NEWPORT-MESA UNIFIED SCHOOL DISTRICT

Statement of Qualifications for PBK-WLC for Architectural Services - RFQ #107-22

October 15, 2021
October 15, 2021

Re: RESPONSE TO RFQ #107-22, ARCHITECTURAL SERVICES

Dear Mr. Geiszler and Selection Committee:

We are excited to share our Statement of Qualifications with Newport-Mesa Unified School District to assist you with architectural services. As of October 2020, PBK Architects and WLC Architects (PBK-WLC) have partnered to bring over 85 years of combined educational services in California. Through our newly found partnership, our team will work relentlessly to support your vision of being “the model of education excellence and innovation.” With over 550 professionals across 18 office locations, we embrace a truly unique business culture which prioritizes customer service and transforms our educational clients’ needs and visions into groundbreaking architecture, resulting in functional and inspirational environments for generations to come. We now have nine office locations in California with 250 team members including architects, designers, MEP engineers, safety and security, and building envelope specialists.

Team members for Newport-Mesa USD projects will be provided from our Costa Mesa office, located approximately two miles from your district office, with a team ready to serve you immediately! We have completed over 300 projects in Southern California for our local school districts in the last five years including Harvest Hill STEAM Academy, Whitney High School Additions and Modernizations, and Dr. Ralph H. Baker 21st Century Learning Center, to name a few.

Our Team, PBK-WLC, understands that our success is determined solely by our clients and it’s for this reason that we are proposing a hand-picked team of highly qualified, local architectural and engineering professionals who have experience working on various K-12 projects across Southern California. Our team will be led by Bruce Ou as Principal-In-Charge, Marco Eacrett as Partner and Program Specialist, Jose Vallarta as Senior Project Manager, Kathleen Gillette as Project Architect, James Gonzales as Job Captain and Lance Hinkle as Project Coordinator. Our team also includes Rex Wang, Director with LEAF Engineers and an MEP expert who has worked on three past projects in your District. Incomparable customer service is a hallmark of PBK-WLC and that is what you’ll receive from our team, every step of the way.

About PBK-WLC. For over 40 years, PBK-WLC has completed thousands of projects in every size and scope. We have established a position as the recognized national leader in pioneering design applications that maximize safety and security for school facility occupancy, sustainability for conservation of energy and natural resources, and designing learning environments to meet educational requirements. With our experience in California school modernizations and new facilities, we understand the building requirements and process to help successfully see your project through to move-in.
Our team operates on a die-hard “can-do” business philosophy that emphasizes PBK-WLC’s soul — we go above and beyond the call of duty to ensure our clients get the best possible service in the industry — or as we say, “incomparable service.”

**DSA and Local Agency Experience.** Collectively, our team has successfully completed hundreds of DSA education projects within Orange County. We possess a comprehensive understanding of local conditions, codes, and environmental issues that play an important role in K-12 school facilities in the region. We will guide you through the funding and documentation process which includes working with OPSC and CDE, as well as DSA.

We look forward to further discussing why we believe our team would make a valuable extension of the District’s team. As the District’s main point of contact, feel free to contact me anytime at bou@pbk-wlc.com or via phone at (949) 548-5000.

Respectfully,

Bruce Ou, AIA, NCARB, LEED AP
Principal-In-Charge
email: bou@pbk-wlc.com
Acknowledgement of Receipt of Addenda

ADDENDA RECEIVED

Our team acknowledges the request for qualifications issued September 17, 2021 and all addenda issued thereafter from September 20 to October 1st 2021.

Bruce Ou, Principal-In-Charge

[Signature] 10/15/2021

Signature  Date
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A Business Profile

Firm History
As of October 2020, PBK Architects merged with WLC Architects to form PBK-WLC, making us the #1 K-12 architecture firm in the nation. This union has been in process over several years to provide a seamless transition of leading customer service to our many valued clients. Our high level of quality, integrity, attention to detail, and local presence will remain the same, while our availability of resources has now tripled – with 18 offices nationwide, home to over 550 employees and 250 here in California – we are ready to assist you with any and all of your future and immediate needs.

PBK-WLC’S #1 MARKET SECTOR IS EDUCATIONAL PLANNING AND DESIGN. WE HAVE BEEN ASSISTING SCHOOL DISTRICTS FOR OVER 45 YEARS.

Legal Form
S Corporation

Number of Years in Business
45 years

Home Office
8163 Rochester Avenue, Suite 100
Rancho Cucamonga, CA 91730
(909) 987-0909

Local Office
600 Anton Blvd, Suite 1375
Costa Mesa, CA 92626
(949) 548-5000

Types of Business Conducted
- K-12 educational planning and design
- Higher educational facility planning and design
- Government and Municipality
- Healthcare
iii. Provide the qualifications of recent [within the past ten years] and relevant experience of staff to be assigned to District projects, including resumes. Identify names of senior members and length of time in firm.

For over four decades, PBK-WLC has served K-12 and Higher Education school districts throughout California. Our Costa Mesa office is located just 2 miles from the Newport-Mesa Unified School District office and campus sites. This makes it seamless to communicate and work together with the District. We are both client-focused and passion-driven and our primary goal has always been to transform our client’s needs and visions into groundbreaking architecture, resulting in functional and inspirational instructional environments.

PBK-WLC has become an internationally recognized leader in architectural and engineering design solutions. We have provided professional planning and design services for hundreds of educational clients and have established a strong reputation for our unique approach to performance-based design and responsive customer service.

We effectively facilitate a collaborative, consensus-generating design process that produces customized, purpose-specific building environments that enhance end-user performance, and maintains strict control of the client’s budget and schedule objectives.

<table>
<thead>
<tr>
<th>CALIFORNIA PARTNERS</th>
<th>YEARS WITH FIRM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dan Boggio, AIA, LEED AP</td>
<td>40</td>
</tr>
<tr>
<td>Roy Montalbano</td>
<td>29</td>
</tr>
<tr>
<td>Marco Eacrett, AIA, LEED AP</td>
<td>5</td>
</tr>
<tr>
<td>Jim DiCamillo, AIA, LEED AP</td>
<td>38</td>
</tr>
<tr>
<td>Gary Gery, AIA</td>
<td>5</td>
</tr>
<tr>
<td>Kelley Needham, AIA</td>
<td>35</td>
</tr>
<tr>
<td>Kevin MacQuarrie, AIA</td>
<td>32</td>
</tr>
<tr>
<td>Max Medina, AIA</td>
<td>36</td>
</tr>
<tr>
<td>Bob Lavey, AIA</td>
<td>36</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NEWPORT-MESA USD DISTRICT TEAM</th>
<th>YEARS OF EXPERIENCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bruce Ou, AIA, LEED AP, Principal-In-Charge*</td>
<td>19</td>
</tr>
<tr>
<td>Marco Eacrett, AIA, Program Specialist</td>
<td>25+</td>
</tr>
<tr>
<td>Jose Vallarta, Senior Project Manager</td>
<td>24</td>
</tr>
<tr>
<td>Kathleen Gillette, AIA, Project Architect</td>
<td>6.5</td>
</tr>
<tr>
<td>James Gonzales, Job Captain</td>
<td>8</td>
</tr>
<tr>
<td>Lance Hinkle, Project Coordinator</td>
<td>3.5</td>
</tr>
</tbody>
</table>

LEVERAGING TECHNOLOGY TO KEEP YOUR PROJECTS ON SCHEDULE

The “new norm” has given our teams the ability to use the communication skills they’ve been honing to lead meetings virtually. In recent weeks, even our design teams have had the opportunity to successfully lead design charrettes using tools like Zoom, Microsoft Teams, or Google Meet. We are working with each client individually to customize a project approach that helps them succeed.
Attachment B

CERTIFICATION – REQUEST FOR QUALIFICATIONS

I certify that I have read and received a complete set of documents regarding the attached Request for Qualifications (RFQ) # 107-22 – ARCHITECTURAL SERVICES and the instructions for submitting an RFQ. I further certify that I must submit three (3) proposal copies, plus a complete copy on flash drive, of the firm’s Proposal in response to this request and that I am authorized to commit the firm to the proposal submitted.

Signature
Principal-In-Charge

Title
600 Anton Blvd, Suite 1375
Costa Mesa, CA 92626

Address
[949] 548-5000

Telephone
10/15/2021

Date

Typed or Printed Name
PBK-WLC

Company
8163 Rochester Avenue, Suite 100
Rancho Cucamonga, CA 91730

Address
[909] 980-9980

Fax

If you are bidding as a corporation, please provide your corporate seal here:
**Attachment C**

**STATEMENT OF EXPERIENCE AND FINANCIAL CONDITION**

Company Name: **PBK-WLC**

(Check One):  
- X Corporation  
-   Partnership  
-   Sole Proprietorship  

Address:  
8163 Rochester Avenue, Suite 100  
Rancho Cucamonga, CA 91730

Telephone/FAX#:  
[909] 987-0909 / [909] 980-9980

Date and State of Formation/Incorporation:  
1974 / California

Is the company authorized to do business in California?  
Yes

Basis of Authorization:  
- X California Corporation  
-   California Business License  
-   California Engineering License  
-   Other (specify)  

Identify the California office to be used for this contract if organization is located/headquartered outside of California:  
Address:  
600 Anton Blvd, Suite 1375  
Costa Mesa, CA 92626

**FINANCIAL INFORMATION**

State the company’s California and total revenues for 2017, 2018, 2019:

<table>
<thead>
<tr>
<th></th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>California:</td>
<td>$11,315,474</td>
<td>$18,938,840</td>
<td>$19,235,693</td>
</tr>
<tr>
<td>Total:</td>
<td>$80,403,938</td>
<td>$82,881,128</td>
<td>$110,820,047</td>
</tr>
</tbody>
</table>

Identify the largest project, in dollars, which your company has initiated or completed within the past five (5) years:

Katy ISD, Texas $173,064,088
Attachment D

QUESTIONS OF SUBMITTER

1. Is the company or its owners connected with other companies as a subsidiary, parent, affiliate, or holding company?  X Yes  No If yes, explain on a separate, signed sheet.

