide a listing of the proposed personnel, their classifications, and their hourly rates, including all overhead and profit.

Cumming's fee philosophy for professional services is based on our understanding of the District's need for seasoned and qualified professionals at a sensible cost. We operate as an extension of the district's staff to ensure full transparency, collaboration, and that our team members offer the highest level of expertise to successfully accomplish any District task.

### HOURLY RATES

Cumming has provided hourly rates below to provide Construction Management Services for the Community Health and Wellness Center project. Our proposed hourly rates are inclusive of all overhead and profit.

Classification	Team Member	Hourly Rate
Sr. Project Manager	Daniel Silva	\$175

### AS-NEEDED SERVICES

Cumming is readily prepared to provide additional support staff and services on an as-needed basis, as well as a preventative measure to mitigate any unforeseen exposures that may impact project budget, schedule, and/or quality, if and as required by the District. As such, Cumming has provided hourly rates in the table below for additional as-needed support staff and services that are readily available to support the project, as necessary:

Classification	Team Member	Hourly Rate
Project Executive	Anthony Sanchez	\$185
Scheduler	Kunal Shah	\$155
Cost Estimator	Alan Campbell	\$175
Project Controls Manager	Brianna Quintanar	\$145
Constructability Review Manager	Michael Echelmeier	\$155

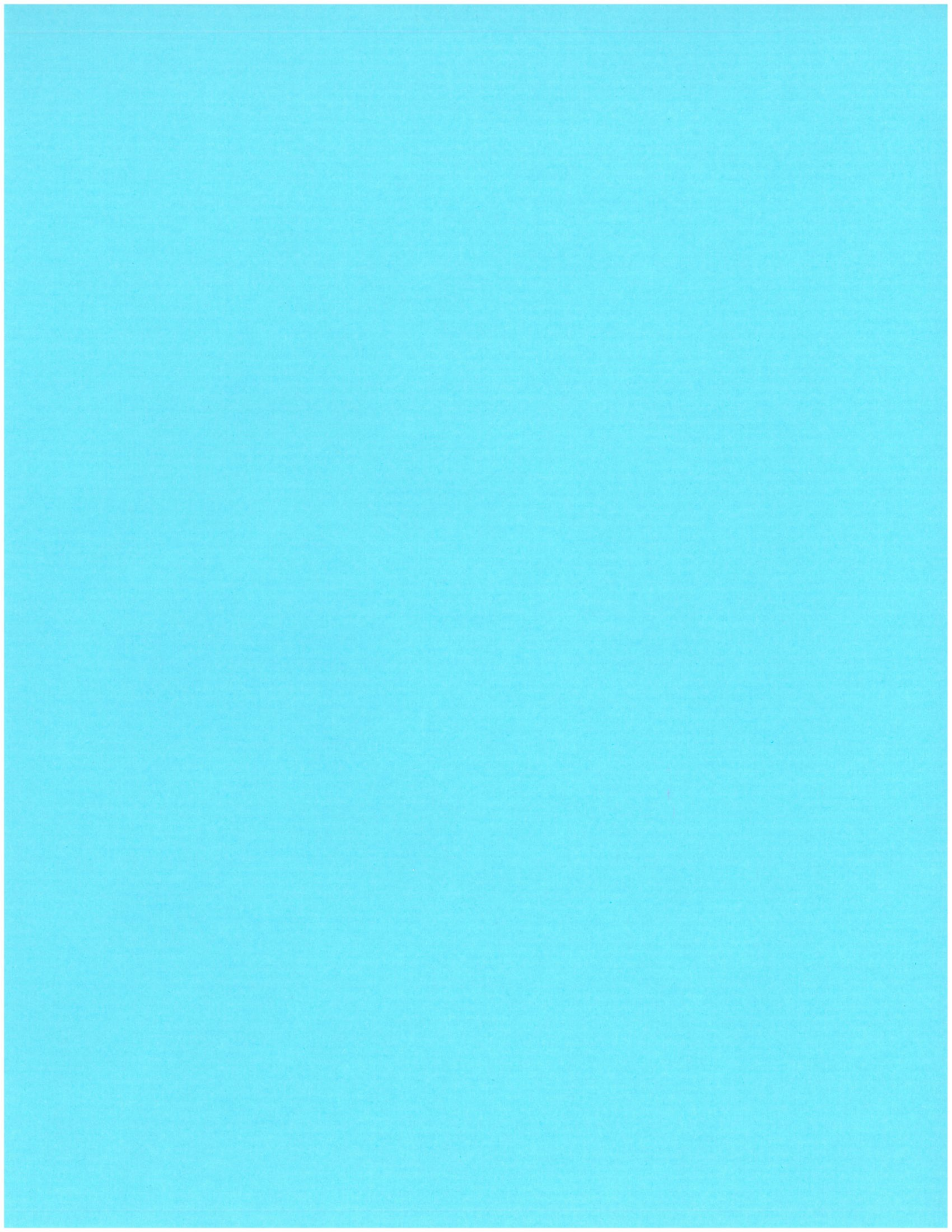
### REIMBURSABLE EXPENSES

Any reimbursable expenses incurred during Cumming's performance of services, including, without limitation, all costs for personnel, travel beyond twenty-five (25) miles of the District's geographic limits, per diem expenses, printing and/or shipping of deliverables will be billed at actual costs with 0% mark-up.

On-site facilities are generally provided by the District or part of the contractor's general conditions. If requested, these costs would fall under the reimbursable expenses category and shall be billed at cost with 0% markup. Client shall reimburse for any out-of-pocket expenses incurred which are authorized in advance and in writing.



**CUMMING**  
Building Value Through Expertise





ATLANTA CHICAGO DALLAS DENVER HARTFORD LOS ANGELES MIAMI NEW YORK OMAHA PHOENIX SAN DIEGO SEATTLE NATIONWIDE



**PROPOSAL FOR:**  
Construction Management Services

**PREPARED FOR:**  
Rachel Mason  
Chief Executive Officer  
Fallbrook Regional Health District  
138 South Brandon Road  
Fallbrook, California 92028

**PREPARED BY:**  
**Fulcrum**, a VERTEX Company  
2251 San Diego Avenue, Suite A-230  
San Diego, California 92210  
City of San Diego Business License No. B2021002116

**SEPTEMBER 16, 2022**



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September 16, 2022

Rachel Mason  
Chief Executive Officer  
**Fallbrook Regional Health District**  
138 South Brandon Road  
Fallbrook, California 92028

RE: Proposal for Construction Management Services  
Fallbrook Regional Health District: Community Health and Wellness Center

Dear Ms. Mason:

Attached for your review is **Fulcrum, LLC**, a VERTEX Company's (**Fulcrum**) proposal response to the Request for Proposal for Construction Management Services dated August 2022.

We would like to thank you in advance for both the opportunity to provide this proposal and the time extended to us on our August 31, 2022, site visit.

We look forward to continuing this process and look forward to any future interviews that we may schedule.

We trust this meets with your immediate requirements, and thank you for considering the services of **Fulcrum** on this important project.

