



— PRESENTED BY —  
**SAN DIEGO UNIFIED SCHOOL DISTRICT**

Joint Lease-Leaseback Program Outreach Event

March 2022



**Tuesday**  
**March 1, 2022**  
**9:00 -10:00 AM**  
Zoom Webinar

**WELCOME**

# JOINT **LEASE-LEASEBACK** OUTREACH EVENT

Join San Diego Unified School District, C.W. Driver, McCarthy Builders and RNT Architects for information on four lease-leaseback subcontracting opportunities bidding between March and June 2022.

You will learn about each project's scope of work, project schedule, and estimated bid package values.

**There are plenty of opportunities for small and diverse businesses on these projects. Join us to find out more.**



*Bidding March 2022*

- Mira Mesa High School: Career Technical Education Engineering Technology
- Mira Mesa High School: Site Improvements



*Bidding May/June 2022*

- Wilson Middle School: Increment II Joint Use Field
- Central Elementary School: Solar Photovoltaic



# Abbreviations

- CTE = Career Technical Education
- GMP = Guaranteed Maximum Price
- LLB = Lease-Leaseback
- PV = Photovoltaic
- WSM = Whole Site Modernization



# 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

Audio Settings ^



Chat



Raise Hand



Q&A

Leave Meeting

- Questions will be addressed after all Primes have presented



# Housekeeping

- This event is going to be fast-paced; we have a lot of projects and project teams to introduce
  - Be ready to take notes!
- Please understand that we are limited to how many questions we can take today
- [Shucklebridge@sandi.net](mailto:Shucklebridge@sandi.net)

# Agenda



## Topic

Introduction & Housekeeping

District Business Outreach Program

Mira Mesa High School: CTE (Career Technical Education)

Mira Mesa High School: Site Improvements

- Scope presented by C.W. Driver

Doing Business With C.W. Driver

Central Elementary School: Solar Photovoltaic

Wilson Middle School: Increment II Joint Use Field

- Scope presented by RNT Architects

Doing Business With McCarthy Builders

District Prequalification

District Labor Compliance & Project Stabilization Agreement (PSA)

Q&A

Adjourn



# Doing Business With San Diego Unified School District



# Emerging Business Enterprise (EBE/XBE)

“EBE/XBE” is the 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**)
  - Federal **SDVOSB (CVE letter)**
  - Some other agency certifications
  - Some EBE organizations (**MSDC, WBENC**)
- Self-certify with SDUSD
  - Except **DVBE/SDVOSB**



# EBE/XBE Goals

## Business Ownership Classification

### Project EBE/XBE Goals\*

**Disabled Veteran-Owned Business Enterprise  
(DVBE/SDVOSB)\*\***

**3.0% Requirement**

**5.0% Goal**

**Minority-Owned Business Enterprise (MBE)**

**8.0%**

**Women-Owned Business Enterprise (WBE)**

**7.0%**

**Small Business Enterprise (SBE)**

**40%**

**Overall EBE/XBE Goal\*\*\***

**50%**

\* EBE/XBE 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](http://www.tinyurl.com/sdusd-dform)

**Note: This database is not associated with our Prequalification requirements/application**



# PlanetBids

- All publicly bid opportunities are posted to PlanetBids
- Register with your scope of work and be notified of opportunities when they're posted
- [TinyUrl.com/SDUSD-PlanetBids](https://tinyurl.com/SDUSD-PlanetBids)



# Want More Information?

- Email: [Shucklebridge@sandi.net](mailto:Shucklebridge@sandi.net)
- LLB Fact Sheet: [www.tinyurl.com/sdusd-LLB](http://www.tinyurl.com/sdusd-LLB)



## LEASE-LEASEBACK FACT SHEET

### ABOUT US

San Diego Unified School District's Facilities Planning and Construction Department has a robust Business Outreach Program designed to engage Emerging Business Enterprises (EBEs) and encourage participation in its construction projects. EBE is an umbrella term that includes women, minority, disabled veteran-owned, and small business enterprises.

Capital improvement bond funds Propositions S, Z, and Measure YV jointly provide about \$8.4 billion to design and construct clean, safe, environmentally friendly facilities that encourage successful teaching and learning at schools throughout the district.

Tens of millions of dollars are spent with EBEs each year. Don't miss out on these opportunities!

### EBE PARTICIPATION

With San Diego Unified's robust EBE goals, Primes and large subs are motivated to engage more EBEs on each project. In fact, bids are being packaged with EBE participation as a factor. EBE participation doesn't just focus on first tier subs, the EBE Program recognizes participation of lower tier subcontractors, materials suppliers, trucking companies, some consultants, and construction site support services!