2. Does the company have an ongoing relationship or affiliation with an equipment manufacturer?  X Yes  No If yes, explain on a separate, signed sheet.

3. Has the company (or any owner) ever defaulted on a contract forcing a surety to suffer a loss?  X Yes  No If yes, explain on a separate, signed sheet.

4. In the past five (5) years, has the company had any project with disputed amounts more than $50,000 or a project which was terminated by the owner, owner’s representative or other contracting party and which required completion by another party?  X Yes  No If yes, explain on a separate, signed sheet. State the project name, location, owner/contact person, telephone number, contract value, disputed amount, date and reason for termination/dispute.

5. Has the company, an affiliate company, or any owner ever declared bankruptcy or been in receivership?  X Yes  No If yes, explain on a separate, signed sheet.

6. Has the company ever had an arbitration on contracts in the past five (5) years?  X No If yes, explain on a separate, signed sheet. State the project name, location, owner/contact person, telephone number, contract value, disputed amount, a brief description and final resolution.

7. Does the company have any outstanding liens or stop notices for labor and/or materials filed against any contracts which have been done or are being done by the company?  X No If yes, explain on a separate, signed sheet. State the project name, location, owner/contact person, telephone number, amount of dispute, and brief description of the situation.

THE UNDERSIGNED DECLARES UNDER PENALTY OF PERJURY THAT ALL OF THE INFORMATION SUBMITTED WITH THIS PROPOSAL IS TRUE AND CORRECT.

SIGNATURE:  
NAME:  Bruce Ou  
TITLE:  Principal-In-Charge
PBK-WLC has become one of the most, if not the most, experienced school design firm in the country. PBK-WLC has completed over 2,000 addition and/or renovation projects, 220+ new elementary schools, 90+ new middle schools, and 150+ educational support facilities. PBK-WLC has completed hundreds of projects in the past five years. Below is a list of our California clients we serve as well as some of our most recent completed and in progress projects.

**CURRENT CLIENTS:** Below is an abbreviated list of school districts we have worked with in the last five years. Southern California clients are in **bold**.

- ABC USD
- Acalanes Union HSD
- Alta Loma SD
- Alvina ECSD
- Amador County USD
- Arcadia USD
- Banta ESD
- Beaumont USD
- Brentwood Union SD
- Burnt Branch ESD
- Capistrano USD
- Carden Arbor View School
- Caruthers USD
- Castaic Union SD
- Castro Valley USD
- Centinela Valley UHSD
- Central School District
- Central USD
- Centralia USD
- Chino Valley USD
- Christian Brothers HS
- Claremont USD
- Clay JESD
- Clovis USD
- Colton USD
- Compton USD
- Corona-Norco USD
- Cotati-Rohnert Park USD
- Cucamonga SD
- Desert Sands USD
- Dinuba USD
- El Segundo USD
- Exeter USD
- Fillmore USD
- Fresno COE
- Fresno USD
- Fullerton JUHSD
- Galt JUESD
- Garden Grove USD
- Golden Plains USD
- Golden Valley USD
- Granada Hills Charter HS
- Guerneville SD
- Hacienda-La Puente USD
- Hemet USD
- Hesperia USD
- Huntington Beach UHSD
- Jurupa USD
- Kern UHSD
- Kings Canyon USD
- Kings River-Hardwick SD
- Klamath-Trinity JUSD
- Lodi USD
- Long Beach USD
- Lowell JSD
- Madera USD
- Maple SD
- Marysville JUSD
- Mendota USD
- Menifee Union SD
- Merced City SD
- Moreno Valley USD
- Monson-Sultana JUESD
- Montebello USD
- Mountain View SD
- Mt. Diablo USD
- Modesto City Schools
- Mountain Valley USD
- Muroc Joint USD
- Murrieta Valley USD
- Natomas USD
- Napa COE
- Novato USD
- Nuvieview Union SD
- Oakley Union ESD
- Ontario-Montclair SD
- Orange USD
- Oxnard Union HSD
- Palmdale SD
- Palm Springs USD
- Paramount USD
- Pasadena USD
- Paso Robles JUSD
- Pine Ridge ESD
- Pleasant Valley SD
- Plumas USD
- Pomona USD
- Poway USD
- Recovery SD
- Reed Union SD
- Reef-Sunset USD
- Ripon USD
- Riverside COE
- Riverside USD
- Rowland USD
- Saddleback Valley USD
- San Bernardino City USD
- San Diego USD
- San Luis Coastal USD
- San Marcos USD
- San Juan USD
- San Leandro USD
- San Ysidro SD
- Sanger USD
- Santa Rosa City Schools
- Santa Ynez Valley UHSD
- Santee SD
- Solano COE
- St. Helena USD
- Sunnyside UESD
- Twin Rivers USD
- Upper Lake USD
- Val Verde USD
- Ventura USD
- Visalia USD
- West Contra Costa USD
- West Covina USD
- Westminster SD
The following information is provided for five contracts within the past five years:

<table>
<thead>
<tr>
<th>Project Description</th>
<th>School District</th>
<th>District Location</th>
<th>Contact Person</th>
<th>Address</th>
<th>Phone</th>
<th>Contract Amounts</th>
<th>Start Date</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDGEWOOD CTE BUILDING AND EVENT CENTER</td>
<td>WEST COVINA UNIFIED SCHOOL DISTRICT</td>
<td>WEST COVINA, CA</td>
<td>Dave Larkin - Chief Facilities Director</td>
<td>1717 W. Merced Avenue, West Covina, CA 91790</td>
<td>(626) 939-4600</td>
<td>$12,750,000</td>
<td>2017</td>
<td>Completed</td>
</tr>
<tr>
<td>CENTENNIAL HIGH SCHOOL MEDIA CENTER REMODEL</td>
<td>CORONA-NORCO UNIFIED SCHOOL DISTRICT</td>
<td>CORONA, CA</td>
<td>John Vondriska</td>
<td>2820 Clark Avenue, Norco, CA 92860</td>
<td>(951) 736-5045</td>
<td>$2,554,611</td>
<td>2016</td>
<td>Completed</td>
</tr>
<tr>
<td>SATO ACADEMY OF MATHEMATICS AND SCIENCE</td>
<td>LONG BEACH UNIFIED SCHOOL DISTRICT</td>
<td>LONG BEACH, CA</td>
<td>Brooke Murray - Administrator, Facilities, Development and Planning</td>
<td>1515 Hughes Way, Long Beach, CA 90810</td>
<td>(562) 997-75503</td>
<td>$12,000,000</td>
<td>2016</td>
<td>Completed</td>
</tr>
<tr>
<td>JEFFERSON ELEMENTARY SCHOOL ADDITION AND RENOVATION</td>
<td>RIVERSIDE UNIFIED SCHOOL DISTRICT</td>
<td>RIVERSIDE, CA</td>
<td>Ana Gonzalez - Director of Planning and Development</td>
<td>3380 14th Street, Riverside, CA 92501</td>
<td>(909) 788-7391</td>
<td>$14,303,274</td>
<td>2017</td>
<td>In Progress (est. 2021)</td>
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</table>
**PORTOLA HILLS ELEMENTARY SCHOOL MODERNIZATION**  
**SADDLEBACK VALLEY UNIFIED SCHOOL DISTRICT || TRABUCO CANYON, CA**

| Name, Address, and Phone | Stella Escario-Doiron - Chief of Facilities, Maintenance, Operations, Construction, and Transportation  
25631 Peter A. Hartman Way, Mission Viejo, CA 92691  
(714) 870-2800 |
|-------------------------|--------------------------------------------------------------------------------------------------|
| Number of Contact Person: | Stella Escario-Doiron - Chief of Facilities, Maintenance, Operations, Construction, and Transportation  
25631 Peter A. Hartman Way, Mission Viejo, CA 92691  
(714) 870-2800 |
| Nature of Firm’s Responsibility: | Prime |
| Type of Contract: | Design-Bid-Build |
| Contract Amounts: | $13,618,070 |
| Start Date: | 2016 |
| Current Status: | Completed |

*For one of the above projects, provide a cost breakdown of the following project components: technical analysis, design and implementation, project management, monitoring, training, educational programs, maintenance (if any), and budgeting.*

| **PORTOLA HILLS ELEMENTARY SCHOOL MODERNIZATION**  
**SADDLEBACK VALLEY UNIFIED SCHOOL DISTRICT || TRABUCO CANYON, CA** |  
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Technical Analysis, Design and Implementation:</td>
<td>$574,633 (45%)</td>
</tr>
<tr>
<td>Project Management:</td>
<td>$319,241 (25%)</td>
</tr>
<tr>
<td>Monitoring:</td>
<td>$63,648 (5%)</td>
</tr>
<tr>
<td>Training:</td>
<td>$63,648 (5%)</td>
</tr>
<tr>
<td>Educational Programs:</td>
<td>$63,648 (5%)</td>
</tr>
<tr>
<td>Maintenance (if any):</td>
<td>$63,648 (5%)</td>
</tr>
<tr>
<td>Budgeting:</td>
<td>$127,696 (10%)</td>
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</table>
Attachment F

STATEMENT OF NON-CONFLICT OF INTEREST

NEWPORT MESA UNIFIED SCHOOL DISTRICT

REQUEST FOR PROPOSALS AND STATEMENT OF QUALIFICATIONS FOR ARCHITECTURAL SERVICES

The undersigned, on behalf of the consulting firm set forth below (the “Consultant”), does hereby certify and warrant that, if selected, the Consultant while performing the consulting services required by the Request for Qualification, shall do so as an independent contractor and not as an officer, agent or employee of the Newport Mesa Unified School District (“the District”). The undersigned further certifies and warrants that: (1) no officer or agent of the Consultant has been an employee, officer or agent of the District within the past two (2) years; (2) the Consultant has not been a source of income to pay any employee or officer of the District within the past twelve (12) months; (3) no officer, employee or agent of the District has exercised any executive, supervisory or other similar functions in connection with the Consultant Agreement or shall become directly or indirectly interested financially in the Consultant Agreement; and (4) the Consultant shall receive no compensation and shall repay the District for any compensation received by the Consultant under the Consultant Agreement should the Consultant aid, abet or knowingly participate in violation of this statement.

