

# STANDARD QUALIFICATIONS

Prepared By:  
Capital Program Management, Inc.

1851 HERITAGE LANE, SUITE 210  
SACRAMENTO, CA 95815  
JULY 2021



## TABLE OF CONTENTS

Section	Page
I. Company Background.....	2
II. Business Organization.....	3
III. Professional Services.....	5
IV. Experience.....	8
V. Project / Program Highlights.....	14
VI. Testimonials.....	19
VII. References.....	20

# I. COMPANY BACKGROUND

## Capital Program Management, Incorporated (CPM)

Website: [www.capitalpm.com](http://www.capitalpm.com)

### Legal Name

Capital Program Management, Incorporated



### CPM Offices

#### Sacramento Headquarters

1851 Heritage Lane, Suite 210  
Sacramento, CA 95815  
Phone: 916.553.4400  
Fax: 916.553.4200

#### San Diego

1161 Law Street  
San Diego, CA 92109  
Phone: 916.553.4400

### CPM Principals

Mark Rosson, President	<a href="mailto:mark@capitalpm.com">mark@capitalpm.com</a>
Mike Wassermann, Vice President	<a href="mailto:mike@capitalpm.com">mike@capitalpm.com</a>
Wallace E. Browe, Principal	<a href="mailto:wally@capitalpm.com">wally@capitalpm.com</a>
Tim Doane, CFO/Principal	<a href="mailto:timd@capitalpm.com">timd@capitalpm.com</a>
Steven McGuckin, Principal	<a href="mailto:stevenm@capitalpm.com">stevenm@capitalpm.com</a>

### CPM Associate Partners

Tracy Nishihira	<a href="mailto:tracyn@capitalpm.com">tracyn@capitalpm.com</a>
Susan Lockington	<a href="mailto:suel@capitalpm.com">suel@capitalpm.com</a>
Windy Buller	<a href="mailto:windyb@capitalpm.com">windyb@capitalpm.com</a>
Sharon Thomas	<a href="mailto:sharont@capitalpm.com">sharont@capitalpm.com</a>

### CPM Background

CPM, a privately owned firm, was founded in 1999 by four individuals who share over 80 years of combined program and construction project management experience serving public and private sector clients. CPM employs 27 individuals in 2 offices, including 5 principals, and 4 associate principals; all experienced in the management of public agency capital outlay programs.

CPM specializes as an Owner's Representative in planning and executing capital improvement projects for clients including California public K-12 school districts, Cities, Counties, and Healthcare. CPM's services range from program-wide management to our discrete specialty services such as: comprehensive project and program budget management including cash flow analysis, construction management, education technology (Ed-Tech) planning and implementation, preparation of performance audits, and facility design standards / master specifications.

CPM comprises four integrated practices to support its clients' consulting needs, including:

- The original planning and **program / project management practice**, is rooted in California K-12 school and community college districts, with educational and institutional facility projects of all types, including master planning.
- The **construction management practice**, with a combined experience of over 50+ years, CPM provides these services and ensures that each project is delivered with the highest quality of management expertise; on time, within budget and safely, with minimal disruption to Students and Staff.
- The **budget and accounting practice**, started in early 2000 in response to a large client's need for forensic accounting, budgeting, budget and expenditure tracking, and reporting to its Board and Citizens' Oversight Committee. This practice serves our clients with combined capital outlay budgets of nearly two billion dollars. In its history, the practice has accounted for several billion dollars of capital outlay expenditures.
- The **technology practice** started in 2002 in response to a client's need for unbiased (i.e., non-vendor connected) third party consulting on its building technology systems. This practice supports our clients' design and project management needs in the eight common low voltage systems and several other not-so-common found in modern learning facilities.

## II. BUSINESS ORGANIZATION

The following explanation represents the three business practices that comprise CPM:

### • *PROGRAM MANAGEMENT*

Program Management involves multiple projects; it is the development of a comprehensive program for the design, development and implementation of small and large-scale multi-project facilities programs, generally occurring over several years or longer. Program management services may include:

- Consultant Selection
- Condition assessments
- Site investigation and condition assessments
- Facility Design Standards
- Facilities master planning
- California Clean Energy Jobs Act - Prop 39 Planning Services
- Implementation planning
- Master program schedule
- Project prioritization
- Management information system

### • *PROJECT MANAGEMENT*

Project Management encompasses the life of the project; it is the professional management of a single project from the planning and design phase through closeout and occupancy. Project management services may include:

- Project definition
- Developing a realistic and complete budget
- Out-to-Bid / Award Phase Coordination
- Schedule of planning and design activities
- Management information system
- Schedule and quality control
- Review of documents for coordination and constructability

### • *CONSTRUCTION MANAGEMENT*

Construction management is the management of the out-to-bid and award through construction and close-out phases of a project. As the District's representative during construction, CPM provides value by ensuring that each project is delivered with the highest quality of management expertise; on time, within budget and safely, with minimal disruption.

A summary list of these services may include:

- Review delivery methods and assign for each project
- Budget and Cost Tracking
- Construction Administration Duties
- Punchlist Coordination
- Staff Training and Commissioning Coordination

- *TECHNOLOGY PLANNING AND IMPLEMENTATION*

Implementation of new technology usually succeeds or fails based not on the quality of the technology itself, but rather on the quality of forethought and planning around the actual use of the technology.

For example, when constructing or modernizing facilities, the right technology can greatly complement and enhance experience. For a District project, properly conceived technology can make the jobs of District personnel easier and more efficient.

Our Technology Planning and Implementation Practice brings the facility's key users and IT staff together to develop a master plan and an implementation road map that best meets our clients' operational objectives, support capacity, and program budget.

