Welcome to the Joint Lease-Leaseback Outreach Event!

Join C.W. Driver, Erickson-Hall, Soltek Pacific, Sundt Construction, and Swinerton Builders to hear about 6 upcoming lease-leaseback subcontracting opportunities bidding before the end of 2021. Representatives from each Prime will go over each projects' scope-of-work, project schedules, estimated bid package values, and will also highlight opportunities for small and diverse business enterprises.

**Bidding Dates and Projects:**
- **Aug/Sep 2021:** O’Farrell Charter School Whole Site Modernization
- **Sep/Oct 2021:**
  - Wegeforth Elementary School Whole Site Modernization Phase 1
  - Darnall Charter School Whole Site Modernization
  - Franklin Elementary School Whole Site Modernization
- **Oct/Nov 2021:** Albert Einstein Academy Whole Site Modernization
- **Nov/Dec 2021:** Morse High School New Administration Building and Theater, Phase III
Housekeeping

• All participants are muted upon entry
• This session is being recorded
• To ask a question, use the Q&A icon at the bottom of the Zoom screen
• Please specify which Prime the question is for

• Questions will be addressed after all Primes have presented
Housekeeping

• Please understand that we are limited to how many questions we can take today
• A follow-up email will be sent to all registrants with each Prime’s primary contact information in the coming days
<table>
<thead>
<tr>
<th>Topic</th>
<th>Time</th>
</tr>
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<tbody>
<tr>
<td>Introduction &amp; Housekeeping</td>
<td>09:00</td>
</tr>
<tr>
<td>CW Driver</td>
<td>09:05</td>
</tr>
<tr>
<td>Erickson-Hall</td>
<td>09:20</td>
</tr>
<tr>
<td>Soltek Pacific</td>
<td>09:30</td>
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<tr>
<td>Sundt Construction</td>
<td>09:45</td>
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<td>Swinerton Builders</td>
<td>09:55</td>
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<td>District Prequalification</td>
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<tr>
<td>District Project Stabilization Agreement</td>
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<tr>
<td>Q&amp;A</td>
<td>10:15</td>
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<tr>
<td>Adjourn</td>
<td>10:30</td>
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</table>
WELCOME!
AGENDA

1. Welcome & Introductions
2. Franklin Elementary Project Overview
3. Darnall Charter School Project Overview
4. Mira Mesa High School Project Overview
5. C.W. Driver Prequalification
INTRODUCTIONS:

• Keith Kauffman – C.W. Driver – Project Executive
• Samuel Myovich – C.W. Driver – Project Director
• Leanne Loera – C.W. Driver Outreach Coordinator & Estimating Admin
<table>
<thead>
<tr>
<th>Statistics</th>
<th>Value</th>
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<tbody>
<tr>
<td>Years in Business</td>
<td>102</td>
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<tr>
<td>Employees</td>
<td>300+</td>
</tr>
<tr>
<td>Interns per year</td>
<td>5-10</td>
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<tr>
<td>Clients in 2020</td>
<td>80</td>
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<tr>
<td>Offices in California</td>
<td>4</td>
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<tr>
<td>In-progress projects</td>
<td>68</td>
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<tr>
<td>Revenue in 2020</td>
<td>$500 M</td>
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<tr>
<td>Average leadership tenure with CWD</td>
<td>31</td>
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<tr>
<td>CSU K-12 projects in the books</td>
<td>135+</td>
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<tr>
<td>Completed LLB projects</td>
<td>35+</td>
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<tr>
<td>Industry-leading EMR</td>
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</table>
Franklin Elementary School
SAFDIE RABINES ARCHITECTS

- Franklin Elementary School Renderings
Whole Site Modernization

- New construction and modernization
- Campus remains in operation

Franklin Elementary School
Franklin Elementary School
Franklin Elementary School
Franklin Elementary School
Franklin Elementary School
Franklin Quick Facts