Sincerely,

**Fulcrum LLC, a VERTEX Company**



Bradley W. Lancaster, CPC  
Senior Project Manager



JL Summerlin, CPC  
Assistant Vice President



## SECTION 1: EXECUTIVE SUMMARY

In response to the Request for Proposal for Construction Management Services dated August 2022 (the RFP), **Fulcrum**, LLC, a VERTEX Company (**Fulcrum**) is honored to provide this Proposal for the Community Health and Wellness Center for the Fallbrook Regional Health District in Fallbrook, California. We believe that this Proposal addresses all requests and submission requirements contained in the RFP and we trust that Fallbrook Regional Health District will find **Fulcrum** to be well-qualified to provide the proposed services.

We believe that **Fulcrum** brings to Fallbrook Regional Health District a unique opportunity – the opportunity to utilize **Fulcrum’s** local expertise and talent that is backed by a top Architecture, Engineering, and Construction (AEC) firm, VERTEX. We believe this unique combination will provide the project with a depth of multidisciplinary resources that will benefit the project, and position the project for a positive outcome.

**Fulcrum** is excited and honored to be considered for this opportunity and is ready to proceed upon execution of a suitable agreement and upon notice from Fallbrook Regional Health District to proceed.

## SECTION 2: FIRM INFORMATION AND EXPERIENCE

Since 2009, **Fulcrum** has provided clients with exceptional quality project services across North America. Since 1995, VERTEX has provided engineering, environmental, construction, and digital services to clients across the same footprint. The combined synergy of **Fulcrum** and VERTEX provides clients with an unparalleled platform of experience and multidisciplinary staff for a positive project-delivery experience.



### The Fulcrum Team

Established in 2009 and headquartered in Scottsdale, Arizona, **Fulcrum** is a full-service construction management and owner’s representation firm. **Fulcrum** is well-regarded for our exceptional quality and service across North America. As a multi-disciplined professional services firm, **Fulcrum** has active projects across North America, a platform of offices throughout the United States, and is laser focused on quality and value. **Fulcrum’s** staff includes construction, design, engineering, and accounting professionals providing the ability of **Fulcrum’s** 60 staff members to draw upon the collective experience and knowledge of the entire **Fulcrum** team.

### The VERTEX Team

VERTEX is an AEC firm that offers forensic, construction project advisory, engineering, environmental, and digital services throughout the globe. ENR currently ranks VERTEX as a top engineering design firm, construction/program management firm, and environmental firm. VERTEX is also ranked as a “Best Firm to Work For” by Zweig, which underscores VERTEX’S commitment to its employees. VERTEX’S blend of traditional engineering, environmental, construction, and digital services bolsters their ability to handle a multitude of design and construction assignments. VERTEX was founded in 1995 as a full-service construction and environmental services firm and currently has over 750 professionals with U.S. offices in Massachusetts, California, Colorado, Connecticut, Florida, Hawaii, Illinois, Kansas, Michigan, Missouri, New Jersey, New York, North Carolina, Pennsylvania, Texas, Washington, and Washington, D.C. VERTEX’S corporate headquarters is located in Weymouth, Massachusetts.

### Past Public Project Work

**Fulcrum**, and our parent-company VERTEX, has a demonstrated track-record of successful owner’s representation on public projects. Selected projects are as follows:

#### Police and Fire Stations - Randolph Massachusetts

Performed in 2014, VERTEX served as the Owner’s Project Manager for the renovation of the Randolph Police Station, which is connected to the Town Hall and was no longer adequate for the needs of the Town. The \$4.4MM renovation and addition added much needed office and storage space and brought the facility up to code. The project occurred in five phases due to the activity in the police station and the Town Hall. Phase 1 included the construction of the new addition and main entry to the police station, as well as a new cell area. The remaining phases consisted of code upgrades, interior renovations, and state of the art equipment and technology. VERTEX’s services included advising the Town on the selection of the architectural firm for the project, overseeing the work of the architect during the design process, attendance at public meetings, budget preparation and review, bid process oversight, and on-site supervision of construction activities, and

coordination with the on-duty officers and Town Hall employees.

VERTEX served as the Owner's Project Manager for the \$5.5MM construction of the new North Randolph Fire Station. The new fire station facility houses three apparatus bays, dispatch and communications, offices, and dormitory space for on-duty firefighters. The project also includes upgrades to an abutting dentist's office, which received a new entry way and landscaping upgrades. The project was responsible for the disconnection and reconnection of all utilities to keep the dentist's office fully operational throughout the duration of the project. VERTEX's services included advising the Town on the selection of the architectural firm for the project, overseeing the work of the architect during the design process, attendance at public meetings, budget preparation and review, bid process oversight, onsite supervision of construction activities including being the direct contact with the dentist's office for any issues throughout the course of the project, coordination of electrical service for both the fire station and the dentist office, gas service for the dentist office, coordination for removal and relocation of traffic lights and traffic control, as well as coordination with DPW and their work associated with the mentioned utilities.

#### Dracut Town Hall New Construction – Dracut, Massachusetts

Performed in 2012, VERTEX served as the Owner's Project Manager for the construction of the Town of Dracut's new 22,500 square foot town hall building. Phase One of the project consisted of the demolition of two single-family homes, site clearing, infrastructure to support the new structure, and the construction of the new building. Phase Two included the relocation of town offices into the new town hall building, reconstruction of a roadway running through the site, reconstruction of an existing parking lot, and landscaping.

Throughout the course of the project, VERTEX's services included budget creation and management, schedule management, records management, designer coordination, constructability review, value engineering, pre-bid conferences, onsite supervision of construction activities, change order review and negotiation, monthly reports, health and safety reviews, attendance at public meetings, punch list oversight, owner training sessions, and review of closeout documentation and warranties.

#### Chelmsford North and Center Town Halls – Chelmsford, Massachusetts

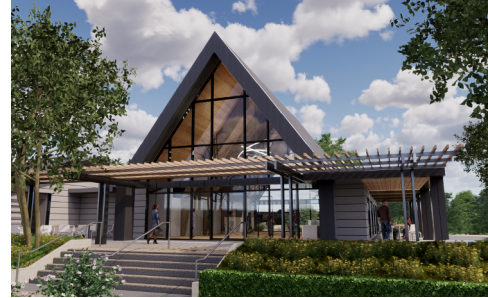
Performed in 2010 and 2011, VERTEX served as the Owner's Project Manager to the town of Chelmsford for the restoration of the North and Center Town hall buildings. The project involved the historical renovation of these two buildings as both were originally constructed in the 1800s. The first building, the Center Town Hall, was constructed in 1879 and currently serves as the Chelmsford Center for the Arts. The second building, the North Town Hall, was constructed in 1853 and now serves the community as after-school space for the middle-school students.

Restoration work included: structural, architectural, and mechanical components, as well as ADA upgrades to ensure accessibility throughout the buildings.

Please see Attachment B for a representative listing of **Fulcrum** projects.

### **SECTION 3: PROPOSED PROGRAM MANAGEMENT TEAM**

**Fulcrum** is pleased to provide a unique opportunity to Fallbrook Regional Health District – key local team members, experienced in both owner’s representation and project management in the San Diego area, leveraged and supported by the one of the premier full-service construction management and owner’s representation firms in North America (**Fulcrum**) and one of the premier AEC firms in North America (VERTEX).