LLB Goals	
Overall EBE Awards	50%
Disabled Veteran	5%
Minority-Owned	8%
Woman-Owned	7%
Small Business	40%

### LEASE-LEASEBACK & SUBCONTRACTING OPPORTUNITIES

San Diego Unified is using the Lease-Leaseback (LLB) delivery method for large and complex projects ranging in value from \$7 to \$120 million. LLB is a method that streamlines complex construction projects and frees up funding. It allows school districts to lease a school site to a contractor for a nominal fee. The contractor then builds the project and leases the property back to the district for a set period of time, after which the property's ownership reverts back to the district. LLB is more like a design-build delivery method, which differs from the district's more commonly used design-bid-build delivery method.

The district currently has plans to issue contracts for more than 70 LLB projects. Groups of prequalified Prime contractors have been created to meet the increased workload. The solicitations to develop the Prime groups are bid via public process, as required.

Each project, dependent on its size, is bid through solicitations only to those contractors in the relevant group of Prime contractors. Some contractors are in more than one group.

### What Subcontractors Need to Know

Understanding the LLB groups, rounds, and pools is mostly unnecessary for subcontractors and EBEs. The district will bid each project within a pool of contractors and award to the winning Prime. The Primes then take ownership of the project and have their own site walks, bidding processes, and due dates. It is immensely important for subcontractors to develop relationships with each of the contractors in the Prime pools (see contact info on reverse side).

### In addition to developing relationships with the Primes, here are some other things that subcontractors and EBEs can do to be poised to bid:

- Get on the SDUSD database
- Get prequalified with SDUSD
- Get prequalified with the LLB Prime contractors
- Apply for relevant EBE certifications
- Upgrade to SB-PW certification if your company owns its small business designation (see reverse side)

### LEASE-LEASEBACK PRIME CONTRACTORS





# Mira Mesa High School

# WELCOME!



# AGENDA

1. Welcome & Introductions
2. Mira Mesa High School Project Overview
3. C.W. Driver Prequalification

# INTRODUCTIONS:

- Samuel Myovich – C.W. Driver – Project Director
- Leanne Loera – C.W. Driver Outreach Coordinator & Estimating Admin

# BY THE NUMBERS

<b>#102</b> LICENSE NUMBER	<b>103</b> YEARS OLD	<b>300+</b> EMPLOYEES	<b>5-10</b> INTERNS PER YEAR
<b>80+</b> CLIENTS LAST YEAR	<b>4</b> SOCAL OFFICES	<b>90</b> IN-PROGRESS PROJECTS	<b>\$535M</b> REVENUE LAST YEAR
<b>31 YRS.</b> AVERAGE LEADERSHIP TENURE	<b>32</b> CSU PROJECTS	<b>\$3.7B+</b> EDUCATION PROJECTS	<b>0.70</b> INDUSTRY LEADING EMR

ARCHITECTS  
**MOSHER  
DREW**  
**C.W. Driver**  
BUILDERS SINCE 1919

Mira Mesa High School





# 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

# CTE Bid Packages

Bid Package No.	Trade Scope	CA License No.	Bid Package No.	Trade Scope	CA License No.
<b>1</b>	Final Clean	D-63	<b>8</b>	Glass & Glazing	C-17
<b>2</b>	Demolition	A or C-21, C-22	<b>9</b>	Drywall & Framing, Rough Carpentry, Insulation, Flooring, Fireproofing, Moving	B or C-2, C-5, C-9, C-15, C-35
<b>3</b>	Concrete, Reinforcing, Concrete Polishing	B or C-8	<b>10</b>	Acoustical Ceilings	C-2 or D-50
<b>4</b>	Structural Steel and Metal Fabrications	C-51	<b>11</b>	Painting & Graphic Wall Covering	C-33
<b>5</b>	Finish Carpentry / Countertops / Cabinets	C-6	<b>12</b>	Specialties	B or C
<b>6</b>	Roofing	C-39	<b>13</b>	Plumbing	C36
<b>7</b>	Doors and Hardware	D-28	<b>14</b>	HVAC	C20
			<b>15</b>	Electrical & Low Voltage	C10

# Athletics Fields Bid Packages

Bid Package No.	Trade Scope	CA License No.	Bid Package No.	Trade Scope	CA License No.
1	Survey	A	10	Painting	C-33
2	Erosion Control	A	11	Specialties	B or C
3	Final Clean	D-63	12	Plumbing	C-36
4	Concrete and Reinforcing	A or B, C-8	13	HVAC	C-20
5	Masonry	C-29	14	Electrical & Low Voltage	C-7, C-10
6	Structural Steel and Metal Fabrications	C-51	15	Earthwork and Demolition	C-12
7	Finish Carpentry/Countertops	C-6	16	Site Concrete	A or B, C-8
8	Roofing and Sheet Metal Flashing	C-39	17	Fences and Gates	C-13
9	Metal Stud Framing and Gypsum, Rough Carpentry, Insulation, Flooring, Door, Frames and Hardware	B or C-2, C-5, C-9, C-15, D-28	18	Landscape & Irrigation	C-27
			19	Site Utilities	A or C-34, C-36