Signature

Printed Name

Title

Date

Bruce Ou

Principal-In-Charge

10/15/2021
Attachment G

FIRM PROPOSAL / OFFER FORM

This Proposal/Offer Form must be duly executed and submitted with any proposal/offer to NMUSD.

The Submitter hereby agrees that its proposal/offer is subject to all RFQ # 107-22 provisions, terms and conditions, attachments, exhibits, amendments and other applicable materials which are attached or incorporated by reference. Submitter hereby agrees to promptly enter into an agreement in substantial accordance with such RFQ provisions, terms and conditions within five (5) days of the Districts intent to award the contract.

The Submitter hereby agrees that its attached proposal/offer of which this is part, is a firm and irrevocable offer and valid for acceptance by NMUSD for the period sixty (60) days after closing. The Submitter hereby agrees that if its proposal/offer is accepted by NMUSD that it shall provide all of the services in accordance with the RFQ, as it may be amended.

Name of Person Duly Authorized to Execute this Proposal/Offer: Bruce Ou

Duly Authorized Signature: [Signature]

Title: Principal-In-Charge

Date of this Proposal/Offer: 10/15/2021

Submitter Name: PBK-WLC

Submitter Address: 600 Anton Boulevard, Suite 1375

Costa Mesa, CA 92626

Submitter Telephone: 949-548-5000

Submitter Email: bou@pbk-wlc.com
Attachment II

NON-COLLUSION Declaration

The undersigned declares:

I am the Principal-In-Charge of PBK-WLC, the party making the foregoing RFQ.

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

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

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on 10/15/2021 [date], at Costa Mesa [city], California [state].

Name of Submitter: PBK-WLC / Bruce Ou

Signature: ____________________________

Name: Bruce Ou

Title: Principal-In-Charge
**B Experience**

i. New Construction and Modernization. Provide a brief description of the firm’s experience in new construction and modernization projects. At a minimum, identify the number of years of experience the firm has in new construction and modernization projects.

For each project we undertake, PBK-WLC’s top objectives are to provide world-class project leadership and deliver a high level of project-specific expertise. The PBK-WLC team will offer the depth of knowledge and resources needed to immediately begin construction of Newport-Mesa Unified School District’s new classrooms, modernization projects, technology enhancements, electrical upgrades, support facilities, replacement of relocatable facilities with permanent buildings and associated site improvements and more.

Although new construction and modernization projects are similar in their overall approach and process, there are a few areas in new construction/rebuilds that require crucial timelines, planning, agency coordination, and approvals.

The PBK-WLC team understands what it takes to work effectively and efficiently on new, renovation, and modernization projects. We build strong relationships among the team including the District, contractor, subcontractors, inspectors, agency representatives, and especially the construction manager. Close day-to-day communication is mandatory to maintain tight schedules. A strong sense of urgency must be developed and sustained by every team member throughout the construction phase to keep on track.

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ii. List all K-12 school projects that firm has worked on within the last three (3) years. Limit response to no more than the twenty (20) most recent projects. Include a minimum of five (5) recent K-12 school maintenance projects the firm has worked on within the last three (3) years with a budget of less than $1,000,000, two (2) projects should be less than $500,000. Your project descriptions should include the above requested information.

**K-12 school maintenance projects the firm has worked on within the last three (3) years with a budget of less than $1,000,000**

**CAPISTRANO VALLEY HIGH SCHOOL**  
Capistano Valley Unified School District

**SCOPE OF WORK:**  
CCA College Prep Academy Portables and Renovation

**YEARS OF CONSTRUCTION:**  
1

**CONSTRUCTION COST:**  
$950,000.00

**CLIENT CONTACT:**  
John Forney, Chief Facilities Officer  
(949) 234-9545

---

**BUDGET <$1,000,000**
TESORO HIGH SCHOOL
Capistano Valley Unified School District

SCOPE OF WORK:
Sand Volleyball Courts
YEARS OF CONSTRUCTION:
5 Months
CONSTRUCTION COST:
$916,295.00
CLIENT CONTACT:
John Forney, Chief Facilities Officer
(949) 234-9545

BUDGET <$1,000,000

LOS AMIGOS HIGH SCHOOL
Garden Grove Unified School District

SCOPE OF WORK:
Gym Bleacher Replacement
YEARS OF CONSTRUCTION:
10 months
CONSTRUCTION COST:
$624,601.00
CLIENT CONTACT:
Jerry Hills, Director of Facilities
(714) 663-6442

BUDGET <$1,000,000

K-12 school maintenance projects the firm has worked on within the last three (3) years 2 projects should be less than $500,000

NIXON ELEMENTARY SCHOOL
ABC Unified School District

SCOPE OF WORK:
Parking Lot Construction
YEARS OF CONSTRUCTION:
Started 2021 (In Construction)
CONSTRUCTION COST:
$150,000.00
CLIENT CONTACT:
Ryan Carter, Bond Program Manager
(562) 926-5566

BUDGET <$500,000
STATEMENT OF QUALIFICATIONS FOR PBK-WLC FOR ARCHITECTURAL SERVICES IN RESPONSE TO NEWPORT-MESA UNIFIED SCHOOL DISTRICT RFQ #107-22

**CAPISTRANO VALLEY HIGH SCHOOL**  
Capistrano Valley Unified School District

**SCOPE OF WORK:** Softball Scoreboard Creation  
**YEARS OF CONSTRUCTION:** 9 Months  
**CONSTRUCTION COST:** $100,006.46  
**CLIENT CONTACT:** John Forney, Chief Facilities Officer  
(949) 234-9545

**PHILIP REILLY ELEMENTARY SCHOOL**  
Capistrano Valley Unified School District

**SCOPE OF WORK:** Shade Structure Replacement  
**YEARS OF CONSTRUCTION:** 5 Months  
**CONSTRUCTION COST:** $286,405.33  
**CLIENT CONTACT:** John Forney, Chief Facilities Officer  
(949) 234-9543

**WHITNEY HIGH SCHOOL**  
ABC Unified School District

**SCOPE OF WORK:** Additions and Modernizations  
**YEARS OF CONSTRUCTION:** Started 2021 (In Construction)  
**CONSTRUCTION COST:** $8,268,641.00 (est)  
**CLIENT CONTACT:** Ryan Carter, Bond Program Manager  
(562) 926-5566

**GAHR HIGH SCHOOL**  
ABC Unified School District

**SCOPE OF WORK:** Additions and Modernization  
**YEARS OF CONSTRUCTION:** Summer 2022  
**CONSTRUCTION COST:** $20,000,000.00 (est)  
**CLIENT CONTACT:** Ryan Carter, Bond Program Manager  
(562) 926-5566 Ext. 21376
<table>
<thead>
<tr>
<th>Project Description</th>
<th>Scope of Work</th>
<th>Years of Construction</th>
<th>Construction Cost</th>
<th>Client Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>HVAC Upgrade &amp; District-wide Modernization</td>
<td>Modernization and HVAC replacement; 2 HS, 4 IS, 16 ES</td>
<td>2012-2020</td>
<td>$100,000,000.00+ (est)</td>
<td>Jerry Hills, Director of Facilities (714) 663-6442</td>
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<td>Newhart Middle School STEM</td>
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<td>3</td>
<td>$8,327,814.00</td>
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<td>Aliso Niguel High School STEM</td>
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<td>$8,766,022.00 (est)</td>
<td>John Forney, Chief Facilities Officer (949) 234-9545</td>
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<td>Dr. Ralph H. Baker 21st Century ES</td>
<td>New Construction</td>
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<td>$26,826,362.00</td>
<td>Joe Pont, Director of Facilities, Maintenance and Grounds (760) 245-3533</td>
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</table>
MADERA TECHNICAL EDUCATION CENTER
Madera Unified School District

**SCOPE OF WORK:** New Construction

**YEARS OF CONSTRUCTION:** 2

**CONSTRUCTION COST:** $36,000,000

**CLIENT CONTACT:** Rosalind Cox, Director, Facilities Planning/Construction Management

(559) 675-4548

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LAKELAND ELEMENTARY SCHOOL — TEXAS
Humboldt Independent School District

**SCOPE OF WORK:** New Construction

**YEARS OF CONSTRUCTION:** 1.5

**CONSTRUCTION COST:** $59,289,046.00

**CLIENT CONTACT:** Martha Buckner, Assistant Superintendent for Support Services

(281) 641-8702

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REDBUD ELEMENTARY SCHOOL — TEXAS
Round Rock Independent School District

**SCOPE OF WORK:** New Construction

**YEARS OF CONSTRUCTION:** 3

**CONSTRUCTION COST:** $37,655,218

**CLIENT CONTACT:** Terry Worchester, Chief Operating Officer

(510) 464-5012

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BRANCH ELEMENTARY SCHOOL
Muroc Joint Unified School District