#### **Key Team Members**

##### **Bradley W. Lancaster, CPC – Senior Project Manager**

With over 25 years of experience in the construction and real estate industry, Mr. Lancaster is a project management professional experienced working in fast-paced and high-pressure environments and has successfully performed in a wide range of roles, including owner representation and general construction.

Mr. Lancaster has managed logistical and capital expenditure programs in retail, health care, food service, sports facility, education, aviation, and office sectors. Mr. Lancaster is proficient in managing the entire development process, including site selection, due diligence, budgeting, construction cost management, design guidance, construction service procurement, construction oversight, and commissioning.

Mr. Lancaster has acted as an owner’s representative, responsible for the entire development process, for the following San Diego County projects:

- Comerica Bank – Vista
- Comerica Bank – Mira Mesa
- Comerica Bank – La Mesa

Mr. Lancaster is a fourth-generation Californian and has earned a Master’s in Business Administration and a Bachelor of Science in Construction from Arizona State University. Mr. Lancaster resides in San Diego and Mr. Lancaster’s resume is included in the Attachments section of this report.

##### **Will Ellis – Project Manager**

With over six years of experience, almost exclusively in the San Diego County area Mr. Ellis is an integral team member and has extensive experience delivering Construction Project Management Services, Plan and Cost Reviews, and Construction Draw Review Services.

Mr. Ellis has acted in a Project Manager capacity for the following San Diego County projects:

- Temecula Health Care
- Ballpark Village
- CedarStreet Park Boulevard Flats
- Gaylord Hotel and Convention Center

Mr. Ellis holds a Bachelor of Social and Behavioral Sciences degree in Resource Economics with a concentration in Managerial Economics from University of Massachusetts Amherst along with numerous Professional Certificates from San Diego State University. Mr. Ellis resides in San Diego and Mr. Ellis’ resume is included in the Attachments section of this report.

### **The Fulcrum Team**

Established in 2009 and headquartered in Scottsdale, Arizona, **Fulcrum** is a full-service construction management and owner’s representation firm. **Fulcrum** is well-regarded for their exceptional quality and service across North America. As a multi-disciplined professional services firm **Fulcrum** has active projects across North America, a platform of offices throughout the United States, and is laser focused on quality and value. **Fulcrum’s** staff includes construction, design, engineering, and accounting professionals providing the ability of **Fulcrum’s** 60 staff members to draw upon the collective experience and knowledge of the entire **Fulcrum** team.

### **The VERTEX Team**

VERTEX is an AEC firm that offers forensic, construction project advisory, engineering, environmental, and digital services throughout the globe. ENR currently ranks VERTEX as a top engineering design firm, construction/program management firm, and environmental firm. VERTEX is also ranked as a “Best Firm to Work For” by Zweig, which underscores VERTEX’S commitment to its employees. VERTEX’S blend of traditional engineering, environmental, construction, and digital services bolsters their ability to handle a multitude of design and construction assignments. VERTEX was founded in 1995 as a full-service construction and environmental services firm and currently has over 750, yet now over 800 including **Fulcrum**, professionals with U.S. offices in Massachusetts, California, Colorado, Connecticut, Florida, Hawaii, Illinois, Kansas, Michigan, Missouri, New Jersey, New York, North Carolina, Pennsylvania, Texas, Washington, and Washington, D.C. VERTEX’S corporate headquarters is located in Weymouth, Massachusetts.

## SECTION 4: PROJECT SPECIFIC EXPERIENCE

Representative project experience is important. Of equal importance are the skills developed and maintained in executing a wide variety of project types as an Owner's Construction Manager. While the combined public work experience of both **Fulcrum** and VERTEX is extensive, the selected projects below are only a snapshot of the combined public and private projects where **Fulcrum** and VERTEX have provided Owner's Construction Manager services.



### Relevant Public Project Experience

#### Medway Department of Public Works – Medway, Massachusetts

Completed in December of 2020, VERTEX/Compass served as Owner's Project Manager for the new Department of Public Works Building in Medway, Massachusetts. The new multi-building facility project includes a 33,000 SF office/vehicle storage building; a vehicle parking canopy; a salt shed and all related site work. The new office/vehicle storage building will include fit-outs for administrative office spaces, crew support spaces, including locker rooms, department workshop spaces, vehicle maintenance bays, a wash bay, and parking for the Department's front line vehicles.

- Role: Owner's Project Manager
- Dollar Value of Project: \$11 Million
- Staffing: Part-time
- Client Contact: Allison Potter, Assistant Town Manger, Medway DPS, 508-533-3264, apotter@townofmedway.org

#### Walpole Council on Aging – Walpole, Massachusetts

Completed in December of 2018, VERTEX/Compass served as Owner's Project Manager for the Town of Walpole for the new Walpole Council on Aging Building project. The new Walpole Council on Aging Building, to be known as the "South Street Center," was constructed on the Town's property at 50 South Street as part of the Town's efforts to re-develop the former industrial site. The Center shares the site with the Town's newly constructed Police Headquarters building and is on the southerly part of the site overlooking the Neponset River watershed. The new, multi-story, fully accessible, building is approximately 13,000 SF and offers a variety of spaces providing local seniors with services focused on socialization, nutrition, and fitness. The Center has a large multi-purpose room capable of holding a variety of functions including exercise classes, musical or speaking performances, and large group meals. The Center also houses administrative offices, information areas, fitness areas, social gathering spaces, and activity/classroom spaces.

- Role: Owner's Project Manager
- Dollar Value of Project: \$7.5 Million
- Staffing: Part-time
- Client Contact: Jim Johnson, Town Manager, 508-660-7304, jjohnson@walpole-ma.gov

#### Hanlon Deerfield Elementary School - Westwood, Massachusetts

Schedule for completion in February of 2025, VERTEX/Compass is serving as the Owner's Project Manager for the Town of Westwood. VERTEX/Compass managed the feasibility study for the Town's plan for its new elementary school to replace the existing Hanlon School and its consideration of consolidating two elementary schools into a single school. Currently, VERTEX/Compass is working with the Town of Westwood

on the new Hanlon Deerfield Elementary School. This new 560 student, \$88MM, 113,000 SF school will have modern education spaces and community amenities including a large gym and 11×7 soccer field for the Town. It will be a Net Zero Ready school with a project Energy Use Intensity of 22 KBtu/SF/yr. When completed, it will be one of the most energy efficient schools in Massachusetts. The project will have one of the best HVAC systems to address indoor air quality and will exceed the CDC standard for dealing with pandemic such as COVID.

- Role: Owner's Project Manager
- Dollar Value of Project: \$88 Million
- Staffing: Part-time
- Client Contact: John Cummings, Town Permanent Building Committee Chair, 781-326-7500

## **SECTION 5: PROPOSED METHODS TO ACCOMPLISH THE WORK**

As the Owner’s Construction Manager, **Fulcrum** will serve to represent the interests of the Client throughout all phases of the project. We seek to create a collaborative project team, where **Fulcrum** serves as the link between the Owner, Design Team, General Contractor, Subcontractors, consultants, and vendors or suppliers. **Fulcrum** and VERTEX bring over 35+ years of experience as a company to successfully manage the project and ensure the project goals are met.