# Mira Mesa High School



# Mira Mesa High School

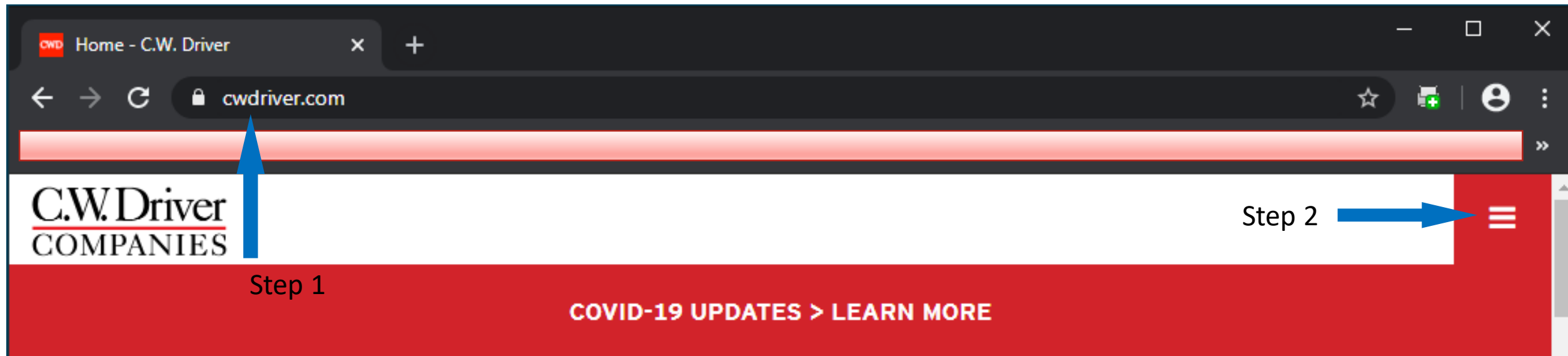
# Mira Mesa High School Quick Facts

- Estimated Value: \$62mil
- Bid Advertisement:
  - GMP#1 – CTE – Mar 2022
  - GMP#2 – Fields – Mar 2022
  - GMP#3 – WSM – November 2022
- Construction Start:
  - GMP#1 – CTE – July 2022
  - GMP#2 – Fields – July 2022
  - GMP#3 – WSM – January 2023
- Total Duration: 38 Month
- Complete: September 2025

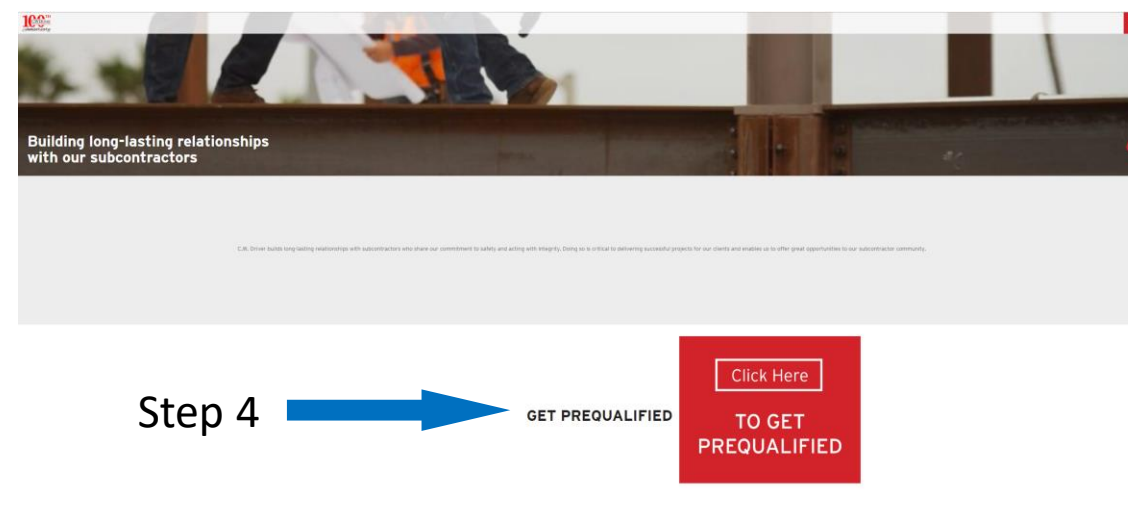
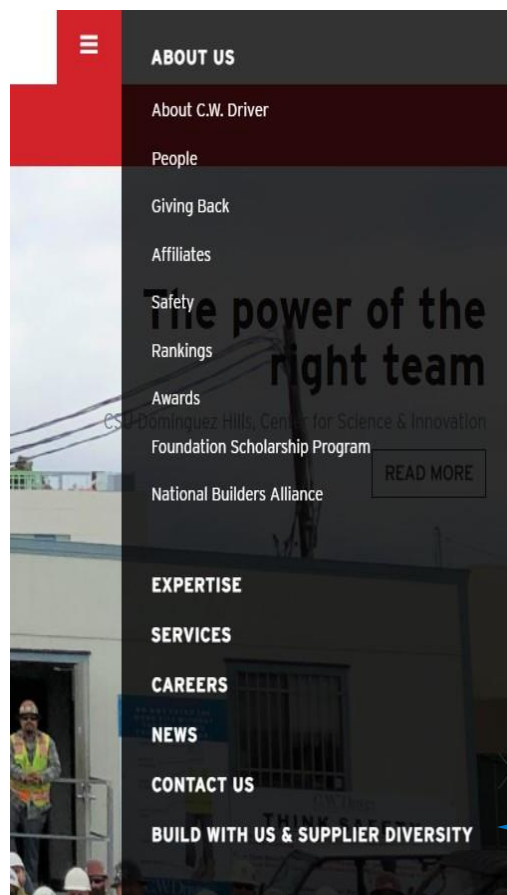