Technology planning services may include:

- Establishing client goals
- Assessing current technology infrastructure
- Creating an integrated program schedule, budget and funding plan
- Developing training, equipment and service standards
- Establishing support team roles and responsibilities
- Technology implementation services may include:
  - Developing a specific execution plan
  - Designing, procuring, and delivering new technology infrastructure

- *BUDGET AND ACCOUNTING*

CPM specializes in developing and monitoring project and program budgets, we have provided this service for all capital outlay work. We work in assembling various project budgets into a coherent whole by identifying both hard and soft cost components for each type of project in the program, and then fitting them into a program budget which includes escalation, appropriate contingencies, and generates cash flow to properly inform the Client on a regular basis. With this program budget in place, supported by its component parts, Clients will be able to quickly make modifications and model the effect of changes in schedule priority of the various projects. It will also serve as the basis later to set up a budget tracking system for the program. All costs and expenditures will be tracked accordingly.

A summary list of these services may include:

- Confirm Schedule and Cash Flow Analysis
- Prepare Individual Project Budgets
- Prepare Master Program Budget
- Calculate Escalation
- Assignment of Appropriate Contingencies and Allowances
- Invoice Due Diligence
- Reconciliation of County Facility Accounting Systems
- Program Budget and Budget Control System

### III. PROFESSIONAL SERVICES

- *ON-CALL PROJECT / PROGRAM MANAGEMENT RESOURCE*

Provide various program management services on an “on-call” basis. Services include performing constructability reviews, establishing district-wide design standards, taking the lead in the blind bid opening process, and guiding Districts through the delivery method selection process and the resulting request for qualifications/proposals, evaluation, interview and selection process.

- *TECHNOLOGY PLANNING AND IMPLEMENTATION*

Implementation of new technology usually succeeds or fails based not on the quality of the technology itself, but rather on the quality of forethought and planning around the actual use of the technology.

For example, when constructing or modernizing educational facilities, the right technology can greatly complement curriculum and enhance the learning experience. In a healthcare project, properly conceived technology can make the jobs of the medical personnel easier and more efficient.

Our Technology Planning and Implementation Practice brings the facility’s key users and IT staff together to develop a master plan and an implementation road map that best meets our clients’ operational objectives, support capacity, and program budget.

Technology planning services may include:

- Establishing client goals
- Assessing current technology infrastructure
- Creating an integrated program schedule, budget and funding plan
- Developing training, equipment and service standards
- Establishing support team roles and responsibilities

Technology implementation services may include:

- Developing a specific execution plan
- Designing, procuring, and delivering new technology infrastructure

- *TECHNOLOGY INTEGRATION PLANNING*

Assist clients with a strategic plan to better integrate technology for the purpose of supporting curriculum and fostering fundamentally different ways of teaching and learning. Strategies include the collaboration of the client’s curriculum, facilities, network infrastructure, hardware and software, staff, students and community to create an ideal learning environment.

- *BUDGET AND ACCOUNTING*

Research and development of budgets at the level of individual projects, as well as the entire capital outlay program. Assignment of appropriate contingencies and allowances for cost escalation and other unforeseen eventualities.

Implementation of a system for tracking all budgets and expenditures associated with both individual projects and the overall program. Development of appropriate interface with agency fiscal accounting system. Development of reports for management, governing boards, oversight committees, and outside auditors.

- *LOCAL BOND PLANNING*

A broad category, which could include evaluation of need, appropriate budgeting, scope prioritization, and development of technical materials and information to support bond campaigns.

- *STRATEGIC PLANNING*

Analyzing client's goals with respect to renovation and new construction, including anticipated growth and funding eligibility. Developing, analyzing, and comparing various long-range strategies for financing and implementing a capital outlay program. Examples might include analyzing short and long-term cash flow needs, projecting impact of inflation vs. interest cost in timing of projects, and comparison of renovation vs. new construction, etc.

- *CONDITION ASSESSMENT/NEEDS ANALYSIS*

Examination of existing facilities and evaluation of their condition; comparison of space needs to space available, and assessment of programmatic requirements. Estimating cost to repair/renovate/reconfigure existing space for desired use.

- *FACILITY MASTER PLANNING*

Analyze facilities condition assessments, demographic information and growth projections. Meet with City, County, Developers and other agencies that may have influence or impacts to our client's facilities. Study planned developments that may produce impacts to existing and future projects. Formulate design committees with stakeholders and conduct design charrettes. Facilitate community and staff meetings to create and explore all possible options and viability of those options to yield the best possible facility master plan. Analyze results from meetings and formulate a written report with findings and development of the facilities master plan.

- *IPD/LEAN FACILITATION*

Imagine a project being able to be built without delays, without claims, ahead of schedule and under budget. This is our vision, our goal and our clients' reality. CPM's objective during construction is to have our clients realize the benefits of appropriate planning, management, and leadership. The key to a successful project is really quite simple, "begin with an end in mind". Utilization of contract types such as Lease-Leaseback (L-LB), and new management techniques are now finding a place in our industry. They are Integrated Project Delivery (IPD) and Lean Construction Principles – we refer to them as forms of "relational contracting". We have nationally recognized individuals within CPM that regularly facilitate project team members from an Owner's Representative perspective in these techniques and management philosophies. With the proper approach and planning tools that will not only reduce the risk or "exposure" to a project, but this will ultimately improve the overall outcome of a capital outlay program as a whole.

- *IMPLEMENTATION PLANS*

Preparation of a plan to guide the execution of a capital outlay program over its duration. Incorporates results from master planning and needs assessment, and includes scope, budget, and schedule development. The resulting document acts as a "roadmap" to guide the efforts of design teams, construction teams, owner staff, and other consultants throughout the program.

- *FACILITY DESIGN STANDARDS AND MASTER SPECIFICATIONS*

Development of program-wide product system, design and document standards to conform design team's work to a uniform standard. Development and maintenance of master specifications to conform the construction contracts to a uniform standard of materials, system operations, and installation techniques.

- *PROJECT SCOPE DEVELOPMENT*

Identification and adoption of priorities to guide spending, followed by assessment of needs and development of appropriate scopes of work and building program for individual projects following the priorities and budget constraints.