**SCOPE OF WORK:** New Construction

**YEARS OF CONSTRUCTION:** 4

**CONSTRUCTION COST:** $48,415,061.00

**CLIENT CONTACT:** Kevin Cordes, Superintendent

(760) 769-4821
<table>
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<tr>
<th>Project Name</th>
<th>District</th>
<th>Scope of Work</th>
<th>Years of Construction</th>
<th>Construction Cost</th>
<th>Client Contact</th>
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<tbody>
<tr>
<td>Desert High School</td>
<td>Muroc Joint Unified School District</td>
<td>Addition and Modernization</td>
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<td>$68,190,523.00</td>
<td>Kevin Cordes, Superintendent (760) 769-4821</td>
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<td>Hawthorne HS Nyman Hall CTE Theater</td>
<td>Centinela Valley Union High School District</td>
<td>New Construction</td>
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<td>$12,500,000.00</td>
<td>Dr. Stephen W. Nellman, Superintendent (310) 263-3200</td>
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<td>Hawthorne High School</td>
<td>Centinela Valley Union High School District</td>
<td>Phase 2 Classroom Addition</td>
<td>4</td>
<td>$46,841,542.00</td>
<td>Dr. Stephen W. Nellman, Superintendent (310) 263-3200</td>
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ORGANIZATIONAL CHART
Our team brings the collective resources of global design and innovative leadership. Together, we function as a single team with clearly defined lead and support roles for any project we’re fortunate to work on. For your team, we have specifically hand-selected team members for the Newport-Mesa USD with unique understandings of the region, community, and culture of the area.
BRUCE OU  AIA  
PRINCIPAL-IN-CHARGE

Your projects will be managed by Bruce Ou, a PBK-WLC employee for 19 years. Bruce will manage the performance of our team from the development of initial concepts to the completion of the project, working directly with the project team, shaping and directing the work to transform client objectives into valuable architecture. As the primary contact for the Newport-Mesa USD, Bruce Ou will be working with your team on a regular basis to establish and tell your story with his partnering personality and pragmatic approach to architectural services.

EDUCATION
Master of Architecture, University of California, Berkeley, College of Environmental Design
Bachelor of Arts, University of California, Berkeley, College of Environmental Design
Major - Architecture
Minor - Urban Planning

REGISTRATIONS
Register Architect:
California #C-34832
Registered Architect:
Hawaii #AR-19097

AFFILIATIONS
American Institute of Architects, Secretary [Executive Board of Directors] 2015-2018
LEED™ Accredited Professional
National Council of Architectural Registration Boards [NCARB]

RELEVANT DESIGN EXPERIENCE

ABC Unified School District
• Whitney High School Addition and Modernization
• Gahr High School Addition and Modernization

Garden Grove Unified School District
• 40+ District-Wide Campus HVAC Upgrade Projects
• Santiago High School Modernization
• Doig Intermediate School Upgrades
• Los Amigos High School Modernization

Capistrano Unified School District
• Aliso Niguel High School STEM Addition
• Palisades Elementary School HVAC Replacements and ADA Upgrades
• Newhart Middle School STEM Addition
• Dana Hills High School Turf Replacement
• Tesoro High School Sand Volleyball Addition

Colton Joint Unified School District
• Colton High School Sports Stadium Modernization

Centinela Valley Union High School District
• Hawthorne High School Phase 1
• Hawthorne High School Phase 2
• Hawthorne High School Nyman CTE Theater

Muroc Joint Unified School District
• Desert High School Modernization & Additions
• Branch Elementary School
• West Boron HVAC Replacement
• Bailey Elementary School Modernization & Additions

Monrovia Unified School District
• Monrovia High School Additions & Modernizations
JOSE VALLARTA
SENIOR PROJECT MANAGER

Jose is responsible for the complete delivery of the project from Concept through Occupancy and DSA Certification. PBK-WLC’s Project Managers are intimately involved in all stages of project delivery and actively participate with both the PBK-WLC Project Team and the consulting engineering disciplines. Mr. Vallarta is also responsible for overseeing and updating the Project Budget, Schedule, and Scope. PBK-WLC Project Managers are often the first line of communication between the Client and the firm. Jose will stay with the project, and the Client, from the initial programming meetings through the project’s completion/closeout. He will be your primary contact.

EDUCATION
Bachelor of Architecture, California State Polytechnic University, Pomona

AFFILIATIONS
LEED™ GA (Leadership in Energy and Environmental Design, Green Associate)
Toastmasters International

RELEVANT CAREER EXPERIENCE

ABC Unified School District
• Gahr High School Addition and Modernization
• Whitney High School Addition and Modernization
• Nixon Elementary School Parking Addition
• District Office Fueling Station

Centinela Valley Union High School District
• Hawthorne High School Classroom Additions
• Hawthorne High School Nyman Hall CTE Theater
• Hawthorne High School Interim Portable Restrooms

Garden Grove Unified School District
• Los Amigos HS Bleacher/Flooring
• Los Amigos HS Theater ADA
• Los Amigos HS Modernization
• Santiago HS Modernization
• Parkview Elementary School HVAC
• Warren Elementary School HVAC
• Irvine Intermediate School Modernization
• Fitz Intermediate School Modernization
• Fitz Intermediate School HVAC
• Lawrence Elementary School HVAC
• Hazard Elementary School HVAC
• Newhope Elementary School Modernization
• Mitchell Elementary School HVAC
• Warren Elementary School Modernization
• Crosby Elementary School Modernization
• Parkview Elementary School Modernization
• Murdy Elementary School Modernization
• Carrillo Elementary School Modernization
KATHLEEN GILLETTE AIA
PROJECT ARCHITECT

As the Project Architect, Kathleen will prepare sketches, technical drawings, site assessments, and graphic studies for all phases with our team. She will collaborate with Bruce and Jose to develop thoughtful, strategic documentation which will target your cognitive, cultural, physical, and social environment, as well as lead all final programming, functional diagrams, and related documents.

EDUCATION
Bachelor of Science, Architecture, California Polytechnic State University, Pomona

REGISTRATIONS
Registered Architect: California #C-37204

AFFILIATIONS
American Institute of Architects

RELEVANT CAREER EXPERIENCE

ABC Unified School District
• Whitney High School Additions and Modernization

Capistrano Unified School District
• Aliso Niguel High School STEM Addition
• Newhart Middle School STEM Addition
• Chaparral Elementary School Modernization
• Palisades Elementary School New Portables
• Palisades ES HVAC Upgrades
• Palisades ES Restroom Renovation
• Aliso Niguel HS Turf Replacement
• College + Career Prep Academy New Portables and Renovation
• Bridges Community Day High School Restroom Portable

Central School District
• District Office Tenant Improvements
• District Office Building Assessment
• Bear Gulch Elementary School Modernization/Addition
• Dona Merced Elementary School Modernization/Addition
• Valle Vista Elementary School Security and HVAC Upgrades
• Central Elementary School Security and HVAC Upgrades
• Cucamonga Middle School Admin Office Lobby Security
• Ruth Musser Middle School Admin Office Front Lobby
• Coyote Canyon Elementary School Admin Office Front Lobby

Muroc Joint Unified School District
• Boron JH/SH Modernization/Additions
• Desert JH/SH Modernization/Additions
• Bailey Elementary School Modernization/Additions
MARCO EACRETT  AIA, LEED AP
PROGRAMMING SPECIALIST

For more than 25 years, Marco has specialized in master planning, programming, design and project management of K-12 and community college projects in California. As a Partner, he performs as PBK-WLC’s day-to-day service champion and senior client executive in charge of the successful execution of each assigned project.

EDUCATION
Bachelor of Architecture,
California State Polytechnic
University, Pomona

REGISTRATIONS
Registered Architect:
California #C-28195

AFFILIATIONS
National Council of Architectural Registration Boards (NCARB)
Adjunct Professor, California
Baptist University

RELEVANT PROJECT EXPERIENCE

Saddleback Valley Unified School District
- District-Wide Facilities Master Plan
- Portola Hills Elementary School Modernization
- Lake Forest Elementary School Modernization

Palm Springs Unified School District
- Long Range Facility Master Plan
- Desert Hot Springs High School CTE Building

Riverside County Office of Education
- Las Brisas Administration Building Conversion to STEAM Pre-school Facility

West Covina Unified School District
- Edgewood Middle School Event Center

El Segundo Unified School District
- Long-Range Facilities Master Plan
- Richmond St. Elementary School Modernization

Long Beach Unified School District
- Kettering Elementary School Modernization
- Rogers Elementary School Modernization
- Lowell Elementary School Modernization

Hacienda La Puente Unified School District
- Cedarlane Academy Modernization
- New Wedgeworth K-8 School
JAMES GONZALES
JOB CAPTAIN

James’ wide range of skills has allowed him to take on many roles at PBK-WLC, ranging from design, DSA approval, construction administration, to the closeout and successful completion of many projects.

EDUCATION
Bachelor of Architecture, California State Polytechnic University, Pomona

RELEVANT PROJECT EXPERIENCE

Orange Unified School District
- Anaheim Hills ES Shade Structure
- Taft ES Shade Structure
- Orange Pre-K Shade Structure
- Crescent ES Shade Structure
- El Modena HS Scoreboard Replacement

Huntington Beach Union High School District
- 10 Culinary and Photo Lab CTE Renovation
- Edison HS Pool Replacement
- Fountain Valley HS Pool Replacement
- Marina HS Pool Replacement
- Huntington Beach Batting Cage
- Master Plan

Westminster Unified School District
- DeMille ES Modernization
- Anderson ES Modernization

Long Beach Unified School District
- Naples ES Asphalt Replacement
- Mann ES Modernization
- Lowell ES Modernization
- Naples ES Modernization
- Kettering ES Modernization
- Rogers MS Modernization
- Sato Academy (New Building)

Fresno Unified School District
- Urban Design Academy (New School)
LANCE HINKLE
PROJECT COORDINATOR

Lance has 3.5 years of experience working in a fast-paced architectural office while juggling multiple projects. His primary focus consists of taking projects from a Schematic Design phase through Design Development, Construction Documents, DSA approval, and Construction Administration. Lance is heavily involved with the construction documentation while also helping with design and presentation documents.