# How to Prequalify with C.W. Driver

- Step 1 - Go to cwdriver.com
- Step 2 - Click on the Menu Tab



# How to Prequalify with C.W. Driver



# 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](mailto:Lloera@cwdriver.com)

Prequalification Coordinator

Jamie Ballesteros

[prequalification@cwdriver.com](mailto:prequalification@cwdriver.com)

C.W. Driver San Diego Office

7588 Metropolitan Dr.

San Diego, CA, 92108

619.696.5100

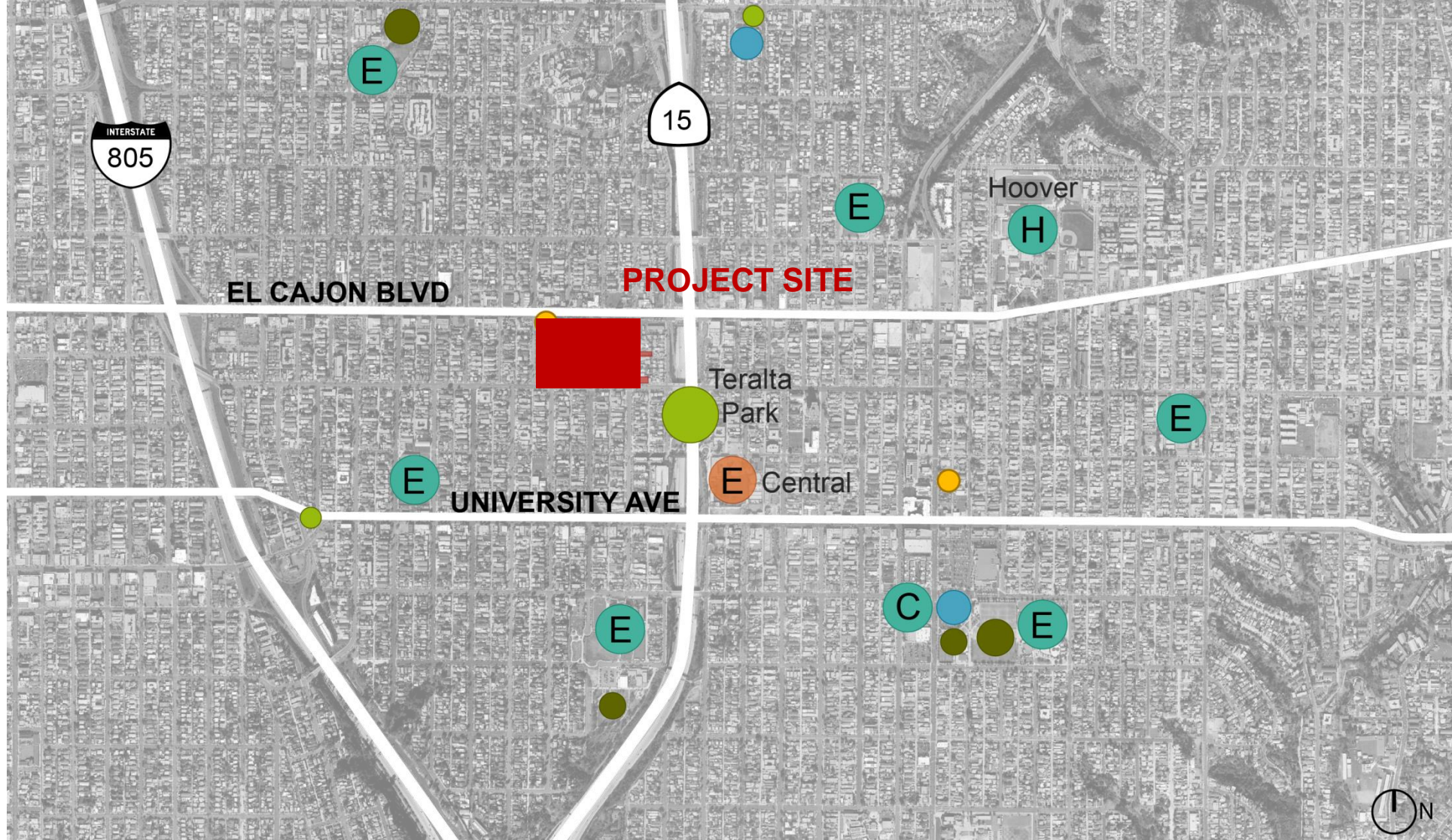