- *DELIVERY METHOD OPTIONS*

Determine the “best fit” delivery method for each type of project. Consideration can include conventional Design-Bid-Build, CM Owner/Agent (single prime or multi-prime), CM At-Risk, Lease-Leaseback, and Design-Build delivery models.

- *BRIDGING ARCHITECT*

CPM is also uniquely qualified in the preparation of performance specifications and function in the role of the “Bridging” architect for projects utilizing the design-build delivery method.

- *SELECTION AND COORDINATION OF CONSULTANTS*

Preparation of Requests for Qualifications, assistance in paper screening and interviewing, and development of scopes of work for consultant teams. Recommendations of appropriate consultants for various types of projects. Assistance with development of appropriate agreements for consultant services, including design team along with other consultants, and negotiation of their terms. Administration of consultant contracts (e.g., payment approvals, progress tracking).

- *CONSTRUCTABILITY REVIEWS*

Review plans and specifications during development and prior to bid for compliance to design programmatic requirements, client’s standards, interdisciplinary coordination, and errors and omissions. Back-check plans and specifications with A-E to ensure that all items have been properly addressed to produce accurate bids, minimize change orders, construction delays and claims.

- *PROGRAM AND PROJECT BUDGETING*

Research and development of budgets at the level of individual projects as well as the entire capital outlay program. Assignment of appropriate contingencies and allowances for cost escalation and other unforeseen eventualities.

- *BUDGET & COST TRACKING*

Implementation of CPM’s database system for tracking all budgets and expenditures associated with both individual projects and the overall program. Development of appropriate interface with the agency’s fiscal accounting system. Development of reports for management, governing boards, oversight committees, and outside auditors.

*“We have been incredibly pleased with CPM. They have proven to be a true partner in our bond projects and frequently go above and beyond to help us get the job done.”*

- Charles Miller, Superintendent  
John Swett Unified School District



## IV. EXPERIENCE

### *VACAVILLE UNIFIED SCHOOL DISTRICT, SOLANO COUNTY*

CPM began working for the District in 2001 in preparation for a \$196 million local new construction and modernization bond, Measure V. The District hired CPM to review program and project budgets and schedules, and to help bring a realistic, credible plan for capital outlay expenditures to the voters. After the bond passed, CPM was awarded contracts to provide program management, including strategic planning, monitoring and tracking of program and project budgets, reporting to the Citizens' Oversight Committee, developing design standards and project management of design phase through bid and award.

CPM was chosen once again as the District's Program Manager for its new Measure A Bond Program that was passed in November 2014 for \$194M and is currently in the process of planning and implementation of various new construction and modernization projects.

### *CENTER UNIFIED SCHOOL DISTRICT, SACRAMENTO AND PLACER COUNTIES*

CPM was originally selected as project manager and Owner's Representative for the \$35 million Wilson C. Riles Junior High School. In this role, CPM developed and coordinated the CM At-Risk project-delivery selection process, assisted with the bid-award-start phase of the project, budget tracking and ongoing Owner representation through the duration of the project. CPM has begun the design phase management, including the architect selection process, for four (4) modernization projects and their new Rex Fortune Elementary School. CPM developed the first master program budget for the District that included the calculation of construction cost escalation, catastrophic loss reserve, and future interest earnings through the preparation of cash flow reports. Exercises were performed in anticipation of related project and program budget development for the District's Board as part of their local bond planning.

### *DRY CREEK JOINT ELEMENTARY SCHOOL DISTRICT, PLACER COUNTY*

Following the passage of its \$67.3 million Measure E General Obligation bond in early 2008, Dry Creek subsequently contracted with CPM's Technology practice to provide a Technology Master Plan following the obligation of the bond to provide for "digital classrooms" at selected campuses throughout the District. The District needed guidance in defining, budgeting and planning for "digital classrooms" of the future. CPM led a collaborative group of curriculum, IT, facility and maintenance staff, administrative staff, support staff and technical staff in working toward a unique phased approach of technology integration through curriculum driven design and implementation. Following master schedule planning, assessment of existing infrastructure and data network systems, CPM assisted the District through implementation and project management. CPM also provided presentation and financial reporting to the COC.

### *ELVERTA JOINT ELEMENTARY SCHOOL DISTRICT, SACRAMENTO COUNTY*

CPM first began working with the Elverta Joint Elementary School District (EJESD) in 2010 to provide on-call project management services. One such project was a Septic System Upgrade project for the Elverta Elementary School campus. Due to the critical nature of the situation presenting unsafe conditions that could potentially threaten the safety of students, staff, and district property, CPM successfully prosecuted this project under an Emergency Resolution basis approved by the Board.

In 2014, CPM engaged with the District once again to perform a feasibility study for a Roofing Removal and Replacement project and a Courtyard Paving project at the Elverta Elementary School. CPM conducted preliminary on-site condition assessments, provided corresponding construction estimates, prepared overall project budgets and met with District staff to review the projects and projected budgets. Additionally, CPM successfully obtained funding approval for the District's Energy Expenditure Plan in March of 2015 for the Proposition 39 – California Clean Energy Jobs Act. A portion of the Prop 39 funding helped pay for part of the Roofing Removal and Replacement project, by adding thermal roof insulation where none had originally existed. Both projects came in under budget, and by folding in the Prop 39 funding, CPM was successful in assisting the District in making their General Fund and Deferred Maintenance funds go further for the 2015/16 fiscal year, which was very much appreciated.

### *LODI UNIFIED SCHOOL DISTRICT, LODI, CA*

CPM was hired as one of the Construction Management firms to provide professional services for the District's \$281 million Measure U Bond Program. The first project assignment was the construction of the District's new M&O Building utilizing the Design-Build delivery method. This project is part of the District's overall Master Plan to move the existing M&O facility off of the north end of the Lodi High School campus so it can be expanded and renovated. Responsibilities include managing the Design-Build Entity (DBE) selection process, and contract award. With design-build, fulfilling the duties as the Owner's Representative to provide oversight of the design process in concert with the Criteria Documents architectural firm through project completion in July 2020. CPM is also overseeing five (5) Fire Alarm Upgrade projects and twelve (12) Paving Upgrade projects. All of these projects have compressed construction schedules for work to be completed over the summer months, and the fire alarm upgrade for Bear Creek High School will utilize a split-shift approach with work being completed after hours until the new system can be completed and brought online over the Winter break.