• Estimated Value: $35mil
• Bid Advertisement: September/October 2021
• Construction Start: February/March 2022
• Total Duration: 32 months
• Construction Complete: October 2024
Darnall Charter School
• Darnall Charter School Renderings
Darnall Charter School
Darnall Charter School
Darnall Charter School
Darnall Quick Facts

- Estimated Value: $20mil
- Bid Advertisement: September/October 2021
- Construction Start: January/February 2022
- Total Duration: 19 months
- Construction Complete: August/Sept. 2023
ARCHITECTS
MOSHER
DREW

• Mira Mesa High School Renderings
Whole Site Modernization

• 3 GMP’s – 7 total phases
  • GMP#1 – CTE Classroom
  • GMP#2 – Ball Fields
  • GMP#3 – Whole Site Modernization
    • Phase 1 – Building 900 & 600
    • Phase 2 – Building 100, 200 & 300
    • Phase 3 – Building 400
    • Phase 4 – Site Improvements

• New construction (Bldg. 900) and modernizations
• Campus remains in operation
Mira Mesa High School
Mira Mesa High School
Mira Mesa High School Quick Facts

- Estimated Value: $62mil
- Bid Advertisement:
  - GMP#1 – CTE – Feb 2022
  - GMP#2 – Fields – Feb 2022
  - GMP#3 – WSM – July 2022
- Construction Start:
  - GMP#1 – CTE – June 2022
  - GMP#2 – Fields – June 2022
  - GMP#3 – WSM – Dec 2022
- Total Duration: 38 Month
- Complete: August 2025
C.W. Driver Prequalification

Please raise your hand if you are prequalified with CW Driver
How to Prequalify with C.W. Driver

• Step 1 - Go to cwdriver.com
• Step 2 - Click on the Menu Tab
How to Prequalify with C.W. Driver

Step 3

Step 4
PREQUALIFICATION PROCESS

• Objective rating system
• Quality craftsmanship
• Relevant experience
• Financial strength / Bonding capacity
• Safety history / EMR
C.W. Driver Contacts

Subcontractor Outreach
Leanne Loera
Lloera@cwdriver.com

Prequalification Coordinator
Jamie Ballesteros
prequalification@cwdriver.com

C.W. Driver San Diego Office
7588 Metropolitan Dr.
San Diego, CA, 92108
619.696.5100
ERICKSON-HALL CONSTRUCTION CO.
An Employee Owned Company
• Established in 1998
  ▪ David Erickson – Founding Principal & CEO
  ▪ Michael Hall – Founding Principal & COO
  ▪ Mat Gates - President

• Employee-Owned 2019
  ▪ 170 Employees

• Office Locations
  ▪ San Diego County - Headquarters
  ▪ Los Angeles/Orange County
  ▪ Riverside County
  ▪ Imperial County
• San Diego County School District Clients
  ▪ San Diego Unified School District
  ▪ Grossmont Union High School District
  ▪ Cajon Valley Union School District
  ▪ South Bay Union School District
  ▪ Bonsall Unified School District
  ▪ Fallbrook Unified School District
  ▪ Poway Unified School District
  ▪ San Dieguito Union High School District
  ▪ Solana Beach School District
  ▪ Del Mar Union School District
  ▪ Oceanside Unified School District
  ▪ Vista Unified School District
• TRADE PACKAGES
  ▪ Electrical – Intrusion – Low Voltage – Fire Alarm
  ▪ HVAC & Controls
  ▪ Specialties
  ▪ Specific Finishes
  ▪ Remaining Bid Packages – TBD

• FIRST / SECOND TIER SUBCONTRACTORS
  ▪ Erickson-Hall will facilitate connections between first and second tier subcontractors
ALBERT EINSTEIN ACADEMY