EDUCATION
Bachelor of Architecture, University of New Mexico

RELEVANT PROJECT EXPERIENCE

Orange Unified School District
- 5 Shade Structures
- Multiple Fire Alarm Projects

Huntington Beach Unified School District
- Huntington Beach Batting Cage
- Huntington Beach Master Plan

Westminster Unified School District
- Fryberger Elementary School Modernization
- Meairs Elementary School Modernization
- Hayden Elementary School Modernization
- Demille Elementary School Parking Replacement
- Multiple Fire Alarm Projects
- District Office Project
- Land Elementary School Playground

El Segundo Unified School District
- Richmond Elementary School Fencing
- Richmond Elementary School New 2-story Classroom Building (New Building)
- Richmond Elementary School Restroom Remodel
- Center Street Elementary School Fencing

Centralia Unified School District
- Centralia Elementary School Modernization

Long Beach Unified School District
- Mann Elementary School Modernization
- Lowell Elementary School Modernization
- Naples Elementary School Modernization
SHERRI MERRILL

DSA/FUNDING

Sherri Merrill joined PBK-WLC in 2001 as a Facility Planner and State Agency Advocate. She has over 18 years of experience. Ms. Merrill works jointly with all staff members to ensure new and modernized schools meet state requirements and to maximize funding opportunities through the State Facility Program. She provides the team with the most current information pertaining to funding opportunities for school construction.

Sherri is responsible for making sure that a school project is getting the appropriate amount of attention from CDE, OPSC, and DSA. She will be an extension of the district’s facilities department and assist them with enrollment projections and state applications.

As a member of the planning department, she will oversee facility planning through contract or actual onsite management. Sherri is experienced in eligibility determination through OPSC and processing of all forms. She can assist school districts with facility needs planning, site acquisition, CEQA, and DTSC consultant coordination.

EDUCATION
Associate of Arts, Southwestern College, Chula Vista
Certificate in Facilities Planning, University of California, Riverside

AFFILIATIONS
Coalition for Adequate School Housing (CASH)
California Association of School Business Officials (CASBO)

RELEVANT PROJECT EXPERIENCE

Cucamonga School District
• Rancho Cucamonga Middle School Building B Renovations
• Rancho Cucamonga Middle School Building C Addition

Menifee Union School District
• Elementary School No. 14, New construction

Desert Sands Unified School District
• Hoover Elementary School Additions and Renovations

Victor Elementary School District
• Elementary School No. 20, New construction

Chino Valley Unified School District
• Adult School Portable Building/Parking lot

Oakley Union Elementary School District
• Summer Lake Elementary School

Tracy Unified School District
• Central Elementary School
REx Wang PE, LEED AP
MEP+T EXPERT || DIRECTOR, LEAF ENGINEERS

Rex is a Professional Mechanical Engineer with over 13 years of experience with code compliance, design, construction, start-up, controls, and commissioning of HVAC systems. A LEED Accredited Professional, Rex has experience in various plan-spec, design-build, and integrated project delivery involving new and tenant improvement construction projects for healthcare, education, corporate, hospitality, and special projects such as thermal expansion and seismic design. His proven ability to work in a dynamic, fast-paced environment is enhanced by his skills in building lasting, cohesive relationships.

EDUCATION
Bachelor of Science, Mechanical Engineering, California State Polytechnic University, Pomona
ASPE Plumbing System Design I, II, and III Courses, University of California, Los Angeles

REGISTRATIONS
Professional Mechanical Engineer: California #M36155
Leadership in Energy and Environmental Design Accredited Professional

AFFILIATIONS
American Society of Heating, Refrigeration, and Air Conditioning Engineers
U.S. Green Building Council
Coalition for Adequate School Housing (CASH)

RELEVANT PROJECT EXPERIENCE

Newport-Mesa Unified School District
• Estancia High School Engineering Services; Inspections; and High School Locker Room HVAC

Hacienda La Puente Unified School District
• Wedgeworth Elementary School (NEW)

Hacienda La Puente Union High School District
• Edison High School Culinary Arts
• Edison High School Media Studio
• Edison High School Photo Laboratory
• Fountain Valley Culinary Arts Center
• Marina High School Culinary Arts Center
• Ocean View High School Culinary Arts
• Ocean View High School Photo Laboratory
• Westminster High School Culinary Arts
• Edison High School Pool Replacement

Long Beach Unified School District
• Sato Academy Project Frog
• Wilson High School HVAC
• Rogers Middle School Interim Housing

Beaumont Unified School District
• Facilities Master Plan

Corono-Norco Unified School District
• Reagan Elementary School Portables

Lowell Joint School District
• Maybrook Interim Housing
• Meadow Green Elementary School Modernization
• Starbuk Intermediate School Modernization
STATEMENT OF QUALIFICATIONS FOR PBK-WLC FOR ARCHITECTURAL SERVICES IN RESPONSE TO NEWPORT-MESA UNIFIED SCHOOL DISTRICT RFQ #107-22

DR. RUDY M. CASTRUITA
EDUCATIONAL RESOURCE

As part of the Educational Resources team for PBK-WLC, Rudy works with clients to ensure that the educational goals and objectives of the district and site are reflected into the form and function of the plans designed for the client. In addition, Rudy will work to improve lines of communication among PBK-WLC and the school construction teams and staff.

EDUCATION
Ed.D. Educational Administration, University of Southern California
Master of Science, School Administration, Utah State University
Bachelor of Science, Social Science, Utah State University

AFFILIATIONS
Coalition for Adequate School Housing (CASH)
California Association of School Business Officials (CASBO)

PROFESSIONAL ACHIEVEMENTS

Established three regional technology centers as hubs for educational information, resources and technology support for local districts and their communities: Joe Rindone Regional Technology Center ($4.2M); North County Regional Education Center ($8.4M); and South County Regional Education Center ($13M).

With President Vicente Fox Quesada, initiated Projecto California, a partnership with the Mexican government, to provide $40M worth of computer software to students in California and across the U.S. and launched hundreds of adult literacy centers throughout the nation.

Saved districts $6.4M in costs for mental health services for special education students by organizing a collaboration among all 42 districts to ensure full funding of these services by negotiating an agreement with county government agencies.

Established the California High School Exit Exam (CAHSEE) Compact to eliminate the achievement gap with the support of Resolutions from 42 governing boards and superintendents to implement the Compact with the goal of 100% pass rate on the CAHSEE by the Class of 2006.

Developed a joint labor-management trust that provides benefits for some 86,000 employees and their families in 27 districts; instituted a 30-district consortium to provide high quality legal services at significant cost savings to school districts.

Since 2000, received $50M+ annually in state and federal grants to serve districts in areas of: curriculum, professional development, school safety/violence prevention, early childhood education, and technology.
iv. Public Works Requirements. A brief summary
description of firm’s familiarity with applicable laws and
requirements for public works projects in general and
K-12 California school projects in particular, including
DSA, OPSC, CDE, CEQA, and DTSC. If the firm has DSA
experience, identify all DSA offices the firm has worked
with in the last three (3) years.

Our team of staff and consultants has developed
close relationships with state and local agencies that
review and approve the design and construction of
school facilities. Having these relationships allows
our team to adjust and react to issues with regard to
to funding and approvals. By maintaining these close
relationships, we are able to involve agencies early in
our design process and expedite project approvals as
necessary to meet your schedule.

Office of Public School Construction (OPSC). An
organized funding program is the key to implementing
projects. Our team will assist in defining your project
goals and accurately identifying the funding sources
and timing necessary to meet and exceed your goals.
We have extensive experience in working with the
OPSC in the preparation of documents required for
project funding, including negotiating with OPSC staff
to maximize funding.

Division of State Architect (DSA). Our team has
learned that a thorough understanding of the
requirements and processes of DSA must be combined
with discipline and a high level of organization to
make the construction oversight process as efficient
as possible. We believe that DSA certification begins
at the start of the project, and documentation is
completed at every step of the way, so that closeout is
simple to complete at the end of the project.

Specific methodology and procedures we use include:

Prior to Submittal of Plans to DSA:
• Review the campus site for any outstanding non-
certified projects to identify and resolve.
• Meet with DSA for more complex projects to
identify and discuss any issues, materials, or
construction methods that might be out of the
norm or more cutting edge.

At Submittal and Backcheck:
• Provide DSA with complete and coordinated plans
to speed their review process.
• Respond to each and every DSA comment when we
go to backcheck.
• Talk to plan reviewers in advance to fully
understand the comment.
• Be respectful at backcheck. Be courteous. Be
professional.

After Bid is Awarded:
• Gather and submit DSA forms 5PI and 102IC
to inform DSA of the start of construction and
request the opening of the project box.
• Meet with all parties (Project Inspector, Lab of
Record, District, Construction Manager, AOR,
and Consultants) at the kickoff meeting to
confirm that everyone understands their role and
responsibilities with regard to documentation and
submittal of forms to the DSA box.

During Construction:
• Prepare and submit Construction Change
Documents (CCDs) as necessary for DSA review
and approval.
• Submit interim reports as required for project
milestones.
• Submit Final Verified Reports at the close of the
project to obtain project certification.