### *HILLSBOROUGH CITY SCHOOL DISTRICT, SAN MATEO COUNTY*

CPM (program manager) and McCarthy (construction manager) teamed together to provide complete program management services for the District's \$67 million local bond program of new construction and renovation. The District hired the CPM / McCarthy team as its program manager to assist with the planning and implementation of the entire construction program. Initial services included revisiting and refining the master plan, providing strategic planning, conducting condition assessments, establishing project priorities, analyzing cash flow, developing a program schedule, determining project budgets and compiling this plan. Also included were the development of District design standards and outline specifications, procurement of design services and design phase management through bid and award. During construction phase, our scope included monitoring and tracking of program cash flow, program and project budgets and assisting with the governmental agencies project closeout.

### *WOODSIDE ELEMENTARY SCHOOL DISTRICT, SAN MATEO COUNTY*

CPM was selected by the WESD to be their owner's representative to plan, manage and oversee the implementation of their \$13.5M measure D Bond program, plus a \$5M capital campaign for a total of \$18.5M. Our work included condition assessments, community meetings, master planning, development of program budgets, schedule planning, logistical planning, and prioritization of schedule and scope. In addition, CPM was to oversee the execution of the implementation plan that included Board reports, Citizens' Oversight Committee reporting, professional services selection and contract negotiations, oversight and coordination of design professionals, oversight of the construction management team, tracking all program expenditures, assisting with problems that may arise during the construction phase, furniture and equipment procurement and coordinating owner moving logistics. In summary, our on-call services included the development of District design standards and outline specifications, develop and maintain project budgets, develop and maintain project schedules, assist with the review and approval of consultant invoices, pay applications, assist with the governmental agencies, and project closeouts with DSA.

### *WOODSIDE PORTOLA VALLEY FIRE PROTECTION DISTRICT FOUNDATION, SAN MATEO COUNTY*

Capital Program Management was selected by the WPVFPDF to be their owner's representative to plan, manage, and oversee the implementation of their \$16.8 million program based on recommendations from the Woodside Elementary School Board. The program includes replacement of an existing fire station and renovations to another station to bring all their facilities up to current standards. CPM's work included condition assessments, budget development, implementation planning, feasibility studies for evaluation of existing and alternative sites, coordination with the Town of Woodside Planning Department for entitlements, public review, and CEQA studies. In addition, CPM coordinated with the foundations counsel on entitlements, contracts, and alternative project delivery methods. Since this program is being partially funded through a Capital Campaign, CPM coordinated the needs of the campaign, communication planning, and community outreach.

### *SAN DIEGO COUNTY OFFICE OF EDUCATION, SAN DIEGO COUNTY*

CPM has been retained by the Educational Facility Solutions Group to provide “on-call” Professional School/Facilities Planning Consulting Services. The scope and types of deliverables will be determined on a case by case basis and issued in a Work Authorization format. Our first task on behalf of the Technology Services Department was to critique its Technology Plan with the Boards goal to improve the standards for uniform technologies, both hardware and software, which are deployed to the general workforce. A subsequent task was to review and provide input for the Project Requirements and Standard Performance Specifications for the Lakeside Unified School District. CPM is poised to be able to assist with any number of our discrete planning, project management, and educational-technology implementation types of services as an adjunct to their staff, as the needs arise.

### *SOLANO COUNTY OFFICE OF EDUCATION, SOLANO COUNTY*

CPM was retained by the Solano County Office of Education to provide project management services for the \$4.7M Golden Hills Education Center. The scope consisted of assisting the Owner with the A-E selection process, working with the County’s legal counsel in preparing the contracts, and contract negotiations. In addition, CPM also assisted the County with developing project budgets, preliminary project schedules, implementation of educational technology, and is poised to provide other “on-call” project management services as the needs arise.

### *LAFAYETTE SCHOOL DISTRICT, CONTRA COSTA COUNTY*

A \$69 Million Bond Program, CPM was hired by the District to implement a Master Program Workbook (MPW), a comprehensive multi-worksheet Excel Workbook used to track project budgets, expenditures and contracts for small to medium size Bond Programs. CPM’s director of budget and accounting, Tim Doane, worked with the Director of Facilities developing initial project budgets, preparing cash flow scenarios based on construction schedules and overseeing the day to day financial operations of the Bond Program. Tim was also responsible for designing data export/import routines to facilitate the sharing of financial data between the District’s fiscal accounting system and the Master Program Workbook and assisting staff with the reconciliation of expenditures and fund balance.

### *LONG BEACH UNIFIED SCHOOL DISTRICT, LOS ANGELES COUNTY*

CPM was selected by the district to provide overall program management services for its \$1.2+ Billion Measure K capital outlay program. A major emphasis has been placed on financial controls with the development of a Bond Program Management Plan, Bond Program Implementation Guidance Document, Master Program Schedule, Funding/Fiscal Plan (including Master Program Budget, Revenues and Cash Flow Projection, Project Priority Recommendations, Communications Plan, COC and Measure K Audits Assistance, Current Project Owner Assistance, Accounting Systems Integration, Measure A Expenditures Review, and Technology Implementation Planning).