# Wilson Middle and Central Elementary Schools



**WILSON MIDDLE AND CENTRAL ELEMENTARY SCHOOLS**  
**OUTREACH EVENT**  
MARCH 1, 2022



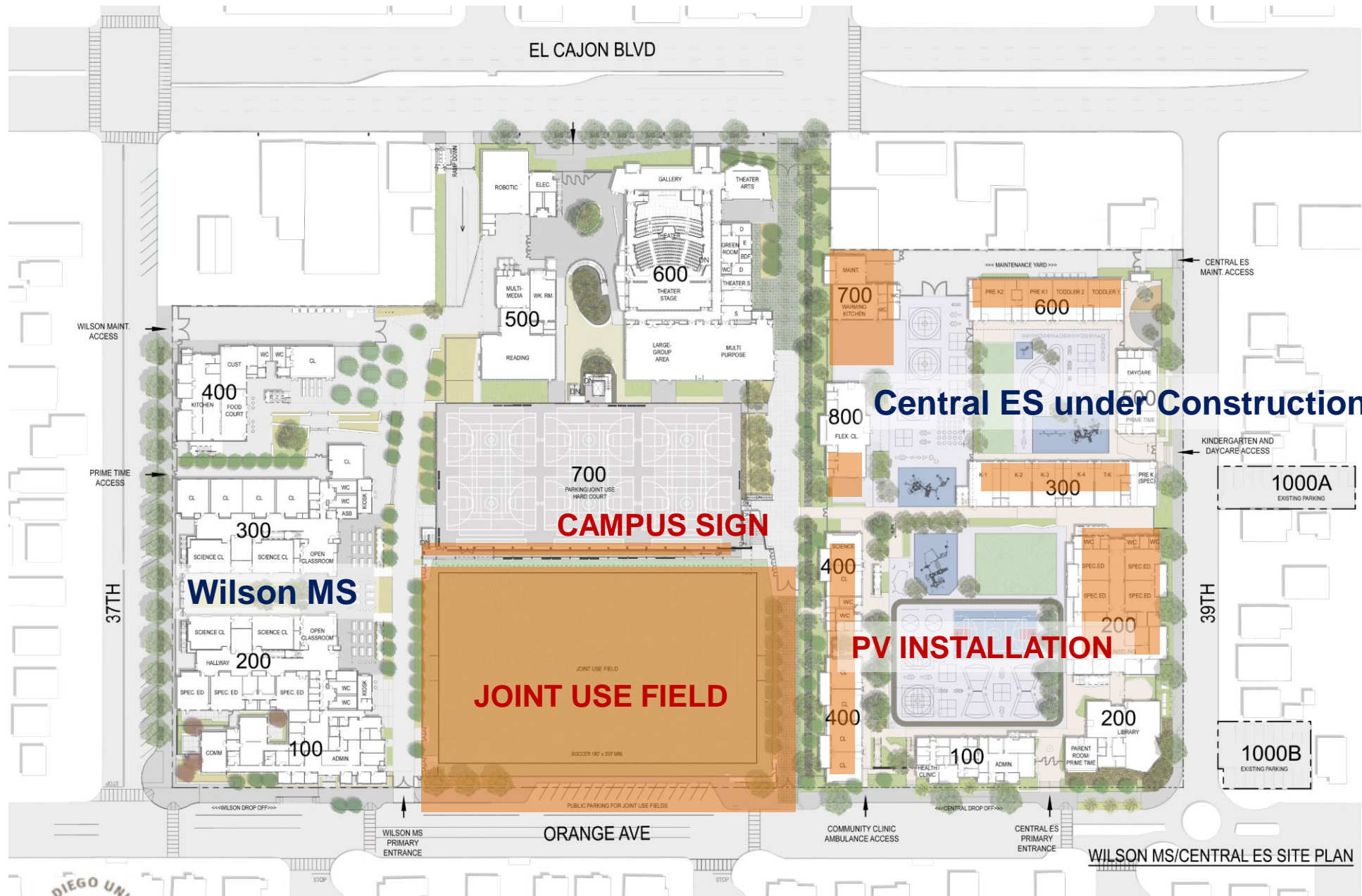


## LEGEND

- |                             |                   |
|-----------------------------|-------------------|
| ● Wilson Middle School      | ● College         |
| ● Central Elementary School | ● Library         |
| ● Elementary School         | ● Joint Use Field |
| ● Middle School             | ● Park            |
| ● High School               | ● Landmark        |