Conclusion of Construction:
• Gather all forms from contractor and project
inspector to submit
• Submit final Form 6
• Submit final costs reported by District
• Confirm and follow through the DSA certification
process

Centennial High School Media Center Remodel
Corona-Norco Unified School District
Our team has over 25 years of experience working closely with CDE on preliminary and final site and plan approvals needed for state funding. We have worked closely with local CDE representatives extensively in the past and understand how to keep clear lines of communication open from the minute you have a conceptual design.

v. District. Contracts. Provide a schedule of all Newport-Mesa Unified School District contracts held within the last five (5) years including with respect to each project, the project name and the property address, the contract amount, and architectural firm’s contact person at the District on said project.

<table>
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<th>NEWPORT-MESA UNIFIED SCHOOL DISTRICT</th>
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<tbody>
<tr>
<td><strong>Project:</strong></td>
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<td><strong>Address:</strong></td>
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</tr>
<tr>
<td><strong>Contract Amount:</strong></td>
</tr>
<tr>
<td><strong>District Contact:</strong></td>
</tr>
</tbody>
</table>
The new Madera Technical Education Center is a career technical training school. Students will attend this school concurrent with their home middle school. The District wanted to start these programs to excite student interest before reaching the high school level. Included in this school are six large vocational labs/maker spaces, one vocational shop, a 144-seat lecture hall, a large display room to feature student projects, a student break area, and an administration area.

Agriculture is a significant part of Madera County, so the District wanted to ensure that agriculture would be included in the curriculum for this concurrent middle school. It is with this same idea that the agrarian architectural style design was inspired. The forms, use of wood and metal materials, and earthy colors all lend themselves to the design style. The interior design brought the same elements back inside to keep with the theme. However, it was essential to create modern, highly technical learning spaces for the students.
The Victor Elementary School District had a desire to create a school unlike any in the area — one without traditional grade levels or classrooms. The result is an open concept school with 4,000-square foot studios instead of classrooms, each of which accommodates collaborative indoor and outdoor learning environments and areas for both large and small group instruction.

Given the area’s climate, the entire facility is indoors with small outdoor patios that can be used when needed. The school is also meant to be a community hub with inviting and easily accessible library, multipurpose room, amphitheater, and playgrounds.

Scope of Work:
New Construction

Years of Construction:
3

Construction Costs:
$26,823,362

Client Contact:
Joe Pont
Director of Facilities, Maintenance and Grounds
(760) 245-3533
The design of the additions to Perris High School was approached with a vision of an experience that produces individuals that are not only well educated but also well rounded. Community stakeholders comprised a Planning Committee that met with teachers, specialty directors of specific curriculum and the school principal over 30 times to develop a student-centered concept that emphasized collaboration between disciplines. The insight from the educators inspired a final design in which the built environment that didn’t just house the educational experience but rather was a component that supported and enhanced it.

Perris High School is also a CTE innovation hub that promotes an entrepreneurial spirit among students and supports the district’s business-minded curriculum. The design considers the community by incorporating specialized labs and spaces in which students begin hands-on experiential learning activities to prepare them for future careers. A state-of-the-art two-story Media Arts building houses specialty science and innovation labs (such as Medical assistant, Science, Art and Student Services Center). A one-story Vocational Technology/Cafeteria building houses specialty engineering and innovation labs (such as Applied Engineering, Auto shop, ROTC and Culinary Arts). The campus also features a one-story Boys and Girls Locker/Team rooms building, and one-story Satellite Kitchen to help support the main kitchen facility and to offer student outdoor dining options.
vii. Other Experience. Briefly describe if the firm has experience with the following areas of work:

a. Assisting districts with preparing for a proposed bond, project prioritization, and implementing a local bond program.

Since 1974, PBK-WLC has been assisting school districts with bond campaigns in addition to community outreach efforts to support school district campaigns. As educational planners and designers, 90 percent of projects are funded through GO Bonds.

Our team of experts will partner with you in all aspects of the funding process from project inception to closeout. We will work in collaboration with all stakeholders to ensure maximization of financial resources, including working jointly to ensure all opportunities and options are explored.

PBK-WLC SCHOOL DISTRICT BOND SERVICES

- Facility Condition Assessment & Evaluation
- Educational & Facilities Master Plan Implementation
- ADA Transition Plan Integration
- Staff Interviews & Data Collection
- Funding Analysis
- Bond Projects Identification
- Conceptual Facilities Design
- Sustainability Opportunities
- Communications Strategies
- Public Outreach Facilitation
- Project Cost Estimating & Long-Term Budgeting
- Bond Documentation Design & Publishing
- Bond Materials Presentations
- Post-Bond Planning

b. Exploring alternative funding options and assisting districts with preparing applications for funding.

PBK-WLC utilizes four State Agency Advocates and Educational Resource Members who are former Superintendent of Schools, Principals, and Teachers. They have walked over 30 years in your shoes and will aid Newport-Mesa Unified School District by utilizing their experience in overseeing facilities programs in excess of one billion dollars. Principal Bruce Ou and team also actively attend State Allocation Board meetings and we have served as distinguished panelists for seminars concerning State School Building processes for organizations such as CASH, NCERT and many others. Together, we will harness our many years of school district bond experience, assisting educational clients with bond planning to advance facility improvement programs.

We will work closely with Newport-Mesa Unified School District representatives, bond oversight committee members, and all consultants to provide seamless and unified bond planning. Leveraging our core competencies, we will clearly convey your bond’s objectives and tailor our services to champion your vision with support from the public.

c. Alternative project delivery methods (e.g. lease-lease back).

Our staff has experience with a variety of delivery methods utilized in the execution of California public school projects. The choice of project delivery method is very important in reducing the owner’s risk, and in maximizing your funded dollars. We have in-depth experience with all of the delivery methods and we can assist you in determining which method is best for your projects.

The most common construction delivery method used by school districts is the traditional design-bid-build approach which awards the contract to the lowest responsible bidder (contractor).
PBK-WLC has delivered hundreds of projects over the years using this method and we have developed procedures for tight quality control of documents and proactive construction administration to mitigate the amount of change orders. We have found this approach most effective on smaller and more limited scope projects. The main drawback of this approach is that there will be change orders to present to the District’s governing board which can often be contentious and create bad feelings among team members.

**Lease-Leaseback (LLB)** has been a preferred delivery method for many school districts in recent years. The advantage with lease-leaseback is that you have the option of bringing a contractor on early to work as a team to control systems and costs through pre-construction services as well as establishing a Guaranteed Maximum Price (GMP) to avoid the impact of change orders for Board Approval.

Our experience with **Design-Build (DB)** has been with varying size and types of projects. In design-build, the District typically hires a bridging or criteria architect to perform the programming and early schematic design. It runs from full schematic design bridging to what is known as progressive or collaborative design-build, which leaves more design for the design-build entity (DBE) team.

**Construction Manager Multi-Prime (CMMP)** has also been used as a delivery option for many districts. This option allows the District to use a preferred construction manager who in turn acts as the general contractor in coordinating work to a number of contractors acting as primes. This contracting method works well with smaller projects that have limited trades such as rural and mountain communities. We recently completed numerous projects in this delivery method, but the paperwork and process gets complex on large projects.

PBK-WLC’s team is familiar with each of these construction delivery methods. In addition to the hundreds of projects we have completed using traditional design-bid-build approval, we understand the advantages and drawbacks of each. We realize that each of our clients, as well as each of their individual projects, is unique. It is for this reason that our hand-selected team of professionals will come alongside the District’s team to help you choose the best delivery method for each project.

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Hawthorne High School Student Services and Media Center
Centinela Valley Union High School District
C Project and Cost Management

i. Project Management. Describe the project management procedures employed by your firm to minimize change orders and ensure well-coordinated and complete construction documents. Include the following information:

i. Constructability review. Firm’s approach to reviewing bid documents to make certain that work requirements are clear, the documents are coordinated, and to reduce impacts to the overall project.

ii. Project administration, inspection, and oversight. Firm’s approach to providing general administration of the project and all related documents. Management of regular inspections and keeping the District informed of the progress of construction. Firm’s methods to ensure general oversight of the project including review of documents for compliance with design and examining contractor’s applications for payment.

PBK-WLC has developed a comprehensive checklist which our architects constantly review, cross-referencing the construction documents for accuracy. The project schedule is also arranged so that a 10-day proofing period is allotted prior to bid release to allow for further coordination and evaluation of the drawings and specifications to ensure correctness and other requirements established by the District.

Additionally, the design requirements are reviewed with the client and users throughout the process and against initial program guidelines. A page-turn meeting with the District at schematic design, design development, 50%, and 100% construction documents is our opportunity to validate design requirements.

The logistics of getting all parties involved in a page-turn review can be challenging, but the result is well worth it as these sessions ensure the District’s thorough and complete understanding of what is included in the design documents, and allows the design team to systematically incorporate District and End User input into the design.

The foundation for a successful construction program begins with a thorough and complete project — one in which the documents have been carefully reviewed and coordinated long before construction has begun. Early quality control steps are taken during the documentation phase while the team and consultants have the opportunity to carefully document the project and minimize conflicting information and potential conflicts between building systems.

As the design develops, we will work hand-in-hand with District staff, the site administrators, and site staff to address critically important design issues, such as:

1. Building location. We will explore alternative site locations, remaining conscious of the pre-design issues, to ensure site functionality and flow and address overall site security.
2. Minimizing site interruptions. The location of the building, as well as access to utilities and site flow, are critical components to account for in the design to reduce disruption.
3. Site phasing. The project may require phasing of various components such as portable relocations or building demolition, which need to be accounted for in the design.
4. School site involvement. Consensus building for the project, especially if it involves some logistics to endure, is critical to success. Getting District staff involved and on board early gets them involved in the process and with making critically difficult decisions.
5. Integration. The design needs to be integrated into the site as it relates to District and site standards, as well as issues related to data and the fire alarms and system. A design theme that can integrate with the existing site design from a visual and functional perspective is a critical design component to consider.
6. Design reviews. All of PBK-WLC’s projects go through vigorous constructability reviews, as well as owner reviews, to verify scope at each phase. This is a great process to ensure all of the owner’s comments and design standards have been incorporated into the project.
iii. As-builts. Firm’s approach to identifying project construction changes and deviations from the record drawings and full completion of such data on the final project as-builts, including delivery to the District.