### *BONITA UNIFIED SCHOOL DISTRICT, LOS ANGELES COUNTY*

Following passage of its \$56.4 million Measure C General Obligation bond in March 2004, the District later hired CPM to guide the work in its \$90 million capital outlay program. Bonita USD’s program now exceeds \$173.5M with the passage of Measure AB in 2008. CPM developed a program implementation strategy for that involved eight (8) key steps: prioritization of work, identification of funding, detailed scope of work development, budget development, schedule development, project controls and reporting, design standards, and guiding the project delivery method selection process. The development of a roadmap for the build-out of the program over the next several years was a key ingredient to the success of the Bonita program. Additionally, CPM provided on-going owner representation, design phase management, out-to-bid/award functions and budget-management expenditure tracking, and quarterly COC reporting for each bond measure through 2019.

*JOHN SWETT UNIFIED SCHOOL DISTRICT, CONTRA COSTA COUNTY*

\$63 Million dual Bond Program. CPM was selected for the implementation of our Master Program Workbook (MPW), a comprehensive multi-worksheet Excel Workbook used to track project budgets, expenditures and contracts for District's Bond Programs. Responsibilities included working with the Director of Facilities and the District's Program Manager developing initial program and project budgets, customization of the MPW to incorporate District account codes, vendors and funding sources, training staff on the use of the MPW and oversee the implementation of protocols and procedures to ensure efficient document and audit controls. Other responsibilities included assisting the preparing the annual Work-In-Progress report for the auditors and designing data export/import routines to facilitate the sharing of financial data between the District's fiscal accounting system and the Master Program Workbook and assisting staff with the reconciliation of expenditures and fund balance.

*WALNUT CREEK UNIFIED SCHOOL DISTRICT, CONTRA COSTA COUNTY*

\$60 Million Bond Program. CPM was selected for the implementation of CPM's Master Program Workbook (MPW), a comprehensive multi-worksheet Excel Workbook used to track project budgets, expenditures and contracts for District's Bond Programs. Responsibilities include working with the Director of Facilities and Chief Business Officer developing initial program and project budgets reflected in the Facilities Master Plan, customization of the MPW to incorporate District account codes, vendors and funding sources, training staff on the use of the MPW and oversee the implementation of protocols and procedures to ensure efficient document and audit controls. Other responsibilities include entering expenditure data and associated budget revisions into the MPW, reconciliation of the MPW with the District's accounting system and preparation of the financial reports for the Citizens Bond Oversight Committee. Also assist in the preparation of the annual fiscal budget for the Bond Fund.

*MARTINEZ UNIFIED SCHOOL DISTRICT, CONTRA COSTA COUNTY*

\$52 Million Bond Program. Responsible for the implementation of CPM's Master Program Workbook (MPW) to assist the District with analyzing the financial status of their existing Bond Program and the managing of remaining funds. CPM worked with the Contra Costa County Office of Education (CCCOE) and the District's staff to create a data export of project expenditure information from the District's accounting system, Tyler Munis, eliminating the need to enter expenditures manually in to CPM's workbook. In addition, CPM assisted the District with reconciling expenditures, to past financial audits, periodic updates to the Master Program Workbook and balancing to remaining bond funds.

**Below in alphabetical order, is a summary list of programs that CPM has worked with:**

» Alameda County Waste Management Authority, Alameda County:	2004 - 2005
» Albany Unified School District, Alameda County:	2003 - 2009
» Archoe School District, Sacramento County:	2017 - Current
» Bassett Unified School District, Los Angeles County:	2005 - 2007
» Bonita Unified School District, San Dimas County:	2004 - 2019
» Cajon Valley Unified School District, San Diego County:	2009 - 2010
» California State Lottery, Sacramento County:	2008 - Current
» Chowchilla Union High School District, Madera County:	2005 & 2007
» Center Unified School District, Sacramento County:	2000 - Current
» Colusa Unified School District, Colusa County:	2015 - 2016
» Dixon Unified School District, Solano County:	2012 - 2013
» Dry Creek Joint Elementary School District, Placer County:	2008 - 2013 - Current
» Enloe Hospital, Butte County:	2010
» Elverta Joint Elementary School District, Sacramento County:	2010 - Current
» Fortune School of Education, Sacramento County:	2010
» FCMAT, Kern County:	2011
» Glendale Unified School District, Los Angeles County:	2011 - 2012
» Gold Oak Union School District, EL Dorado County:	2017 - Current
» Hillsborough City School District, San Mateo County:	2003 - Current
» Indian Diggings School District, El Dorado County:	2017 - Current
» John Swett Unified School District, Contra Costa County:	2017 - Current
» Lafayette School District, Contra Costa County:	2016 - Current
» Lake Elsinore Unified School District, Riverside County:	2011 - 2012
» Lammersville Elementary School District, San Joaquin County:	2001
» Latrobe School District, El Dorado County:	2017 - Current
» Lodi Unified School District, San Joaquin County:	2018 - Current
» Los Angeles Unified School District, Los Angeles County:	2010- 2011
» Long Beach Unified School District, Los Angeles County:	2009 - Current
» Los Rios Community College District, Sacramento County:	2008 - 2009
» Mariposa County Unified School District, Mariposa County:	2019 - Current
» Martinez Unified School District, Contra Costa County:	2016 - Current
» McKittrick Elementary School District, Kern County:	2014 - 2017
» Mt. Diablo Unified School District, Contra Costa County:	2014 - Current
» Mt. San Jacinto Community College District, Riverside County:	2015 - 2016
» Natomas Charter School, Sacramento County:	2015 - Current
» Natomas Unified School District, Sacramento County:	2015 - 2016
» New Haven Unified School District, Alameda County:	2015 - 2017
» Newport-Mesa Unified School District, Orange County:	2001 - 2002
» North Sacramento School District, Sacramento County:	2003 - 2007
» Oakland Unified School District, Alameda County:	2000 - 2003
» Oroville City Elementary School District, Butte County:	2004
» Pacific Grove Unified School District, Monterey County:	2007
» Piedmont Unified School District, Alameda County:	2006
» Pioneer Unified School District, El Dorado County:	2017 - Current