It is **Fulcrum’s** understanding that the objective of this project is to provide oversight for all aspects of the project from schematic design through final closeout, including management of the design process, overall project schedule, procurement process general contractor selection, construction, etc. **Fulcrum** will work with the Client through every phase of the project to ensure successful completion of the work and contract conformance by qualified general contractors. Please see below for an overview of **Fulcrum’s** anticipated services throughout the project.

### **General Construction Management Services**

Pricing Verification: **Fulcrum** will work with the Client to review and confirm the feasibility of the overall project budget inclusive of all anticipated construction costs, soft costs (i.e. design services, project management, etc.) and contingencies. **Fulcrum** can also help develop an initial cash flow report that includes construction costs and incidentals. This information will be of value to the Client as they plan for payments throughout the project.

Schedule Development: **Fulcrum**, will facilitate and develop an overall project schedule with input from the Client, stakeholders, design team, and other project team members. The schedule will provide the project team the guidance for project deliverables and provide stakeholders with realistic delivery expectations.

Communication & Document Control Procedure: **Fulcrum** will develop a communication and document control procedure that will detail the responsibilities and lines of communication amongst the project team (i.e. Client, Design Team, Contractor, Subcontractors, consultants, and vendors or suppliers) and will establish the procedure for correspondence, document control, General Contractor Submittal Logs, Request for Information (“RFI”) Logs, Change Order and Potential Change Order Logs, and other tracking logs as needed. **Fulcrum** can create meeting agendas and attend/present as needed at all applicable project/stakeholder meetings that the Client deems necessary.

Project Records Management: Throughout all phases of the project, **Fulcrum** will maintain a detailed project record for the Client. This project record will typically include the following documents: executed agreements between the Client, Architect/Engineers and the General Contractor, copies of performance and payment bonds, a master list of permits, certificates of insurance, licenses and approvals for the project, daily reports, project schedules, all construction contract documents (i.e. plans and specifications), submittals, ASIs and shop drawings, correspondence with all parties, construction correspondences (including Requests for Information, Construction Change Directives, etc.), and financial information (including Payment Applications, Change Orders, Change Order Requests, and Proposal Requests). Furthermore, **Fulcrum’s** oversight of the document controls will result in the timely processing of time- sensitive documents such as



submittals and payment requisitions.

### **Design Phase Services**

During the design development phase of the project, **Fulcrum** will work to facilitate a constructive relationship between the Client and the Design Team. As the Construction Manager, **Fulcrum** will review the documents that are prepared and work with the Architect to make sure that the Client's needs and intent are incorporated into the overall design.

Constructability & Cost Estimate Review: If required, **Fulcrum** will conduct constructability reviews of Design Development Drawings before they are distributed to potential bidders for the project. The purpose of the constructability review is to try to identify immediate design issues, areas that exhibit potential for future defect/long-term issues, and areas of the design that could be the basis of a Change Order from the General Contractor so that they may be clarified and discussed.

Strategic Contracting: If required, **Fulcrum** will provide the Client recommendations regarding general contractor contract form and structure and also provide recommendations regarding the strategic use of alternates and allowances.

Value Engineering: Value Engineering for **Fulcrum** is a project-long activity that starts the day we receive preliminary plans to the day construction activities are complete. If requested, **Fulcrum's** Project Manager and the Designer can each spend time critically reviewing and discussing the plans with the Client in order to identify areas for potential cost savings and alternatives. Using RSMMeans estimating software, we can efficiently run alternative costs for the project.

Construction Document Production and Permitting: If required, **Fulcrum**, will monitor the production of Construction Documents, manage the timely submission to San Diego County and other jurisdictions having authority, review jurisdictional comments, and review jurisdictional resubmissions to ensure that the project avoids unnecessary review cycles.

### **Construction Phase Services**

"Time is of the Essence" is **Fulcrum's** approach in meeting an aggressive construction schedule. Not only will we strive to meet your objectives, we will make it a priority to improve upon the schedule and accelerate completion. Less time on-site results in additional cost savings to the Client. Our services during construction will include the following:

On-Site Project Representation: **Fulcrum** will provide the requisite on-site presence during the construction phase of this project, dependent upon the needs of the Client. **Fulcrum's** onsite Project Representative will monitor construction to ensure compliance with contract plans and specifications, monitor time and materials work, provide weekly logs and photographic documentation of the project, and maintain project record documentation. Depending on the amount of **Fulcrum's** presence/involvement onsite, the weekly log may include a record of weather, a summary of the General Contractor's work onsite, number of workers, worker sign-in sheets, visitors to the site, safety status of the project, equipment and equipment utilization, material and equipment deliveries, non-compliance with safety procedures and issuance of any safety violation notifications, accidents, general description of work performed and quality of work, visits of code enforcement officials and any resulting reports or orders, verbal instruction to interpretations given to the General Contractor, payment items, delays, deficiencies and field problems.

Project Meetings: **Fulcrum** will assist in coordinating pre-installation meetings prior to the commencement of major scheduled activities that require coordination between various disciplines. In order to keep the Client informed on project matters, **Fulcrum** will hold meetings, prepare agendas, provide updates of project

progress, answer questions and receive feedback. Additionally, **Fulcrum** will advise the Client on project budgeting, schedule, project cash flow, design input, and project scope issues. Furthermore, at these meetings, **Fulcrum** will provide the Client with monthly progress reports, updating the Client on any issues.

Payment Application Review: **Fulcrum** will review the General Contractor's monthly Payment Applications and make recommendations to the Client for payment. With our onsite presence, **Fulcrum** will ensure that the amounts requisitioned for are commensurate with the work completed to date, and that the Client's financial interests are protected. **Fulcrum** will also ensure that all required Conditional and Unconditional Lien Waivers are supplied by the General Contractor and Subcontractors with each Payment Application.

Schedule Review & Management Services: **Fulcrum** will provide Schedule Review and Management services during construction. Once the General Contractor provides a Critical Path Method ("CPM") Schedule for construction, **Fulcrum** will analyze the project schedule and relay any deviations to the Client. **Fulcrum** will work with the Design Team and General Contractor to help ensure adherence to the schedule by all parties. **Fulcrum** will also help to identify any potential long-lead items at the onset of the project to mitigate potential delays. **Fulcrum** and VERTEX have been repeatedly used to turn around and complete dozens of defaulted construction projects; this experience sets us apart from other firms as we have seen what can make a project become distressed and, as such, can often curtail issues that have doomed other projects.

Change Order Review & Negotiation: **Fulcrum** will review all Potential Change Orders on the Client's behalf and make recommendations based on material costs, material quantities, labor rates, and labor quantities. Change Order pricing may be analyzed using RSMeans and historical cost data to provide a fair and reasonable analysis. **Fulcrum** will initiate, conduct and document negotiations of Change Orders with the General Contractor, make recommendations to the Client for acceptance or rejection, and prepare and finalize any documentation required for the processing of Change Orders, including documentation to support or reject the change.