Start 3/22
Complete 6/24

Erickson-Hall Construction
An Employee Owned Company
• PHASE I - MAKE READY
  ▪ Demo Existing Play Courts
  ▪ New Fire Service
  ▪ New Water Service
  ▪ Site Electric
  ▪ Storm Drain with Filtration & Holding Tank
  ▪ New AC Paving
  ▪ New Play Equipment
  ▪ 7 Portable Classrooms & Portable Restroom Buildings
  ▪ Artificial Turf
  ▪ Concrete Retaining Walls at Trash Enclosure
  ▪ Fencing & Gates
  ▪ Miscellaneous Steel
  ▪ Building B MDF Enlargement
• PHASE 2 - BUILDINGS C & D
  ▪ Move Existing Classrooms into Phase 1 – Make Ready Portables
  ▪ Demo Existing Portables, Underground Utilities, Play Equipment, Hardscape, etc.
  ▪ Remove Trees
  ▪ Clear & Grub
  ▪ Shore/Protect Existing Structures
  ▪ Mass Grade for Buildings & Retaining Walls
  ▪ Demo Existing Elevator & Tower
  ▪ Construct 2-Story Classroom Building C (24,500SF)
    o Structural Steel Frame/Metal Studs & Stucco
    o Kitchen
    o 3-Stop Elevator with Concrete Tower
    o Concrete on Metal Deck (2nd Floor)
    o Fire Protection Systems
• PHASE 2 - BUILDINGS C & D (cont)
  ▪ Construct Multi-Purpose Building D (11,500SF)
    o Structural Steel Frame/Metal Studs & Stucco
    o Kindergarten Classrooms
    o “Barrel” Roof with Standing Seam Roof
    o Fire Protection Systems

▪ Extensive Site Work
  o Fire Main, Water, Sewer, Gas & Storm Drain
  o Underground Electrical Systems
  o Site Hardscape & 10’ Retaining Walls
  o Ornamental/Chain Link Fencing
  o Site Stairs/Ramps
  o Irrigation & Landscaping
  o Artificial Turf
  o Street Right-of-Way Improvements
  o Move-in of FF&E Equipment
• PHASE 3 – Renovation (Multi-Purpose) Building B
  ▪ Select Demolition
  ▪ Remodel Existing Restrooms
  ▪ Convert Existing Kitchen into Office Space
  ▪ Install New HVAC
  ▪ Construct New Roof
  ▪ Upgrade Electrical Systems
  ▪ Install New Doors & Windows
  ▪ Install new Interior Finishes
• PHASE 4 – Removal of Interim Housing
  ▪ Remove Phase I – Make Ready Portable Buildings
  ▪ Demobilize
NEW SUBCONTRACTOR RELATIONSHIPS

- How to Work with Erickson-Hall
  - Open/Honest Communication
  - Pull Planning – Milestone Achievement
  - Procore – Web-based Project Management Hub

SUBCONTRACTOR PREQUALIFICATION

- Must be Prequalified with San Diego Unified
O’Farrell Charter School WSM
K-8 Modernization LLB

6130 Skyline Drive, San Diego, CA 92114
Meet Your Team

- Ana Aispuro—Rebelin
  - Small Business Liaison Officer (SBLO)

- Larry Valdez
  - Project Manager

- Ciaran O’Reilly
  - Estimator
Small Business Liaison Officer (SBLO)

- Overview: Ensure diversity in procurement
- First contact point
- Establish relationships w/ small businesses
- Department assistance to achieve goals & maintain on track for commitments
Website Bid Calendar Access

- Visit [www.soltekpacific.com](http://www.soltekpacific.com)
- Scroll down and select “Estimating”
- Top right select “Bid Calendar”
To find more information about Soltek prequalifications, visit
https://www.soltekpacific.com/small-business/
OR
Contact Ana Aispuro-Rebelin at
SBLO@soltekpacific.com
Estimating Information

- Invites sent out via Smart Bid
- Must be prequalified by both SDUSD and Soltek to bid.
- Deadline to get prequalified is SEPT. 1st
- Bid due date is SEPT. 16th no later than 12:30pm
- Best value award NOT lowest bidder

Contact Ciaran O’Reilly at coreilly@soltekpacific.com
O’Farrell Charter School WSM
K-8 Modernization

- **Scope:** The project consists of construction of a shade structure, north parking lot and site improvements, west parking lot and site improvements, campus wide roofing replacement, alterations to south entrance perimeter fencing, alteration to elementary school lawn, and alternations to 12 existing buildings.