We have found our program of Quality Assurance checks throughout the project to be integral and beneficial to the production of quality documents across all disciplines and specialties. These QA checks are conducted by our Quality Assurance Team, which is comprised of senior technical professionals in all required disciplines with design and construction experience.

The following summarizes our QA review process:

- Interdisciplinary use of professionals not directly involved in the project being reviewed alongside the project team
- Incorporation of review comments in the narrative deliverable given to our clients at the end of each phase, including action items to address comments
- Extensive use of PBK-WLC’s Best Practice Details Library and historic project information on where to look for typical problem areas
- Forbid documents from leaving the office until review comments are addressed and signed-off by the reviewer

We incorporate our QA/QC process and work with the Division of the State Architect (DSA) during each phase of the project is provided below. (See page 32 for more details)

- Submission of Plans to DSA
- At Submittal and Backcheck
- After Bid is Awarded
- During Construction

PBK-WLC understands the need to deliver quality projects, which results in satisfied clients and continued commissions. In order to provide high quality, coordinated documents, we initiate a multi-level quality control program from the very beginning.

We have developed a comprehensive check list that is addressed throughout the entire process to ensure that items are not left out. Our team constantly reviews this check list and cross-references the construction documents for accuracy.

iv. Closeout. Follow-through in obtaining final DSA project closeout and certification approval for all closed projects in the last 15 years. Specifically, identify the firm’s number of DSA projects currently closed.

When working on campuses with uncertified projects, we begin with research to determine what buildings or portions of the site are not certified. It is in the best interest of the District to ensure the projects are certified to avoid liability issues. However, it is not always necessary that they are certified prior to other projects on site being complete.
Certain items are required on campus for any new project to be certified — accessible restrooms, an accessible path of travel from the project to an accessible parking and to a public walkway, and accessible drinking fountains. In addition, uncertified buildings cannot be altered without obtaining certification first.

Before we begin any new work on a campus, we will collect all of the information from DSA’s website. In some cases, it may be necessary to request project files be pulled from DSA archives to see what documents are available, then contact those who were involved on the uncertified project to complete any missing information. PBK-WLC’s DSA closeout team has spent many hours at DSA looking through archived folders.

**EXPERIENCE WITH DSA AND WORKING WITHIN THE DSA PROCESSES**

We have developed an extremely strong working relationship with the Division of the State Architect (DSA) staff in Los Angeles and all other regional offices, which allows us to work very quickly and positively with them to answer any questions or resolve any issues that arise during the design and construction oversight process. We have a DSA specialist on our team who will assist in guiding you through the entire process including permitting and reviews alongside our Senior Project Manager, Jose Vallarta.

Our team has learned that a thorough understanding of the requirements and processes of DSA must be combined with discipline and a high level of organization to make the construction oversight process as efficient as possible. We believe that DSA certification begins at the start of the project, and documentation is completed at every step of the way, so that at the end of the project, closeout is simple to complete. This knowledge has allowed us to assist numerous districts in certification of old closed projects.

The PBK-WLC team has an extensive DSA portfolio having worked on over 2,000 (DSA certified/closed DSA projects: 2,226) California educational facility projects for 45 years.

**DSA Coordination**

- Take initiative and obtain DSA approvals of addenda and CCDs at the time of issuance
- Follow up with DSA to verify documents and forms have been received
- Complete all forms and upload per DSA process
- Lead and assist the contractor and project inspector in completion of DSA forms
- Coordinate testing lab certifications for completion
- Maintain a good communicative relationship with all DSA closeout specialists (which we do)
- Use the Box, know the Box, and BlueBeam
Achieving closeout certification is a vital component in our process and begins with our first submittal to DSA for plan review. We have a team member dedicated to the DSA process which includes project set up, management of checklist, progress tracking, and closeout. We have developed a DSA closeout checklist that lists all the steps and forms that must be completed in order to gain certification of projects.

Our in-house DSA closeout team works with our design team and Project Manager to assure the steps are being completed in the process. It is our Project Manager’s responsibility to maintain contact with the team and work closely with our DSA specialist to submit documents accordingly to keep the process on track.

**ii. Computer Project Management/Scheduling and Electronic Design**

Briefly describe firm’s experience with scheduling and project management software, including on-line project management services. Include the following information:

a. Experience and capability of the firm to produce electronic design and construction drawings; and

b. Identify experience/history on Building Information Modeling or other 3-D flyby animation/technical software used for conceptual design/renderings.

PBK-WLC utilizes the most efficient, technologically advanced Building Information Modeling software to convey design intent to our clients. This software is inclusive of Revit, AutoCAD, SketchUp, and Rhinoceros, along with Lumion, Vray, and Enscape for virtual reality client demonstrations. We also utilize 360-degree photography to aid ourselves, as well as our clients and multi-disciplinary partners, in site assessment, design, planning, and programming.

Our project teams are also familiar with scheduling software such as Primavera (P6) and our cost estimators utilize Navisworks and other essential financial software in producing the most competitive, reliable bids. We also regularly use Bluebeam for every project, especially when coordinating with DSA during Electronic Plan Review. Firm-wide, PBK-WLC utilizes multiple CRM databases including Salesforce and Deltek Vision and has also collaborated with project owners, contractors, and subcontractors with project management software such as Procore, Raken, and others.

**CAD Capabilities**: Electronic design media that supports the PBK-WLC design studio includes AutoCAD, Revit Building Information Modeling (BIM), Max Design, Sketchup, and Animator. By using appropriate computer applications, PBK-WLC employs powerful technical tools, and uses three-dimensional computer-generated models to simulate design proposals for comparison and evaluation. Technical drawing libraries, cost estimating, and specification systems interface together to form a sophisticated relational database, constantly updated with evaluation gained from recently completed projects. The project team is equally supported through PBK-WLC’s website and interactive computer support services. Construction documents are produced in digital format—resulting in superior accuracy and coordination.

**Multi-Disciplinary Design & BIM Technology**: In the year 2021, the need for multi-disciplinary coordination for complex projects is at an all-time high. At PBK-WLC, we believe in blending goals, objectives, and initiatives with our consulting engineers and building partners. Our team members are encouraged to understand the functions of the other disciplines through software such as BIM and our information management systems which are systematically proven to promote information gathering, review, and shared reporting while enhancing productivity and the quality of information being exchanged. These QC/QA systems reduce the amount of repeat work, cut unnecessary costs, remove cause for error, and eliminate common misunderstandings between firms.
iii. Cost Estimate History. Describe the firm’s cost management and estimating methodology and accuracy history.

PBK-WLC understands that designs must be cost-effective. We take cost issues very seriously and follow procedures at the beginning of the design process to ensure that the budget is accurately estimated and effectively met, especially with “design-not-to-exceed” budgets. In addition to our in-house cost and constructibility managers, we work closely with independent cost estimators, construction managers, contractors and clients to monitor cost and budget in a systematic and continuous manner.

PBK-WLC’s procedure for budgeting, cost planning, cost monitoring, and cost estimating includes:

- End of program verification, a cost model (based on budgets/historical data) establishes targets for each program element and building system throughout each phase.
- Our in-house constructibility expert will evaluate our documents periodically to assure application of best practices.
- Special emphasis on estimating the costs of alternative concepts.
- Agreed upon budget continuously monitored through computer-assisted project management programs. Costs for individual items such as HVAC systems, equipment, etc. are progressively monitored throughout each phase, using value engineering and life cycle analysis as necessary.
- In addition to the continuous reappraisal of costs, formal estimates are prepared and updated during each phase. Normal milestones include Programmatic/Concept 30, 60, 90, and 100 percent. Over the past 5 years, PBK-WLC has consistently been successful in designing within established project budgets. Approximately 83 percent of our work is from repeat clients, and PBK-WLC recognizes that in order to maintain the strong relationships we have built over the years, we must adhere to the clients’ budget requirements.

PBK-WLC’s monitoring process includes recording and forecasting project costs, comparing those costs against the authorized budget, identifying deviation, and taking appropriate corrective action. Budgets are established either by our own in-house estimators, using quotations received from our resources in the construction industry, or by independent cost estimators.

Owner “scope creep” during a project is the number one reason for projects going out of budget. We are cognizant of this and will monitor change requests. We carefully evaluate each potential scope change for impact on cost performance. We keep our clients notified of both potential cost increases and cost savings and jointly determine the desired course of action to produce the most cost-effective solutions.

Value Engineering. PBK-WLC is devoted to the principles of quality. The design and engineering professionals at PBK-WLC use the latest methods of continuous value engineering in every project design we produce. As a firm, we practice what we have termed “Value Management,” a proactive approach that uses alternate models from day one of the design process in order to achieve designs that are value added throughout the process for our clients. Simply put, our approach is proactive from the onset of the project.

With average owner savings adding up to approximately 5 to 10 percent on costs related to overall construction, we have found it best for our customers not to overlook the process of exploring multiple alternatives in order to select the optimum solution for building designs. Life cycle costing, considered to be a valuable tool in the value engineering process, has also produced results that have saved owners an additional 5 to 10 percent on follow-up costs.
The Life Cycle Costing Process at PBK-WLC involves the financial assessment of multiple design alternatives considering all significant costs of ownership over the economic life of each alternative, expressed in equivalent dollars.

a. Identify the methods the firm will use to ensure cost/budget controls during preparation of the plans and specifications.