Construction Health & Safety: **Fulcrum's** approach towards safety and security typically emphasizes the safety procedures of general contractors and construction personnel on-site. We will monitor the General Contractor's safety programs, develop a logistics plan, and locate fences and barricades with the General Contractor to ensure the safety of the development residents and guests. We will review the General Contractors' work and be sure the contract documents are specific in their responsibility for a safe work environment. **Fulcrum** has the ability to consult on the general contractor's Health and Safety Program (HASp). Lack of proper oversight in the quality or safety at any stage of a project can be devastating. Aside from the obvious risk to public and worker safety, an accident can potentially delay project development and increase project costs.

Punch List: **Fulcrum** will participate in the creation of the project's final punch list, ensuring that all aspects of the project are completed satisfactorily before final payment is made to the General Contractor. **Fulcrum** will coordinate a walkthrough with the Client and the Design Team for review of the work in place. In conjunction with the Design Team, **Fulcrum** will prepare our own detailed punchlist. As the punchlist work is completed by the General Contractor, **Fulcrum** will assist the Design Team in reviewing completed work.

Closeout: After ensuring all punchlist work is signed off on by the Client and Design Team and all closeout documentation and training has been completed, **Fulcrum** will review all open change orders and credits to process all general contractor final payments, and ensure receipt and delivery of all lien releases, certified payroll (if applicable), labor compliance affidavits and financial closeout documentation. Having tracked project financials from the inception of the project, **Fulcrum** will be able to provide a complete summary of project expenditures.

## **SECTION 6: KNOWLEDGE AND UNDERSTANDING OF THE LOCAL ENVIRONMENT**

For over 10 years, **Fulcrum** has enjoyed the opportunity to work and live in San Diego County. During that span, **Fulcrum** has gained valuable insight into the San Diego market that **Fulcrum** is eager to apply to the project.



### **San Diego Residencies**

**Fulcrum** is proud to note that all proposed **Fulcrum** staff for the project are residents of San Diego. **Fulcrum** understands that residency is an important common thread in stakeholder, jurisdictional, and project delivery team interaction and is pleased to note that **Fulcrum** staff can share in this experience.

### **Fulcrum San Diego Presence**

Over 10 years ago, **Fulcrum** recognized the importance of a permanent footprint in San Diego. As a result, **Fulcrum** opened its first office in San Marcos. Understanding the importance of a San Diego presence, and furthering **Fulcrum's** commitment to the greater San Diego area, **Fulcrum** opened its Old Town office in 2021.

### **San Diego Civic and Industry Involvement**

Civic and industry group involvement and participation is important in San Diego, and **Fulcrum** is proud to note that **Fulcrum** and **Fulcrum** staff are active participants and members of the following civic and industry groups:

- NAIOP
- Urban Land Institute
- Point Loma Association

### **San Diego Jurisdictional Relationships**

**Fulcrum** recognizes that relationships with jurisdictions having authority is important. **Fulcrum** is proud to note that **Fulcrum** staff has developed, and maintains, solid relationships with staff in planning, building safety, engineering and fire prevention in many San Diego jurisdictions and with many utility providers.

### **San Diego General and Subcontractor Knowledge and Experience**

General contractor and subcontractor relationships are important to project success. As only a local presence can provide, **Fulcrum** staff has cultivated positive working relationships with many San Diego general contractors and subcontractors. **Fulcrum** is eager to leverage these relationships to position the project for positive outcomes during planning, pre-construction, and project execution.

### **North County Logistics**

**Fulcrum** understands some of the logistical challenges of working in North County. As such, **Fulcrum** is prepared to utilize **Fulcrum's** experience in delivering North County projects, to ensure the proper planning and attention are focused project delivery during both pre-construction and project execution.

**SECTION 7: FEE SCHEDULE**

**Fulcrum** is pleased to offer the following Fee Schedule for the project. **Fulcrum** notes that the listed fees are inclusive of all overhead and profit.

**Project Fee Schedule**



<u>Proposed Project Personnel and Title</u>	<u>Rate</u>
Bradley Lancaster, Senior Project Manager	\$230/hour
Will Ellis, Project Manager	\$210/hour
<u>Other <b>Fulcrum</b> Personnel and Title</u>	
CEO and Manager	\$315/hour
Chief Operating Officer	\$295/hour
Chief Financial Officer	\$285/hour
Director	\$275/hour
Associate Director	\$250/hour
Senior Project Manager	\$230/hour
Project Manager	\$210/hour
Assistant Project Manager	\$195/hour
Project Coordinator	\$165/hour
Administrative Assistant	\$135/hour

**ATTACHMENT A - RESUMES**



# BRAD LANCASTER, CPC |

## SENIOR PROJECT MANAGER

### ABOUT

With over 25 years of experience in the construction and real estate industry, Mr. Lancaster is a project management professional experienced working in fast-paced and high-pressure environments and has successfully performed in a wide range of roles, including owner representation and general construction.

Mr. Lancaster has managed logistical and capital expenditure programs in retail, health care, food service, sports facility, education, aviation, and office sectors. Brad is proficient in managing the entire development process, including site selection, due diligence, budgeting, construction cost management, design guidance, construction service procurement, construction oversight, and commissioning.

### EDUCATION

Master of Business Administration Arizona State University

Tempe, Arizona Bachelor of Science, Construction Arizona State University Tempe, Arizona

### PROFESSIONAL AFFILIATIONS

American Institute of Constructors  
Professional Member Certified Professional Constructor Registration: 4202 (CPC) Project Management Institute Member

### CONTACT

P: (619) 359-8873 (Ext. 305)  
C: (858) 242-6783  
E: [blancaster@fulcrumcompany.com](mailto:blancaster@fulcrumcompany.com)  
W: [www.fulcrumcompany.com](http://www.fulcrumcompany.com)

### PROJECTS

Gaylord Pacific | Chula Vista, CA  
Comerica Bank | Mira Mesa, CA  
Comerica Bank, Expansion Program Owner's Representation | Western U.S.  
Comerica Bank | Vista, CA  
2121 Wood | Oakland, CA  
Great Wolff Lodge | Scottsdale, AZ  
Hub II | Tucson, AZ  
Optima Kierland | Phoenix, AZ  
Optima Sonora Village | Scottsdale, AZ  
Sky Crossing | Phoenix, AZ  
The Plant | Chandler, AZ  
WEPII and WEPIII, Due Diligence | Nationwide

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### EXPERIENCE

- Owner's Representation on a wide variety of development, logistical, and capital expenditure programs.
  - Managed 5-year real estate capital expansion program for retail banking center client.
    - Over 20 banking centers in California and Arizona with aggregate expenditure in excess of \$40 Million.
    - Responsible for total project implementation including site selection, due diligence efforts, budgeting, design guidance and A/E service procurement, GC bid and selection, construction oversight, and commissioning.
- Successfully managed and delivered 90,000 SF multi-specialty health clinic within established \$20 Million budget.
- Successfully managed variety of logistical site closures and operational moves, often while maintaining operational status of end-users.
- Provides due diligence, preconstruction, construction monitoring, and construction project management consulting services.
  - Consulting services include Due Diligence Reviews, Plan and Cost Reviews, Impact and Permit Fee Studies, Property Condition Assessments, and Construction Draw Review Services for a wide variety of project types including multi-family, industrial, grocery, restaurant, sport facility, retail, medical and commercial uses.
  - Provides consulting services for over 50 projects to a client base that includes developers, debt and equity partners, and prospective purchasers.
- Development and construction experience includes multi-family, industrial, grocery, restaurant, sport facility, retail, medical, educational, office, ground-up, and tenant improvement projects.
- Prepares, monitors, and manages both program and project CPM schedules for projects.
- Develops, secures requisite approvals, monitors, and manages hard and soft cots budgets for all projects.
- Manages the development and execution of procurement bid packages as projects requires.
  - Inclusive of architect, engineer, prime contractor, and miscellaneous vendor scopes of work.
- Extensive experience in analyzing vendor bids/proposals for overall scope compliance and vendor comparison.
- Adept at managing governmental approval processes and entitlement issues including advocating client's interests in review boards and staff level negotiations.
- Directed LEED certification efforts on four projects, including three as primary LEED AP.