- **Project Estimate:** $15,850,000
### Bid Packages for O’Farrell WSM:

<table>
<thead>
<tr>
<th>BP #</th>
<th>BP Description</th>
<th>BP #</th>
<th>BP Description</th>
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<tbody>
<tr>
<td>1</td>
<td>Survey</td>
<td>16</td>
<td>Acoustical Tile Ceilings</td>
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<tr>
<td>2</td>
<td>Final Clean</td>
<td>17</td>
<td>Flooring</td>
</tr>
<tr>
<td>3</td>
<td>Furniture and Equipment Moving</td>
<td>18</td>
<td>Food Service Equipment</td>
</tr>
<tr>
<td>4</td>
<td>Site Demo</td>
<td>19</td>
<td>Painting</td>
</tr>
<tr>
<td>5</td>
<td>Selective Demo</td>
<td>20</td>
<td>Restroom Accessories and Fire Extinguishers</td>
</tr>
<tr>
<td>6</td>
<td>Concrete</td>
<td>21</td>
<td>Plumbing</td>
</tr>
<tr>
<td>7</td>
<td>Concrete Unit Masonry</td>
<td>22</td>
<td>HVAC</td>
</tr>
<tr>
<td>8</td>
<td>Carpentry</td>
<td>23</td>
<td>Electrical</td>
</tr>
<tr>
<td>9</td>
<td>Waterproofing</td>
<td>24</td>
<td>Fire Alarm</td>
</tr>
<tr>
<td>10</td>
<td>Roofing</td>
<td>25</td>
<td>Asphalt</td>
</tr>
<tr>
<td>11</td>
<td>Doors and Door Hardware</td>
<td>26</td>
<td>Synthetic Grass and Planting</td>
</tr>
<tr>
<td>12</td>
<td>Windows and Glazing</td>
<td>27</td>
<td>Chain Link Fences and Gates</td>
</tr>
<tr>
<td>13</td>
<td>Roll Up Doors</td>
<td>28</td>
<td>Auditorium Seats</td>
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<tr>
<td>14</td>
<td>Plaster and Gypsum Board</td>
<td>29</td>
<td>Bleachers</td>
</tr>
<tr>
<td>15</td>
<td>Ceramic Tiling</td>
<td>30</td>
<td>Lunch Court Shelters</td>
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Bid Package 5 - Selective Demolition
Bid Package 6 - Concrete
Bid Package 10 - Roofing
Bid Package 11 - Doors and Door Hardware
Bid Package 18 - Food Service Equipment
Bid Packages 21, 22, and 23 - Plumbing, HVAC, and Electrical
Non-Mandatory Bid Walk:
August 26th, 2021 at 9:00am
Contact: Francisco Bandin at fbandin@soltekpacific.com

Bid Due Date: September 16th, 2021 via SmartBid
**SDUSD Morse High School**

Approx. $45M (LLB)

**Bidding Starts:** November 2021

**Phase III Scheduled Construction Start:** March 2022

SDUSD & SUNDT Prequalifications Required

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### Anticipated Bid Packages