We maintain an internal cost database populated by our recent projects and knowledge to produce our own cost estimating. We also maintain a close working relationship with many local contractors, subcontractors, and material suppliers to keep abreast of current prices and market trends. We regularly review our database of costs and update accordingly, utilizing outside cost-estimating services and local contractors to verify anticipated construction costs as needed.

During schematic design, probable cost of construction figures are usually based on current costs per square foot to get an idea of the overall budget, using current prices that are bid on similar facilities in the area. At the design development phase, a more detailed take-off allows for a more accurate probable cost of construction. The consulting engineers provide their cost figures at this stage. Preliminary construction documents provided at both the 50 percent and 90 percent stage again allow for adjustments prior to the issuance of final documents.

During the bid phase, our team is aggressive in encouraging many local contractors, subcontractors and material suppliers to bid the project. Or, if the project has been determined to be Construction Manager at Risk, then frequent collaboration and sharing of drawings with the CM team allows our team to stay on target.

b. Provide the cost per square foot for one of the firm’s K-12 new construction projects that was bid within the last year (with a minimum project cost of $3,000,000). Include the project name, school district, and bid date. Clarify if cost per square foot includes site work.

<table>
<thead>
<tr>
<th>OXNARD UNION HIGH SCHOOL DISTRICT</th>
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</thead>
<tbody>
<tr>
<td>Project: Del Sol High School</td>
</tr>
<tr>
<td>Bid Date: 2020</td>
</tr>
<tr>
<td>Bid Amount: $234,102,578</td>
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<tr>
<td>Cost Per Square Foot: $821</td>
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<thead>
<tr>
<th>MUROC JOINT UNIFIED SCHOOL DISTRICT</th>
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</thead>
<tbody>
<tr>
<td>Project: Bailey/Branch Elementary School</td>
</tr>
<tr>
<td>PBK-WLC Cost Estimate: $54,041,712.00</td>
</tr>
<tr>
<td>Actual Bid Amount: $55,725,906.50 (2018)</td>
</tr>
<tr>
<td>% Difference: 3.01% ($1,684,194.50)</td>
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</tbody>
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<thead>
<tr>
<th>CENTINELA VALLEY UNION HIGH SCHOOL DISTRICT</th>
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</thead>
<tbody>
<tr>
<td>Project: Hawthorne High School - Phase II</td>
</tr>
<tr>
<td>PBK-WLC Cost Estimate: $46,871,542.00 (2016)</td>
</tr>
<tr>
<td>Actual Bid Amount: $42,841,973.00</td>
</tr>
<tr>
<td>% Difference: -9.2% ($4,029,569.00)</td>
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<tr>
<th>JURUPA UNIFIED SCHOOL DISTRICT</th>
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<tbody>
<tr>
<td>Project: F.C. Joyce ES/Del Sol Academy K-8 School</td>
</tr>
<tr>
<td>PBK-WLC Cost Estimate: $3,500,000.00</td>
</tr>
<tr>
<td>Actual Bid Amount: $3,738,199.00 (2021)</td>
</tr>
<tr>
<td>% Difference: .065% ($238,199.00)</td>
</tr>
</tbody>
</table>
iv. Firm Change Order History. Describe the project management procedures and approach to construction problems employed by your firm to minimize change orders.

**Change Orders:** During construction, the first line of defense against change orders is a well-coordinated, technically accurate set of design and construction documents. To support this effort, processes are implemented as part of the project work plan that ensure all the right questions are asked as early as possible with client user groups for definition of scope, consultants for selection of appropriate building systems, and contractors for input on cost and constructability issues. This early definition is instrumental in defining proper design and construction budgets, as well as contingency budgets to address the unforeseeable unknowns that are likely to occur.

**Review of Change Orders:** The best way to diminish change orders is with quality construction documents. The documents need to clearly define the scope of work and provide constructible solutions. PBK-WLC then uses internal check systems and peer reviews to make sure that our documents are accurate and error free. Weekly coordination meetings with our consultants are established in the design phase of our projects. If a cost impact arises, the general contractor will submit a change proposal to the project manager. The change proposal must include a description along with detailed labor and material breakdown. No items will be considered for change order without this written documentation.

a. For two (2) past additive change orders for projects that were bid within the last two (2) years, one initiated by the design firm and one initiated by the contractor, identify the total dollar amount of change orders compared to the original contract amount and indicate the percent increase. Include the project name, school district, completion date, and any written explanation.

### INITIATED BY DESIGN FIRM:

**EDGEWOOD HIGH SCHOOL EVENT CENTER**
WEST COVINA USD - COMPLETED 2020

| Contract Amount: | $4,995,288.68 |
| Total Change Orders: | $259,400.70 (4.9% of Contract) |
| Client Change Orders: | $231,544.00 (4.4% of Contract) |
| PBK-WLC: | $27,856.00 (0.5% of Contract) |

### INITIATED BY CONTRACTOR:

**COLTON HIGH SCHOOL SPORTS STADIUM ADDITION & MODERNIZATION**
COLTON JOINT USD - COMPLETED 2019

| Contract Amount: | $11,660,849.40 |
| Total Change Orders: | $130,307.90 (1.1% of Contract) |
| Client Change Orders: | $48,191.05 (0.4% of Contract) |
| PBK-WLC: | $82,116.85 (0.7% of Contract) |

### DESIGNING TO YOUR BUDGET

PBK-WLC is keenly aware of school district challenges and community accountability related to construction projects and facility expenditures. We will proactively work with Newport-Mesa USD to minimize maintenance and operational expenses; provide cost-effective designs that maximize building program accomplishments and educational objectives; and develop options and priorities within the project to assure budget adherence.
STATEMENT OF QUALIFICATIONS FOR PBK-WLC FOR ARCHITECTURAL SERVICES IN
RESPONSE TO NEWPORT-MESA UNIFIED SCHOOL DISTRICT RFQ #107-22

Sub Consultants

MEP+T IN-HOUSE CONSULTANT:

LEAF Engineers [a PBK-WLC company]
600 Anton Boulevard, Suite 1375
Costa Mesa, CA 92626
(949) 548-5000

LANDSCAPE ARCHITECTS

Integrated Design Group (IDG)
1308 Monte Vista Avenue, Suite 6
Upland, CA 91786-8224
(909) 946-6400

STRUCTURAL ENGINEERS

Michael Baker International
5 Hutton Centre Drive, Suite 500
Santa Ana, CA 92707
(949) 472-3505

FOOD SERVICE

Kinein Foodservice Design
13772 Bewley Street
Garden Grove, CA 92843
(562) 665-2076

CIVIL ENGINEERS

Michael Baker International
5 Hutton Centre Drive, Suite 500
Santa Ana, CA 92707
(949) 472-3505

LAKELAND ELEMENTARY SCHOOL
IN-HOUSE RESOURCES

M/E/P+T ENGINEERING

LEAF Engineers [a PBK Company] provides integrated mechanical, electrical, plumbing, safety and security, and technology engineering design services to create high-performance, cost effective environments that prioritize eco-friendly operations. LEAF provides services through any stage of a project – from feasibility studies to full design and construction services. We design systems for new developments, and provide assessments and analysis for existing facilities. We also provide on-site and post occupancy services during construction administration, such as measurement verification and building commissioning.

BUILDING ENVELOPE & ASSET MANAGEMENT

BEAM Professionals [a PBK Company] has more than 30 years of experience in the design and maintenance of exterior building envelope components for K-12, higher education, municipalities, corporate + commercial, and sports clientele. We ensure proper design, construction, and coordination between various building envelope components. Our services assist in preventing water and air from penetrating the building envelope, as well as moisture condensation within. This ensures that each system is addressed in respect to material durability, system maintenance, thermal performance, moisture/air protection, and code compliance.

SAFETY AND SECURITY

PBK-REDi is a partnership that focuses on keeping schools safe. Our team has established a national leadership position in pioneering environmental design applications that maximize safety and security for school facility occupants through facilities vulnerability assessments, board policy creation, and student/staff training. Our aim is to empower stakeholders with a guide to best practices in keeping students and teachers safe in their learning environments. These design applications are primarily aimed at educators and school board members charged with safeguarding students and staff, but they will also be useful to community stakeholders, security officials, and elected officials.

SAFETY AND SECURITY

PBK Sports [a division of PBK] is a multi-discipline group of architects and engineers that specializes in providing expert programming, design and construction administration services specifically for sports facilities. We assume a collaborative approach that seeks to enhance student/athlete performance, as well as spectator experience. Our work is delivered with platinum-level customer service and we have a proven track record of providing clients with the best possible service on every project we touch.
References

Provide a minimum of three (3) K-12 school district references:

**ABC Unified School District**
- Reference: Ryan Carter
- Title: Bond Program Manager
- Contact: (562) 926-5566 Ext. 21376

**Central School District**
- Reference: Lori L. Isom
- Title: Assistant Superintendent, Business Services
- Contact: (909) 989-8541

**Capistrano Unified School District**
- Reference: John Forney
- Title: Chief Facilities Officer
- Contact: (949) 234-9200

![Redbud Elementary School Media Center](image)
Legal Issues

i. Is there now pending any legal action against the firm or any employee of the firm alleging violations of the law in connection with an offering of municipal securities in a California transaction? If so, please describe such pending action.
Answer: No

ii. Have there been any settlements or judgments involving such actions within the last five (5) years? Please describe each such settlement or judgment, including the nature of the action and the amount of recovery.
Answer: No

iii. Please list and describe any judgment, settlement, or arbitration award valued at $5,000 or greater relating to a civil action judgment, settlement, arbitration award, or administrative action for any individual licensee, as required to be reported to the state architect’s board under Business & Professions Code section 5588.
Answer: None
WHY PBK-WLC?

Our client focused, passion driven philosophy is founded on and inspired by the experience of your students, staff, and community. Transforming client aspirations into architectural form, we aim to create positive change in people’s lives and the communities we also serve.