# WILL ELLIS |

## PROJECT MANAGER

### ABOUT

Mr. Ellis holds a Bachelor of Social and Behavioral Sciences degree in Resource Economics with a concentration in Managerial Economics from University of Massachusetts Amherst.

As a Project Manager at **Fulcrum**, Mr. Ellis contributes to critical risk management and quality control practices through on-site observations and review of project documentation during all stages of the construction life cycle including Fulcrum’s Plan and Cost Reviews, Construction Draw Review Services, and Construction Project Management Services.

### EDUCATION

BS, Resource Economics University of Massachusetts Amherst, Massachusetts

### PROFESSIONAL AFFILIATIONS

Chi Alpha Sigma—National College Athlete Honor Society  
Professional Certificate in Construction Estimating SDSU (San Diego, CA)  
Professional Certificate in Construction Practices SDSU (San Diego, CA)  
Professional Certificate in Project Management SDSU (San Diego, CA)

### CONTACT

P: (619) 452-1255 (Ext. 356)  
C: (619) 213-2008  
E: wellis@fulcrumcompany.com  
W: [www.fulcrumcompany.com](http://www.fulcrumcompany.com)

### PROJECTS

Ballpark Village | San Diego, CA  
Temecula Healthcare Center | Temecula, CA  
Revel Palm Desert | Palm Desert, CA  
Marymount Greenhills | Millbrae, CA  
Gateway at Millbrae Station | Millbrae, CA  
Gaylord Pacific Resort & Convention Center | Chula Vista, CA  
Wexler | Sacramento, CA  
Caesars Forum Convention Center | Las Vegas, CA

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Fulcrum is able to provide various services within the Real Estate & Construction Lifecycle.

### DUE DILIGENCE EXPERIENCE

- Entitlement Services
- Peer Review
- Property Condition Assessments

### PRECONSTRUCTION EXPERIENCE

- Master Planning
- Contractor Evaluation
- Plan & Cost Review
- Project Rehabilitation Review

### CONSTRUCTION EXPERIENCE

- Construction Draw Preparation
- Construction Project Management
- Construction Draw Review
- Renewable Energy Review
- Mid-Construction Review
- Cost-To-Complete
- Project Closeout
- 12-Month Warranty

### OPERATIONS EXPERIENCE

- Capital Needs Partnership

**ATTACHMENT B – FULCRUM REPRESENTATIVE PROJECTS**



## REPRESENTATIVE PROJECTS | ASSISTED LIVING/SENIOR HOUSING

**Alder Ridge Senior** | Redmond, WA

**All Seasons** | Oro Valley, AZ

**Avidor Omaha AA** | Omaha, NE

**Belmar Senior** | Lakewood, CO

**Brightview** | Shelton, CT

**Burr Ridge Senior Living** | Burr Ridge, IL

**Canyon Winds** | Mesa, AZ

**Clearwater Sonoma Hills** | Rohnert Park, CA

**CP at Lake Worth** | Lake Worth, FL

**Damonte Ranch** | Reno, NV

**Fairwood Senior Living** | Renton, WA

**Fall River** | Longmont, CO

**Generations Pinnacle Peak** | Scottsdale, AZ

**Hacienda Sisters** | Tucson, AZ

**Harborchase of Germantown** | Cordova, TN

**Harborchase of Germantown** | Memphis, TN

**Heartis Fayetteville** | Fayetteville, GA

**Hembree & Shiloh Senior** | Windsor, CA

**Holbrook of Decatur** | Decatur, GA

**Homestead at Hamilton** | Hamilton, NJ

**Inspired Living** | Sugarland, TX

**Iron Point Senior** | Folsom, CA

**Issaquah Gateway Senior** | Issaquah, WA

**Jefferson Hills** | Roanoke, VA

**Jenkins Creek Senior** | Covington, WA

**Lark at Kent** | Kent, WA

**Memory Care facility** | Lakewood, CO

**Miller Avenue Senior Housing** | San Mateo, CA

**Morningstar** | Arvada, CO

**Mountain Park Senior Living** | Phoenix, AZ

**Palm Desert Senior** | Palm Desert, CA

**Park Meadows Memory Care** | Overland Park, KS

**Pima & Legacy** | Scottsdale, AZ

**Rancherrah Senior Living** | Reno, NV

**Sansom Pointe Senior** | Sansom Park, TX

**Stanford Ranch Congregate Care** | Rocklin, CA

**StoryPoint Grove** | Grove City, OH

**Temecula Medical Center** | Temecula, CA

**The Enclave at Chandler** | Chandler, AZ

**The Lodge at Glen Cove** | Vallejo, California

**The Palms at San Lauren** | Bakersfield, CA

**The Villages at Fiskville** | Austin, TX

**The Westmont at Short Pump** | Glen Allen, VA

**Tribute at Black Hill** | Germantown, MD

**Tropicana Senior Living** | Las Vegas, NV

**Tukwila South** | Tukwila, WA

**Veranda Club** | Boca Raton, FL

**Vernal Gardens Aged Care Facility** | Vernal, UT

**Vintage at the Crossings** | Reno, NV

**Watermark Hacienda** | Tucson, AZ

## **REPRESENTATIVE PROJECTS | COMMERCIAL OFFICES/INDUSTRIAL**

**40 Cross Street** | Norwalk, CT  
**5201 Tollview** | Rolling Meadows, IL  
**610 Wilshire Boulevard** | Los Angeles, CA  
**Amazon V,VI,VIII** | Seattle, WA  
**AT&T Tower** | Minneapolis, MN  
**Burbank Empire Center** | Burbank, CA  
**Camelback Esplanade II, IV, V** | Phoenix, AZ  
**Champion of the West Tower** | San Diego, CA  
**Collier Center** | Phoenix, AZ  
**ConAgra Foods Headquarters** | Greeley, CO  
**Dulles Tech Center** | Sterling, VA  
**Fifth+Columbia** | Seattle, WA  
**Finova Building at Portales** | Scottsdale, AZ  
**Genesee Executive Plaza** | San Diego, CA  
**JBG/Foundry Office** | Washington, DC  
**Lafayette Corporate Campus** | Lafayette, CO  
**Lake Park Corporate Center** | West Valley City, UT  
**Lincoln Square II** | Bellevue, WA  
**Mach One Office Building** | Chandler, AZ  
**Opus Gateway at Prairie Glen** | Glenview, IL  
**Pacific Rim Science Park** | San Jose, CA  
**Phelps Dodge Tower** | Phoenix, AZ  
**Plaza of the Rockies** | Colorado Springs, CO  
**Raytheon Corporate Center** | Aurora, CO  
**Torrey Hills Corporate Center** | San Diego, CA  
**West Union Village** | Hillsboro, OR