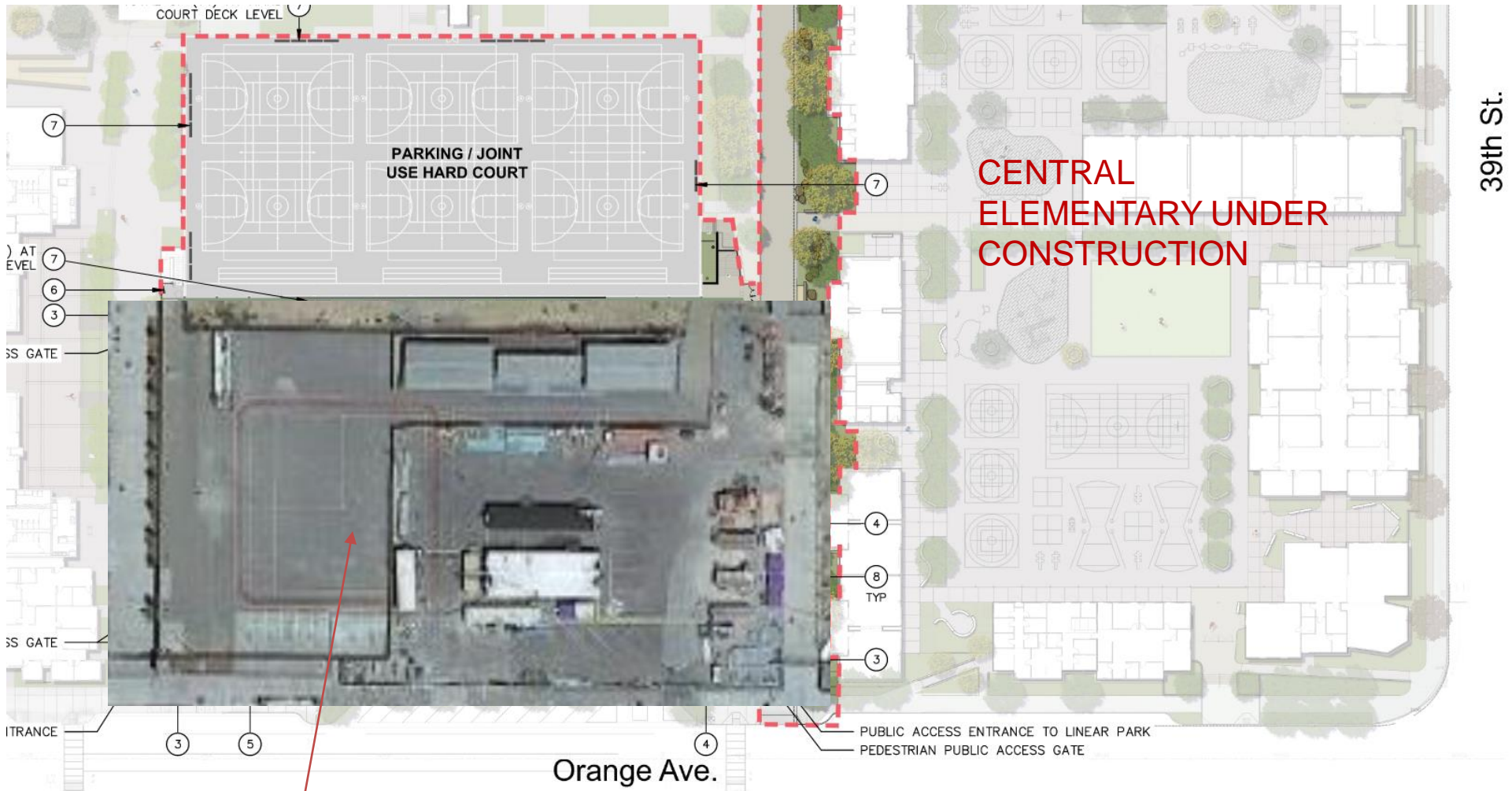
## Location – Wilson MS and New Central ES