» Pittsburg Unified School District, Contra Costa County:	2001, 2009-2010
» Placer Union High School District, Placer County:	2000 - 2005
» Placerville Union School District, EL Dorado County:	2017 - Current
» Rancho Santiago Comm. College District, Orange County:	2014 - 2015
» Redwood City School District, San Mateo County:	2003 - 2008
» Richmond Elementary School District, Lassen County:	2018
» Riverside Unified School District, Riverside County:	2005 - 2009
» Salinas Unified School District, Jefferson County:	2003
» San Diego County Office Education, San Diego County:	2010 - Current
» San Dimas Canyon Academy, San Dimas County:	2014 - 2015
» San Juan Unified School District, Sacramento County:	1999 - 2004, 2014 - 2016
» San Mateo County Department of Housing, San Mateo County:	2019 - Current
» San Mateo County Parks Department, San Mateo County:	2019 - Current
» San Ramon Valley Unified School District, Contra Costa County:	2005 - Current
» Santa Ana Unified School District, Orange County:	2003 - 2004
» Solano County Office of Education, Solano County:	2010 - Current
» St. Helena Unified School District, Solano County:	2011 - 2013
» Tahoe-Truckee Unified School District, Placer County:	2002, 2014 - 2016
» Tracy Joint Unified School District, San Joaquin County:	2002
» Urban Charter Schools Collective, Sacramento County:	2015 - Current
» Vacaville Unified School District, Solano County:	2000 - Current
» Walnut Creek School District, Contra Costa County:	2017 - 2018
» Washington Unified School District, Yolo County:	2005 - 2008, 2021
» Woodland Joint Unified School District, Yolo County:	2005 & 2009
» Woodside Elementary School District, San Mateo County:	2014 - 2017
» Woodside Portola Valley Fire Foundation, San Mateo County:	2017 - Current
» The County of Yolo, Yolo County:	2017 - Current
» Yuba City Unified School District, Sutter County:	2005-06 & 2013 - Current
» Yuba Comm. College District, Yuba, Sutter, Glenn, Lake, & Yolo Counties:	2005

## V. PROJECT / PROGRAM HIGHLIGHTS

### VACAVILLE UNIFIED SCHOOL DISTRICT: 2000 - CURRENT



CPM originally began working for the District in 2001 in preparation for a \$196 million local new construction and modernization bond, Measure V. CPM worked closely with the District to successfully complete a massive list of 57 projects that were completed on time and on budget, proving its success to it's staff, students, and community at large.

The District once again chose CPM as their Program/Construction Manager for it's new Measure A Bond Program that was passed in November 2014 for \$194M. The District hired CPM to provide program and construction management services, including strategic planning, monitoring and tracking of program and project budgets, reporting to the Citizens' Oversight Committee, developing/maintaining design standards and project management of design phase through bid and award.

CPM is currently in the process of planning and the implementation of various new construction and modernization projects for Measure A, a short summary list of those projects are highlighted below:

#### **Name of Project & School:**

Elm Campus - ADA Improvement Project  
Jepson MS - Modernization Project  
Orchards ES - Paving Improvement Project  
Sierra Vista K/8 - Inc. 1 - Campus Conversion Project  
Sierra Vista K/8 - Inc. 2 - New MPB and Science Classroom Project  
Sierra Vista K/8 - Inc. 3 - Admin./Library/Media Ctr. Modernization  
Vacaville HS - Inc. 1 - Parking Lot & Tennis Court Improvement Project  
Vacaville HS - Inc. 2 - New Classroom Building(s) Project  
WC Wood HS - New Stadium Project  
District-Wide  
Independent Study Relocation Project  
District-Wide

#### **Nature of Project:**

ADA Improvement  
Modernization  
Improvement  
Conversion  
New Construction  
Modernization  
Improvement  
New Construction  
New Construction  
Technology - Phase 1  
Relocation  
Prop 39 Planning & Implementation

#### **District Contact:**

Mr. Dan Banowetz, Chief Facilities, Maintenance & Operations Officer  
401 Nut Tree Road  
Vacaville, CA 95687  
(707) 453-6139



#### **WILL C. WOOD HIGH SCHOOL - NEW STADIUM**

#### **GRAND OPENING**



## CENTER UNIFIED SCHOOL DISTRICT:



CPM was originally selected as project manager and Owner's Representative for the \$35 million Wilson C. Riles Junior High School. In this role, CPM developed and coordinated the CM At-Risk project-delivery selection process, assisted with the bid-award-start phase of the project, budget tracking and ongoing Owner representation through the duration of the project. CPM began the design phase management, including the architect selection process, for four (4) modernization projects and their new Rex Fortune Elementary School.

Over the summer of 2016, CPM assisted Center USD with a District-Wide wireless access point infrastructure project, and managed the design process for a fully digital TV Studio and Performing Arts audio-visual project. This hugely successful project was well received by the District and community at large.

CPM's quick-strike project team has implemented over \$1 million of "beautification" type projects for the District over the summer of 2017. Paralleling these upgrades are complete Prop 39 California Energy Commission lighting upgrade projects on eight (8) campuses. Duties include consultant selection, budget development and tracking and oversight of project management responsibilities. Responsibilities include development and implementation of a CM at risk construction delivery method for the middle school project, including the RFQ, guide the District's selection process, draft contract agreement and function as owner's representative. Additional duties include establishing bid-award-start schedules for all of the District's capital outlay projects, setting up a labor compliance program (LCP) and maintaining construction administration functions.

Projects completed over summer of 2018 included: HVAC Upgrades at two (2) elementary schools, a Senior Plaza Upgrade project at Center High School, along with a new campus-wide VoIP Phone System/Digital Intercom Clock Bell System, and a complete Fiber Backbone Infrastructure project.