**Airport Tech Center** | Los Angeles, CA  
**Alexandria Technical Center** | San Francisco, CA  
**Aviall Building One Expansion** | Dallas, TX  
**C-Tech Building** | Paris, TX  
**Centennial Airport Center** | Englewood, CO  
**Cornerstone Marion** | Marion, IN  
**Cotton Corporate Center** | Phoenix, AZ  
**Des Moines Business Park** | Des Moines, WA  
**Esselte Manufacturing Plant** | Tijuana, Baja CA, MX  
**Extra Space at Hoboken** | Hoboken, NJ  
**FedEx Distribution Center** | Glenwood Springs, CO  
**FedEx Headquarters** | Plano, TX  
**Forsythe Data Center** | Elk Grove Village, IL  
**Hillwood Industrial (Amazon)** | San Bernardino, CA  
**Jones Corporate Park** | Las Vegas, NV  
**Liberty Mutual Headquarters** | Plano, TX  
**Lone Peak Industrial Park** | Draper City, T  
**Manassas Data Center** | Manassas, VA  
**Nave Industrial Powerware II** | Tijuana, Baja CA, MX  
**PDX Logistics Center** | Portland, OR  
**Phoenix Industrial Building** | Phoenix, AZ  
**PowderMill Business Center** | Everett, WA  
**Rancho Vista Business Park Phase V** | Vista, CA  
**Raytheon Headquarters** | Richardson, TX  
**Tesla Building** | Tempe, AZ  
**Walker Supply Company** | Walker, TN

## **REPRESENTATIVE PROJECTS | HOSPITALITY/RETAIL**

Arizona Biltmore Golf Resort | Phoenix, AZ  
Agua Caliente Hotel/Spa | Palm Springs, CA  
Bicycle Club Casino Hotel | Bell Gardens, CA  
Cambria Suites | San Antonio, TX  
Cimarron Golf Resort | Cathedral City, CA  
Courtyard by Marriott | Everett, WA  
Doubletree Hotel | Sacramento, CA  
Embassy Suites Denver Airport | Denver, CO  
Evanston Hyatt | Evanston, IL  
Fairfield Hotel | Austin, TX  
Four Seasons Jackson Hole | Jackson Hole, WY  
Four Seasons Resort Residence | Punta Mita, MX  
Gold Canyon Ranch Resort | Gold Canyon, AZ  
Hampton Inn & Suites | Dewitt, NY  
Holiday Inn Express | Baton Rouge, LA  
Homewood Suites | Katy, Texas  
Hotel La Habana | San Felipe, Baja, CA, MX  
Hyatt Scottsdale Resort & Spa | Scottsdale, AZ  
Hyatt House | Naples, FL  
Hyatt Regency Lake Las Vegas | Henderson, NV  
Ritz Carlton | Henderson, NV  
Staybridge Suites | Glendale, CO  
Strand Hilton | Myrtle Beach, SC  
The Foundre Hotel | Phoenix, AZ  
The Quad Tower Remodel | Las Vegas, NV  
Towne Place Suites | Billings, MT  
Atascadero 101 Associates | Atascadero, CA  
Arrowhead Marketplace | Peoria, AZ  
Camelback Arboleda | Phoenix, AZ  
Chandler Boulevard Shops | Chandler, AZ  
Chino Spectrum Marketplace II | Chino, CA  
CompUSA | Frisco, TX  
Costco Site Preparation | Oceanview, NY  
Creekside Town Center | Roseville, CA  
Desert Ridge Marketplace | Phoenix, AZ  
Edinger Plaza | Huntington Beach, CA  
Flying Horse Retail | Colorado Springs, CO  
Gateway Pavilions | Avondale, AZ  
Grand Lakes (Cinco at Fry Road) | Katy, TX  
Highpoint Marketplace | Aurora, CO  
La Cholla Plaza | Tucson, AZ  
Mid-Town Crossing | Los Angeles, CA  
Multiple Shopping Malls | Mexico City, MX  
Old Ranch Town Center | Seal Beach, CA  
Oro Valley Marketplace | Oro Valley, AZ  
Pacific Plaza | San Clemente, CA  
Talega Village | San Clemente, CA  
Town and Country Phase II | Phoenix, AZ  
Vernola Marketplace | San Clemente, CA  
Walgreens 2013 | Anchorage, AK  
Whole Foods | University Place, WA  
Winchester Square | Temecula, CA