Roesling Nakamura Terada Architects



## Scope Overview

Roesling Nakamura Terada Architects



**Demolition of AC/Concrete paving**

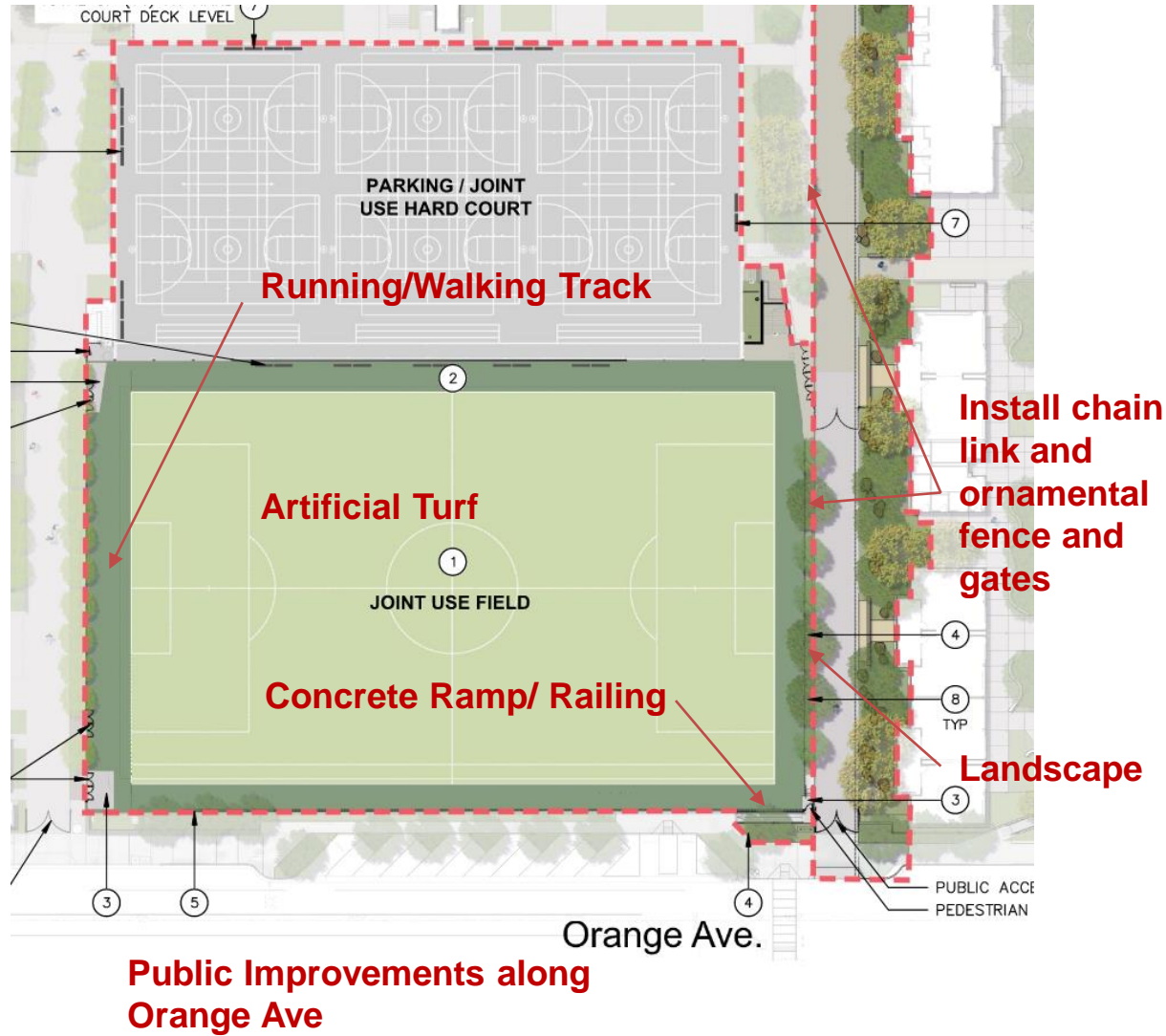


## Wilson MS – Joint Use Field

Roesling Nakamura Terada Architects

## JUF Scope Overview

- Over-Excavation/Grading
- Storm Drain
- Artificial Turf
- CIP Walls
- Site Furnishings
- Landscape
- Owner Furnished Fence
- Public Improvements
- Chain Link Fence