<table>
<thead>
<tr>
<th>01A Site Provisions</th>
<th>09F Resinous Matrix Terazzo Flooring</th>
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<tr>
<td>01B Survey</td>
<td>10A Specialties</td>
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<tr>
<td>01C Final Clean</td>
<td>10B Signage</td>
</tr>
<tr>
<td>01E Moving</td>
<td>11A Equipment</td>
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<tr>
<td>02A Demo &amp; Abatement</td>
<td>11B Theatrical Systems</td>
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<tr>
<td>03A CIP Concrete</td>
<td>11C Theatrical Lighting</td>
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<tr>
<td>04A Masonry</td>
<td>11D Theatrical AV Systems</td>
</tr>
<tr>
<td>05A Structural Steel</td>
<td>12A Window Coverings</td>
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<tr>
<td>06A Finish Carpentry</td>
<td>12B Fixed Seating</td>
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<td>07A Waterproofing</td>
<td>14A Elevator</td>
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<td>07B Roofing</td>
<td>21A Fire Sprinkler</td>
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<td>07C Sheet Metal</td>
<td>22A Plumbing</td>
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<td>07D Insulation</td>
<td>23A HVAC</td>
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<tr>
<td>08A Doors/Frames/Hardware</td>
<td>26A Electrical</td>
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<tr>
<td>08B Overhead Coiling Doors</td>
<td>27A Communications</td>
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<tr>
<td>08C Glazing</td>
<td>28A Security &amp; Access</td>
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<td>09A Gyp Brd Assemblies</td>
<td>28B Fire Alarm</td>
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<tr>
<td>09B Tile</td>
<td>31A Earthwork</td>
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<tr>
<td>09C Acoustic Ceilings</td>
<td>32 Site Furnishings</td>
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<tr>
<td>09D Wood Flooring</td>
<td>32B Concrete Paving</td>
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<tr>
<td>09E Paint &amp; Coatings</td>
<td>32C Fences &amp; Gates</td>
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<tr>
<td></td>
<td>32D Landscape/Irrigation</td>
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<td></td>
<td>33A Utilities</td>
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**Roesling Nakamura Terada Architects RNT**
Project Duration
January 2022 Thru January 2024
**Duration of work**
January – February 2022
SDUSD Morse High School

**PHASE III, PHASE 1 ADMIN BUILDING & PAC BUILDING**

**Duration of work**
March 2022
Thru
January 2024
Duration of work
March thru June 2022
**Duration of work**
March thru August 2022
Duration of work
June thru September 2022
**SDUSD Morse High School**

**PHASE III, PHASE 3 DEMOLITION B700 ADMIN BLD & NEW QUAD WORK**

**LEGEND**
- Temporary Construction Fence

**KEY FEATURES**
- Phase 3 to commence upon completion of the admin building

**Duration of work**
June thru November 2023
**SDUSD Morse High School**

**PHASE III, PHASE 4 NEW PARKING LOT / DEMOBILIZATION**

*Duration of work*

November 2023 Thru January 2024
SDUSD Gompers Preparatory Academy
Approx. $39M (LLB)

Scheduled Construction Start: May 2022
SDUSD & SUNDT Prequalifications Required

Bidding Starts: Spring 2022
SDUSD Marston Middle School
Approx. $39M (LLB)

Scheduled Construction Start: May 2022
SDUSD & SUNDT Prequalifications Required

Bidding Starts February 2022
SDUSD Marston Middle School
Approx. $39M (LLB)
1. Complete **PREQUAL** for subcontractors ONLY....OR **REGISTER** as a vendor

- 1st tier Sub **GOALS** based on trade assessments
- Bidders receive filtered report by CSI Code for **NETWORKING** with Local & XBEs
- Teaming opportunity **NOTIFICATIONS** and virtual events
- Non XBE 1st tier bidders receive **BIDDERS LIST** for Public Works Projects ONLY
- Non-Trade specific **OUTREACH** opportunities
  - Site Trailers
  - Temp Fencing
  - Chemical Toilets
  - Office equipment + Supplies + Furniture
WEGEFORTH ELEMENTARY SCHOOL

WHOLE SITE MODERNIZATION
- FLOORING
- WALL TILE
- PAINT
- CASEWORK
- ROOFING
• ACCESS CONTROL
• LIGHTING
• FIRE ALARM
• Cabling
• Sinks
• Plumbing Fixtures
• Cooling Units
• KITCHEN
• THEATRICAL LIGHTING
• SEISMIC UPGRADES
• PLAYGROUND STRUCTURES
• GAME COURT STRIPING
• SHADE STRUCTURES
• CONCRETE AND ASPHALT
• LANDSCAPING
• IRRIGATION
• MEDIUM PRESSURE GAS LINE
• PV INFRASTRUCTURE
Bid Advertisement Date: 10/5/2021
Site Walk: 10/14/2021
District Prequal Application & RFI’s Due: 10/21/2021
District Prequal Deadline: 10/28/2021
Bids Due: 11/5/2021
Construction Start: 2/1/2022
Project Duration: 30 months
POSSIBLE TRADES INCLUDE:

- Moving
- Survey
- Final Clean
- Selective Demolition
- Hazardous Materials
- Concrete Reinforcing
- CIP Concrete
- Structural Steel
- Metal Decking
- Rough Carpentry
- Architectural Woodwork
- Insulation
- Roofing
- Sheet Metal
- Doors and Hardware
- Glass & Glazing
- Cement Plastering
- Drywall & Framing
- Tiling
- Acoustical Ceilings
- Resilient Flooring
- Vapor Emission Control
- Epoxy Flooring
- Painting
- Visual Display Surfaces
- Signage
- Toilet & Bath Accessories
- Fire Extinguisher
- Metal Lockers
- Ground-Set Flagpoles
- Equipment
- Food Service Equipment
- Athletic Equipment
- Play Structures
- Playground Surfacing
- Shade Structures
- Masonry
- Plumbing
- HVAC
- Electrical
- Fire Alarm & LV
- Earthwork and Site Demolition
- Erosion and Sediment Control
- Asphalt Paving
- Pavement Markings & Accessories
- Site Concrete
- Unit Pavers
- Fencing & Gates
- Site Furnishings
- Landscaping & Irrigation
- Site Utilities
OPPORTUNITIES FOR EBE'S

Bid Packages Estimated to be Under $200,000:

- Athletic Equipment
- Epoxy Flooring
- Metal Lockers
- Fire Extinguisher
- Ground-Set Flagpoles
- Site Furnishings
- Pavement Markings & Accessories
- Masonry
- Survey
- Insulation
- Shade Structures
- Signage
- Equipment
- Visual Display Surfaces
- Final Clean

- Toilet & Bath Accessories
- Erosion and Sediment Control
- Cement Plastering
- Vapor Emission Control
- Tiling
- Asphalt Paving
- Sheet Metal
- Unit Pavers
- Acoustical Ceilings
- Resilient Flooring
- Food Service Equipment
- Playground Surfacing
- Rough Carpentry
- Earthwork and Site Demolition
• Interested Subcontractors should contact Larry Hendrick and Meagan Macias to be added to our Bid List: lhendrick@swinerton.com / mmacias@swinerton.com
  Include Project Name (Wegeforth ES), Trade(s), Contact Information
• You will receive an Invite via Building Connected
• Update Bid Status with Accepted or Declined
• Closer to Bid Due Date, look out for a direct email from a Swinerton Bid Taker, including Scope Sheet
• Fill out Scope Sheet completely and Submit with your typical Bid Proposal
• Successful Bidders are required to be Prequalified with Swinerton as well, we encourage you to begin this process now
Any Subcontractor working directly for Swinerton, or interested in working for Swinerton, must be prequalified in order to be awarded a contract.

Consultants, Service Providers, Engineers, Architects, Vendors, Suppliers, Tier-Subs do **NOT** need to prequalify with Swinerton

https://swinertont.com/subcontractor-prequalification/

**SUBCONTRACTOR PREQUALIFICATION**

Any subcontractor working for Swinerton, or interested in working for Swinerton, must be prequalified in order to be awarded a contract. Please click the link down below to access our online application. But before you do, please note the following:

**DOCUMENTS**

Have the following documents ready for electronic upload with your submission. Your financial documents are sent to a confidential document storage facility which can only be viewed by our financial reviewer. When you reach the document upload page, enter a name/description for each document or it will not upload correctly.