### District Contact:

Mr. Craig Deason  
Assistant Superintendent  
8408 Watt Ave.  
Antelope, CA 95843-9116  
(916) 338-7580  
cdeason@centerusd.k12.ca.us

*"Through many projects, including the building of our Center High School Stadium, the professionalism, rapid response, and attention to detail have been a great asset to the successful completion of each project on time and under budget"*

*- Jeanne Bess, Director of Fiscal Services, Center Unified School District*



## WOODSIDE ELEMENTARY SCHOOL DISTRICT



Capital Program Management (CPM) was selected by the Woodside Elementary School District to be their owner's representative to plan, manage, and oversee the implementation of their \$16.7 million Measure D Bond Program and \$5 million Capital Campaign projects. CPM was engaged after the District had projects on-going. CPM's initial role was to assess the status of the various projects. This included the review of prior planning documents, validation of current projects' scopes, schedules, and budgets; plan reviews, review and renegotiations of the Architect's and Lease Lease-back entities' agreements. CPM then developed a program implementation plan through a series of committee meetings, community meetings, and Board workshops. This work included integration of their *Proposition 39 Energy projects*, condition assessments, project delivery strategies, project prioritization, master planning, logistical planning, and the development of program budgets, and master schedule. *We also obtained DSA certification on all prior projects that were closed without certification.* CPM oversaw the execution of the implementation plan and developed a deferred maintenance plan. Our program activities included such items as Board reports, Citizens' Oversight Committee reporting, professional services selection, legal counsel coordination, and contract negotiations. In addition, CPM was involved with managing project activities such as design phase management, construction management, oversight and coordination of design professionals, oversight of the construction team, oversight of the inspection team, tracking all program expenditures, review and approval of all expenditures, furniture and equipment procurement, coordinating owner moving logistics, and project closeouts.

Specific projects included a new Design Lab, new Multipurpose Room, a new Preschool, field replacement projects, and several renovation projects.

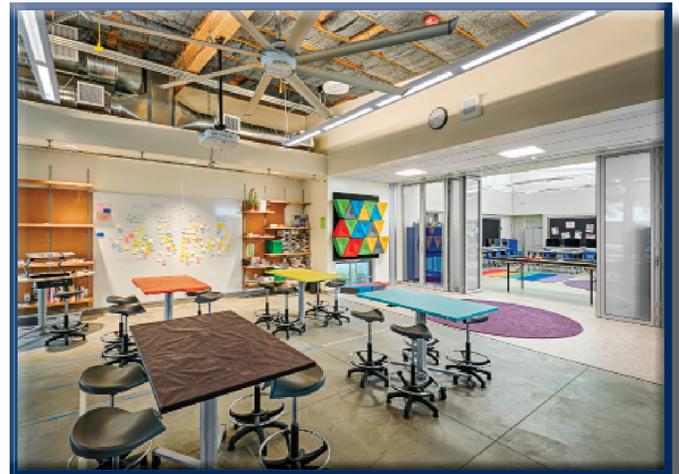
### District Contact:

Dr. Beth Polito, Former Superintendent of Woodside ESD  
Now with: Las Lomitas Elementary School District  
(650) 854-6311  
[bpolito@llesd.org](mailto:bpolito@llesd.org)

### SELLMAN PAVILION MULTI-PURPOSE ROOM



### DESIGN LAB



## HILLSBOROUGH CITY SCHOOL DISTRICT



The District hired CPM as its program manager to assist with the planning and implementation for its \$67 million local bond program of new construction and renovation projects. Initial services included revisiting and refining the master plan, providing strategic planning, conducting condition assessments, establishing project priorities, analyzing cash flow, developing a program schedule, determining project budgets and compiling this plan. Also included were the development of District design standards and outline specifications, procurement of design services and design phase management through bid and award. During construction phase, our scope included monitoring and tracking of program cash flow, program and project budgets and assisting with the governmental agencies project closeout.

- Crocker M.S. Technology/Lecture Hall/Band Room
- South E.S. Multi-Purpose Room
- North E.S. Multi-Purpose Room
- West E.S. Renovation
- West E.S. New Classrooms
- North E.S. Conversion
- North E.S. Modernization
- Crocker M.S. Modernization
- South E.S. Modernization

In addition, the Hillsborough City School District hired CPM to help assist them with their Prop 39 planning and implementation of energy conservation projects.

### District Contact:

Ms. Louann Carlomagno, Superintendent  
300 El Cerrito Avenue  
Hillsborough, CA 94010  
(650) 342-5193  
lcarlomagno@hcsd.k12.ca.us

### CROCKER M.S. TECHNOLOGY/LECTURE HALL/BAND ROOM



"The Hillsborough City School District relied on CPM to manage both our large bond projects (which included four new buildings, complex conversion projects, and top to bottom refurbishments) and our relatively small Prop 39 projects (including changing out light fixtures and updating HVAC system controls). In both the big and small projects, CPM impressed me with their expertise, attention to detail, organization, communication, and their ability to deliver projects on-time and under-budget. With their help, both of our projects accomplished more than we ever thought possible, allowing safer, more efficient, more creative spaces for our students. I would 100% use them again."

- Mr. Anthony Ranii, Former Superintendent of HCSD



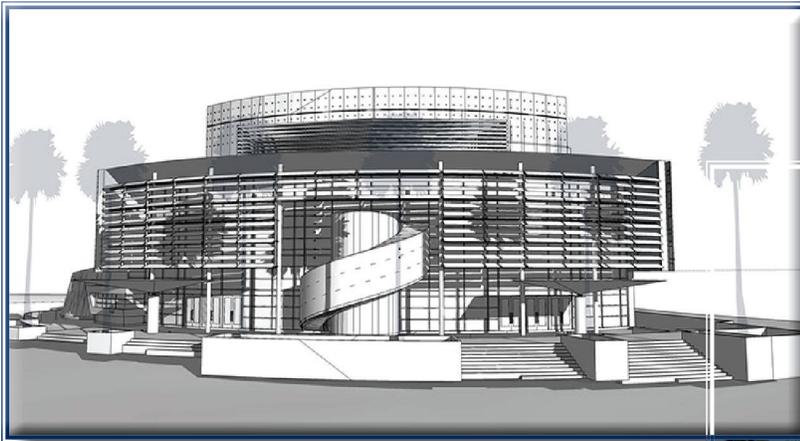
## BONITA UNIFIED SCHOOL DISTRICT

Following passage of its \$56.4 million Measure C General Obligation bond in March 2004, the District later hired CPM to guide the work in its \$90 million capital outlay program. Bonita USD's program now exceeds \$173.5M with the passage of Measure AB in 2008. CPM developed a program implementation strategy for that involved eight (8) key steps: prioritization of work, identification of funding, detailed scope of work development, budget development, schedule development, project controls and reporting, design standards, and guiding the project delivery method selection process. Additionally, CPM is currently providing on-going owner representation, design phase management, out-to-bid/award functions and budget-management expenditure tracking, and quarterly COC reporting for each bond measure.