## **REPRESENTATIVE PROJECTS | SPECIALTY/SINGLE-FAMILY**

**Apple Athletic Club** | Idaho Falls, ID

**Arapahoe Gastroenterology** | Littleton, CO

**Coral Mountain** | La Quinta, CA

**Dodge Theatre** | Phoenix, AZ

**Fifth+Columbia** | Seattle, WA

**Fire Rock Navajo Casino** | Gallup, NM

**Gateway Chevrolet** | Avondale, AZ

**GL Foods** | San Bernardino, CA

**Glenn Jones Ford** | Casa Grande, AZ

**Golden State YMCA** | San Francisco, CA

**Holyoke Medical Center** | Holyoke, MA

**Homestead at Hamilton** | Hamilton, NJ

**Huffines Kia** | McKinney, TX

**LA Fitness at Peoria Station** | Peoria, AZ

**Lake Roosevelt Marina** | Roosevelt, AZ

**Landmark Golf** | Riverside, CA

**Lee Hughes Medical Building** | Burbank, CA

**Liberty Buick** | Peoria, AZ

**Lincoln Square II** | Bellevue, WA

**Retreat at Church Ranch** | Westminster, CO

**The Hub on Campus II** | Tucson, AZ

**Union Village** | Henderson, Nevada

**Vernal Gardens Aged Care Facility** | Vernal, Utah

**The Linq** | Las Vegas, NV

**Amberly Lane** | Mesa, AZ

**Bisontown Resort Cabins III** | Overgaard, AZ

**Bridle Creek** | Riverside, CA

**Cambria III** | Pinal County, AZ

**Creekside Village** | Spring, TX

**Cordova Estates** | Tolleson, AZ

**Fieldstone Estates** | Maricopa County, AZ

**Greenfield Lakes** | Gilbert, AZ

**Hidden Trails** | Escondido, CA

**Lyon Monterey** | Rancho Santa Margarita, CA

**Oak Ridge Meadows** | Taylor Lake Village, TX

**Olive Hills Court** | Houston, TX

**Residences at Four Seasons** | Scottsdale, AZ

**Robson Ranch** | Denton, TX

**Royal Oaks Court** | Houston, TX

**Sonoran Crest** | Scottsdale, AZ

**Springfield Road** | Elizabethtown, KY

**St. Cloud** | Oceanside, CA

**Sunrise Meadows** | Fort Bend County, TX

**The Bridges at Ocotillo** | Chandler, AZ

**The Terrace at Memorial City** | Houston, TX

**Twin Arrows Navajo Casino & Resort** | Flagstaff, AZ

## **REPRESENTATIVE PROJECTS | MULTI-FAMILY/MASTER-PLANNED**

**1500 Figueroa Apartments** | Los Angeles, CA

**17-33 Winter Street** | Boston, MA

**250 Piedmont (The Office)** | Atlanta, GA

**850 Lakeshore** | Chicago, IL

**2nd & Pike Tower** | Seattle, WA

**Alamo Manhattan Bellevue** | Bellevue, WA

**ALTA Tempe** | Tempe, AZ

**Bella Terra** | Allen, TX

**Bridgeport Apartments** | Tualatin, OR

**Broadstone Arts District** | Phoenix, AZ

**Cooper River Farms** | Charleston, SC

**Copper Creek Apartments** | Colorado Springs, CO

**Front Street Lofts** | Hartford, CT

**Gables Oglethorpe** | Brookhaven, GA

**Harrison Apartments** | Corvallis, OR

**Highlands Timeshare** | Highlands, NC

**Iron Bridge Road Apartments** | Chesterfield, VA

**Keller Springs Crossing** | Dallas, TX

**Las Villas De Paseo Nuevo** | Camarillo, CA

**Lake Street Lofts** | Chicago, IL

**Laurel Town Center Apartments** | Linthicum, MD

**Oceano at Warner Center** | Los Angeles, CA

**Optima Kierland Buildings I & IV** | Scottsdale, AZ

**Orchard Station** | Greenwood Village, CO

**Wardman West** | Washington, DC

**Bel Air** | Irvine, CA

**Bridges at Preston Crossings** | Gunter, TX

**Contrada Hills** | Pace, FL

**Cresta Verde** | Corona, CA

**Estrella Mountain Ranch** | Goodyear, AZ

**Legend Trails** | Cave Creek, AZ

**Milestone Potranco** | San Antonio, TX

**Mountain House** | San Joaquin County, CA

**Quechee Lakes** | Quechee, VT

**Randall Highlands** | North Aurora, IL

**RiverRim** | Bend, OR

**Robson Communities** | AZ & TX

**Russell 150** | Winchester, VA

**Sanctuary River Club** | Waverly, GA

**Savannah River Landing** | Savannah, GA

**Serrano Heights** | Orange, CA

**Sienna at Summerlin** | Las Vegas, NV

**Sweetwater Ranch** | Austin, TX

**Talking Rock Ranch** | Prescott Valley, AZ

**Terrabrook Escavera** | Castle Rock, CO

**Terrabrook Stonehaven** | Scottsdale, AZ

**Verrado** | Buckeye, AZ

**Vistancia** | Peoria, AZ

## **REPRESENTATIVE PROJECTS | TAX-CREDIT/MIXED USE**

**13 West Apartments** | Vancouver, WA

**Aspinwall** | Lafayette, CO

**Bradley Studios** | Santa Barbara, CA

**Cedarview** | Malta, MT

**Charles Place Apartments** | Providence, RI

**Circle Creek Apartments** | Homestead, FL

**Collins Park** | Miami, FL

**Crestview Village** | LaVista, NE

**D.H.C. II** | Denver, CO

**Evernia Place Apartments** | West Palm Beach, FL

**Fountains at Palmdale** | Palmdale, CA

**Goldbeck Towers** | Hastings, NE

**Hampton Village Apartments** | Miami, FL

**Inwood Crossings** | Wichita, KS

**Isabella Court** | Vancouver, WA

**Larkspur Commons** | Bozeman, MT

**Linda Vista Apartments** | Los Angeles, CA

**Livingston School Apartments** | Albany, NY

**Park Place at Loyola** | Austin, TX

**Promenade** | Auburn, WA

**The Imperial Building** | Albuquerque, NM

**Timbercreek Apartments** | Omaha, NE

**Village at Westerly Creek** | Aurora, CO

**Western Manor** | Lincoln, NE

**Wright Brothers Apartments** | Palmdale, CA

**2nd & Pike Tower** | Seattle, WA

**76 Eleventh Avenue** | New York, NY

**Artisan Court** | Santa Barbara, CA

**Aspen Place at the Sawmill** | Flagstaff, AZ

**The Beauvallon** | Denver, CO

**Brickyard on Mill** | Tempe, AZ

**Catalyst** | Chicago, IL

**Centerpoint** | Tempe, AZ

**Depot Plaza** | Tucson, AZ

**Estrella Del Mercado** | San Diego, CA

**Fifth+Columbia** | Seattle, WA

**Fountain & La Brea Apt.** | West Hollywood, CA

**Gregory Lofts** | Portland, OR

**Grigio Metro** | Tempe, AZ

**Gunbarrel** | Boulder, CO

**Lincoln Square II** | Bellevue, WA

**Northgate at the Gateway Ctr.** | Salt Lake City, UT

**Paraiso Del Mar** | La Paz, MX

**Plaza Point** | Arcata, CA

**Skyhouse** | Denver, CO

**TCR Union Market** | Washington, DC

**Wall Street Place** | Norwalk, CT

**Windsor Century Plaza** | Phoenix, AZ

**Younkers Building** | Des Moines, IO

**ATTACHMENT C – CERTIFICATE OF INSURANCE**



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
07/21/2022

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

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

PRODUCER Construction Risk Partners  Campus View Plaza 1250 Route 28, Suite 201 Branchburg, NJ 08876	1-908-566-1010	CONTACT NAME: Vien Nguyen PHONE (A/C No. Ext): 908-566-1010 E-MAIL ADDRESS: certs@constructionriskpartners.com	FAX (A/C No): 908-566-1020
INSURED Fulcrum, LLC  7373 E Doubletree Ranch Rd B-150 Scottsdale, AZ 85258		INSURER(S) AFFORDING COVERAGE	
		INSURER A: STEADFAST INS CO	NAIC # 26387
		INSURER B: ZURICH AMER INS CO	16535
		INSURER C:	
		INSURER D:	
		INSURER E:	
		INSURER F:	

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

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY  <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC  OTHER:			GPL 0187223-06	11/01/21	11/01/22	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000 \$
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY  <input checked="" type="checkbox"/> ANY AUTO  <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			BAP 0187219-06	11/01/21	11/01/22	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE  DED RETENTION \$			SXS 0187224-06	11/01/21	11/01/22	EACH OCCURRENCE \$ 4,000,000 AGGREGATE \$ 4,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input checked="" type="checkbox"/> N	N/A	WC 0187222-06	11/01/21	11/01/22	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Pollution Liability			GPL 0187223-06	11/01/21	11/01/22	OCC/AGG 2M/4M
A	Professional Liability			GPL 0187223-06	11/01/21	11/01/22	OCC/AGG 2M/4M

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

SAMPLE; Request complete Acord 25 upon execution of contract.

**CERTIFICATE HOLDER****CANCELLATION**

SAMPLE; Request complete Acord 25 upon execution of contract.

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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ACORD 25 (2016/03)

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Nhuddy  
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