1. Current Financial Statement: Income Statement plus Balance Sheet for your most recently completed fiscal year. Full 12 months (e.g., Dec 31, March 31, June 30) – If you are a new business, and have less than 12 months of financial data, contact subcontractorprequal@swinerton.com with this information. We will work with you and our project team to determine the best course of action.
2. Letter of Bondability/Bonding Capacity – not the actual bond.
3. Certificate of Insurance
4. OSHA Forms 300 & 300A, last 3 years (only last year for existing subcontractors), if you are exempt from OSHA recordkeeping, provide a statement with the reason for your exemption as your upload. **If no injuries indicated on 300A, please include 300 reports.**
5. 3-year DMI history – provide verifying document or request from your insurer.
6. Certifications (MBE, DBE, etc.)
7. Line of Credit Letter from your bank or financial institution
8. Form W-9
Supporting documents required and submitted via electronic upload:

1. Current Financial Statement
2. Letter of Bondability
3. Certificate of Insurance
4. OSHA Forms 300 & 300A
5. 3-year EMR history
6. Certifications (SBE, MBE, WBE, DVBE, etc.)
7. Line of Credit Letter
8. Form W-9

- All subcontractors must renew annually to keep prequalification status active
- Need help? Contact Meagan Macias, Estimating Coordinator, at mmacias@swinerton.com
CONTACT US

Ryan Bouchard
PROJECT MANAGER
ryan.bouchard@swinerton.com

Kim Patton
OUTREACH MANAGER/SBLO
kpatton@swinerton.com
San Diego Unified Presentations:
1. Business Outreach Program
2. District Prequalification
3. Project Stabilization Agreement (PSA) Requirements
Emerging Business Enterprise (EBE)

“EBE” is our umbrella term for:

– **DVBE/SDVOSB**: Disabled Veteran Business
– **DBE**: Disadvantaged Business Enterprise
– **MBE**: Minority-owned Business Enterprise
– **WBE**: Women-owned Business Enterprise
– **SBE**: Small Business Enterprise
Inclusive Program

• Certifications recognized by SDUSD
  – California Department of General Services (DVBE, SB)
  – California Unified Certification Program (DBE [woman, minority])
  – California Public Utilities Commission (WBE, MBE)
  – City, County or Local Agency Certifications (i.e., SLBE, ELBE, etc.)
  – Federal SDVOSB (CVE letter)
  – Some other agency certifications
  – Some EBE organizations (MSDC, WBENC)

• Self-certify with SDUSD
  – except DVBE/SDVOB
## EBE Goals

### Business Ownership Classification

<table>
<thead>
<tr>
<th>Classification</th>
<th>Project EBE Goals*</th>
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<tbody>
<tr>
<td>Disabled Veteran-Owned Business Enterprise (DVBE/SDVOSB)**</td>
<td>3.0% Requirement</td>
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<td></td>
<td>5.0% Goal</td>
</tr>
<tr>
<td>Minority-Owned Business Enterprise (MBE)</td>
<td>8.0%</td>
</tr>
<tr>
<td>Women-Owned Business Enterprise (WBE)</td>
<td>7.0%</td>
</tr>
<tr>
<td>Small Business Enterprise (SBE)</td>
<td>40%</td>
</tr>
<tr>
<td>Overall EBE Goal***</td>
<td>50%</td>
</tr>
</tbody>
</table>

* EBE goals are announced each January  
** San Diego Unified has a 3% DVB participation requirement  
*** The overall goal is not a sum of the classifications
Join Our SDUSD Database

• Receive bid opportunity notifications  
  – Filtered to be relevant to your scope and specialties!
• Be found by other Contractors seeking new subcontractors/suppliers/professional services
• Fill out the form in under 2 minutes!
• Link: www.tinyurl.com/sdusd-dform

Note: This database is not associated with our Prequalification requirements/application
Want More Information?

- Email: Shucklebridge@sandi.net
- LLB Fact Sheet: www.tinyurl.com/sdusd-LLB
District LLB Prequalification

PREQUALIFICATION IS REQUIRED:
- **Prime Contractors:** A and B
- **Mechanical, Plumbing, Electrical (MEP):**
  - C4, C7, C10, C16, C20, C34, C36, C38, C42, C43, and C46
- **ALL Non-MEP Contractors:** All other license classifications.