The Bonita Center for the Arts project is located on the San Dimas High School Campus. The 29,250-square-foot center features a 700-seat main indoor theater as well as an outdoor performance area. Both can host drama, dance, lecture, band and choir performances. When the schools are not using the facility, it can also be leased to visiting theater companies, which can help generate additional income.

A celebratory concert marked the debut of the Bonita Center for the Arts (BCA) in San Dimas, California, a facility that will serve both the cities of San Dimas and La Verne.

Most recently, CPM worked with District on the modernization and new construction of two multi-purpose rooms.



## BONITA CENTER FOR ARTS



### District Contact:

Ms. Susan Hume  
Assistant Superintendent of Business Services  
115 West Allen Ave  
San Dimas, CA 91773  
(909) 971-8200 ext. 5200

## VI. TESTIMONIALS

Our client satisfaction commitments can be measured by the length of our relationships, the quantity of our completed projects, and implementing back-to-back local bond measure capital outlay programs. We have also continued to be a reliable resource and be available to our clients on an on-call basis, even when the timing of projects slows down. We encourage you to read our current and previous client testimonials listed below:

.....

"The Hillsborough City School District relied on CPM to manage both our large bond projects (which included four new buildings, complex conversion projects, and top to bottom refurbishments) and our relatively small Prop 39 projects (including changing out light fixtures and updating HVAC system controls). In both the big and small projects, CPM impressed me with their expertise, attention to detail, organization, communication, and their ability to deliver projects on-time and under-budget. With their help, both of our projects accomplished more than we ever thought possible, allowing safer, more efficient, more creative spaces for our students. I would 100% use them again."

Anthony Ranii, Former Superintendent of Hillsborough CSD  
**Now with: Montecito Unified School District**  
(805) 969-3249  
[aranii@montecitou.org](mailto:aranii@montecitou.org)



"As the Superintendent of the District, I have been thoroughly impressed with the expertise, professionalism, and responsiveness of the CPM staff. CPM is committed to client services, is team oriented and works well with all stakeholders, architects and contractors which led to our projects being delivered on time within budget. CPM is also very knowledgeable with the various public agencies such as DSA and ADA regulations. I would highly recommend the CPM team to any District seeking program, projects, and construction support from a reliable, reputable, and knowledgeable firm.."

Dr. Beth Polito, Former Superintendent of Woodside ESD  
**Now with: Las Lomas Elementary School District**  
(650) 854-6311  
[bpolito@llesd.org](mailto:bpolito@llesd.org)



"When I was building my bond program management team I did not hesitate to include Capital Program Management (CPM). They proved to be invaluable during our previous bond program and they have gotten even better over the last three plus years of my current bond program. They excel in all aspects of program, construction and budget management.

Daniel Banowetz  
Chief Facilities, Maintenance and Operations Officer  
**Vacaville Unified School District**  
(707) 999-0783  
[DBanowetz@vacavilleusd.org](mailto:DBanowetz@vacavilleusd.org)



"In my seven years as superintendent we have worked closely with CPM on several projects. The team is professional, prompt, and expert in their field. Their communication with me, staff, stakeholders, and most importantly the Board of Trustees has been remarkable. I give CPM my highest recommendation."

Dr. Michael Borgaard, Superintendent  
**Elverta Joint Elementary School District**  
(916) 991-2244  
[mborgaard@elverta.k12.ca.us](mailto:mborgaard@elverta.k12.ca.us)



## VII. REFERENCES

Please feel free to contact our references below to answer any questions you may have.



### VACAVILLE UNIFIED SCHOOL DISTRICT: 2000 - CURRENT

Mr. Dan Banowetz, Chief Facilities, Maintenance & Operations Officer  
401 Nut Tree Road  
Vacaville, CA 95687  
(707) 453-6139  
[DBanowetz@vacavilleusd.org](mailto:DBanowetz@vacavilleusd.org)



### LODI UNIFIED SCHOOL DISTRICT: 2018- CURRENT

Mr. Leonard Kahn, Chief Business Officer  
1305 E. Vine Street  
Lodi, CA 95240  
(209) 331-7121  
[lkahn@lodiUSD.net](mailto:lkahn@lodiUSD.net)



### CENTER UNIFIED SCHOOL DISTRICT: 2000 - CURRENT

Mr. Scott Loehr, Superintendent  
8408 Watt Avenue  
Antelope, CA 95843-9116  
(916) 338-7580  
[superintendent@centerusd.k12.ca.us](mailto:superintendent@centerusd.k12.ca.us)



### DRY CREEK JOINT ELEMENTARY SCHOOL DISTRICT: 2008 - CURRENT

Mr. Brad Tooker, Superintendent  
9707 Cook Riolo Road  
Roseville, CA 95747-9793  
(916) 770-8890  
[btooker@dcjesd.us](mailto:btooker@dcjesd.us)



### ELVERTA JOINT ELEMENTARY SCHOOL DISTRICT: CA - 2010 - CURRENT

Dr. Michael Borggaard, Superintendent  
7900 Eloise Ave.  
Elverta, CA 95626  
(916) 991-2244  
[mborggaard@elverta.k12.ca.us](mailto:mborggaard@elverta.k12.ca.us)