PREQUALIFICATION DOES NOT APPLY TO:
- **Suppliers or Manufacturers**
How to Prequalify

https://www.sandiegounified.org/contractor-prequalification

Required Prequalification:

Projects of $1 million or more - Prequalification is required for the following contractors, regardless of the value of the prime and/or subcontractors' work on the project:

1. Prime Contractors: General contractors or any C-licensed contractor bidding as a prime contractor on projects of $1M or more. A key requirement for prequalifying as a Prime contractor is to provide project references for completed projects of $1M or more, where your company was the Prime contractor. Click here to view or download the pdf questionnaire for prequalification to bid $1M projects as a Prime contractor.

2. MEP Subcontractors: Mechanical, electrical, and plumbing subcontractors, including any contractor holding A or B licenses and/or performing work of C-4, C-7, C-10, C-16, C-20, C-34, C-36, C-38, C-42, C-43 and C-46 licenses. Click here to view or download the pdf questionnaire for prequalification to bid $1 Million projects as a subcontractor.

Click here for a current list of all $1M+ prequalified contractors. This list includes prequalified prime contractors eligible to bid with the district on projects of $1 million or more and mechanical, electrical and plumbing (MEP) subcontractors eligible to submit bids to bidding prime contractors. MEP prequalification expires one year from the date of approval.

Lease-Leaseback Projects - Prequalification is also required of all Non-MEP Subcontractors, regardless of trade, tier, or the value of the prime and/or subcontractors' work on the project.

1. Non-MEP Subcontractors are any contractors with a C or D license not referenced above. Click here to view or download the Non-MEP prequalification questionnaire to bid Lease-Leaseback projects as a Non-MEP subcontractor.

Click here for a list of prequalified Non-MEP subcontractors.
# MEP & Non-MEP

<table>
<thead>
<tr>
<th>Non-MEP</th>
<th>MEP</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-page Form Required</td>
<td>Extensive Form Required</td>
</tr>
<tr>
<td>No Supplemental Documentation Required</td>
<td>Supplemental Documentation Verification:</td>
</tr>
<tr>
<td></td>
<td>• Cal/OSHA 300 logs for past 3 years</td>
</tr>
<tr>
<td></td>
<td>• California Contractor’s License</td>
</tr>
<tr>
<td></td>
<td>• Certificate of Insurance</td>
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<tr>
<td></td>
<td>• Surety history for past 5 years</td>
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<tr>
<td></td>
<td>• Letter of Bondability</td>
</tr>
<tr>
<td></td>
<td>• Reviewed or Audited Financial Statement</td>
</tr>
<tr>
<td></td>
<td>• Cert of Licensed Accountant or Accountant’s license information</td>
</tr>
<tr>
<td>Renewal Required Annually</td>
<td>Renewal Required Annually</td>
</tr>
<tr>
<td>• Every February</td>
<td>• One year from date of approval</td>
</tr>
</tbody>
</table>

| Submittals:                                                             |                                                                       |
|                                                                        | • Must be submitted **10 days prior** to a project’s bid due date      |
|                                                                        | • Verify due date via project-specific schedule                       |
|                                                                        | • Not public record, and not open to public inspection                |
Labor Compliance

- See Labor Compliance Bulletin
  - New guidance regarding Prevailing Wages
  - Answers to Frequently Asked Questions
SDUSD Project Stabilization Agreement

• Agreement between SDUSD Board and SD County Building & Construction Trades Council/Southwest Regional Council of Carpenters
  – Applies to all LLB work
  – Applies to all contractors, regardless of tier, performing public works.

• How the PSA Works
  – PSA 101 Orientation – Contact PSA staff for schedule
Skilled & Trained Workforce

State law exempts public agencies that have adopted a Project Stabilization Agreement from the Skilled and Trained Workforce reporting requirements

– Accordingly, SDUSD LLB projects are exempt from Skilled & Trained Workforce reporting requirements
– SDUSD will accept and track subcontractors’ evidence of their workers’ Skilled & Trained workforce status through PSA operations
Thank you for joining us!

Q&A