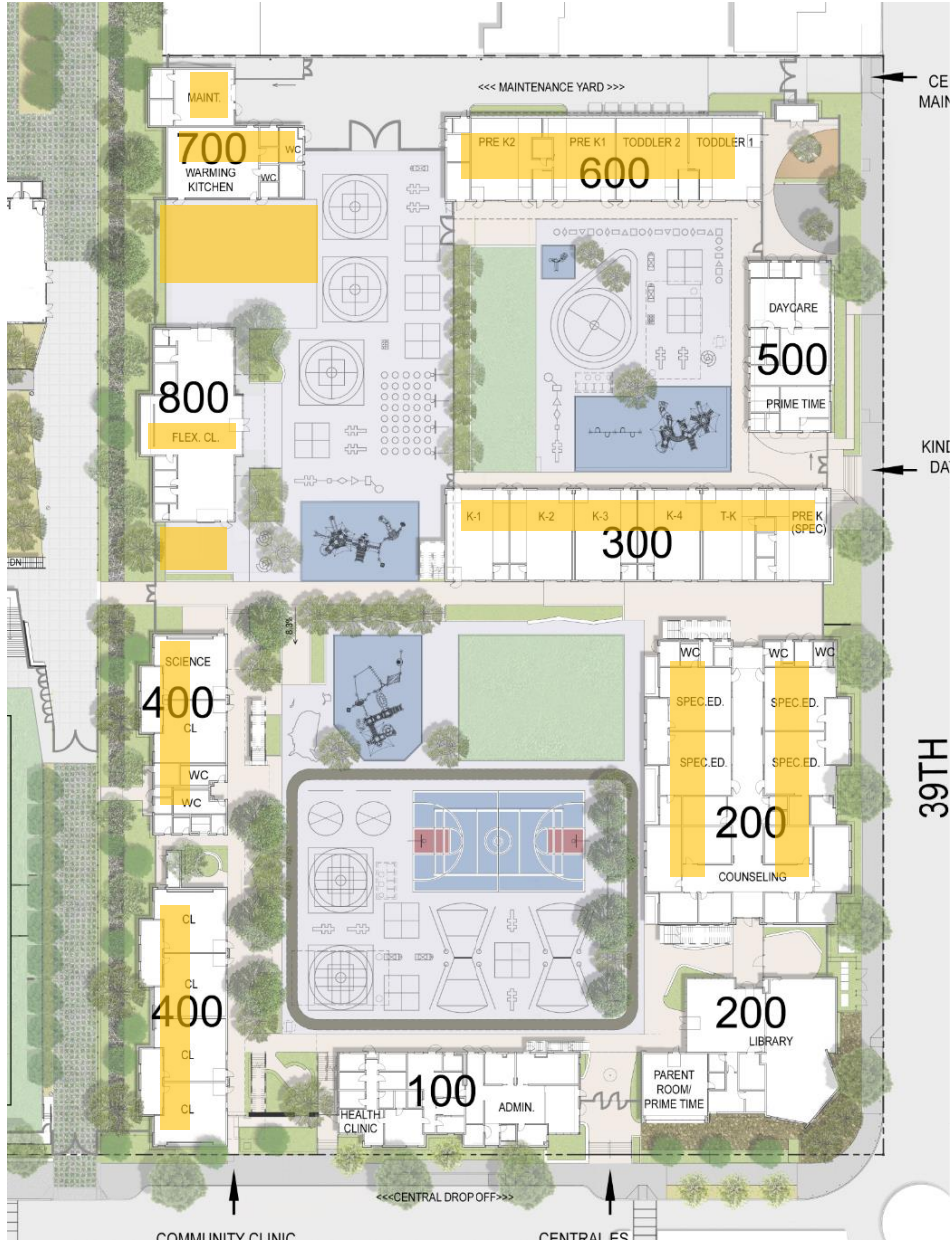
## Wilson MS – Joint Use Field

Roesling Nakamura Terada Architects



## Wilson MS – Campus Signage

Roesling Nakamura Terada Architects



## PV LOCATIONS

- BUILDING 200
- BUILDING 300
- BUILDING 400
- BUILDING 600
- BUILDING 700
- BUILDING 800
- LUNCH SHELTER



## CENTRAL ES – PV SCOPE

Roesling Nakamura Terada Architects



## McCarthy Team Intro

- Craig Swenson – McCarthy VP Project Executive  
[CSwenson@McCarthy.com](mailto:CSwenson@McCarthy.com)
- Ryan Miller – McCarthy Sr Project Manager  
[REMiller@McCarthy.com](mailto:REMiller@McCarthy.com)
- Lisa Simon – McCarthy Sr Project Administrator  
[LSimon@McCarthy.com](mailto:LSimon@McCarthy.com)
- Amanda Corbet – McCarthy Director Community Outreach and Inclusion  
[ACorbet@McCarthy.com](mailto:ACorbet@McCarthy.com)
- Jordan Miles – McCarthy Project Assistant Manager  
[JMiles@mccarthy.com](mailto:JMiles@mccarthy.com)
- Ahmad Naeel – McCarthy Project Assistant Manager  
[ANaeel@McCarthy.com](mailto:ANaeel@McCarthy.com)

# Upcoming GMP Packages

- GMP 2 – PV Package
  - Electrical
- GMP 3 – Mix Use Field
  - Onsite/Offsite Improvements
    - Demo
    - Earthwork
    - Site Concrete
    - AC Paving
    - Site Utilities
    - Landscape and Irrigation
    - Site Furnishings
    - Fencing

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# Central ES PV Scope



## PROCUREMENT

- McCarthy Managing the Procurement
- Documents will be available via <https://app.buildingconnected.com/>
- Single Subcontractor – Electrical
- DSA Approved PV Design
- Bids Will Turn into McCarthy's San Diego Office
- Best Value Evaluation
- Bid Bonds – Required with Bid if > \$100,000
- Performance & Payment Bonds – Yes or McCarthy CDI Program
- EBE / DVBE Goals

## PROCUREMENT SCHEDULE

- Advertise – May
- Bids Due – June
- Award – Board Approval September

## PROJECT SCHEDULE

- Approximately 7 Months including Submittals / Shop Drawings and Installation



## Wilson MS Mix Use Field

### PROCUREMENT

- McCarthy Managing the Procurement
- Documents will be available via <https://app.buildingconnected.com/>
- Subcontracting at the Trade Level – Package TBD
- Bids Will Turn into McCarthy's San Diego Office
- Best Value Evaluation
- Bid Bonds – Required with Bid if > \$100,000
- Performance & Payment Bonds – Yes or McCarthy CDI Program
- EBE / DVBE Goals

### PROCUREMENT SCHEDULE

- Advertise – May
- Bids Due – June
- Award – Board Approval September

### PROJECT SCHEDULE

- Approximately 12 Months including Submittals / Shop Drawings and Installation

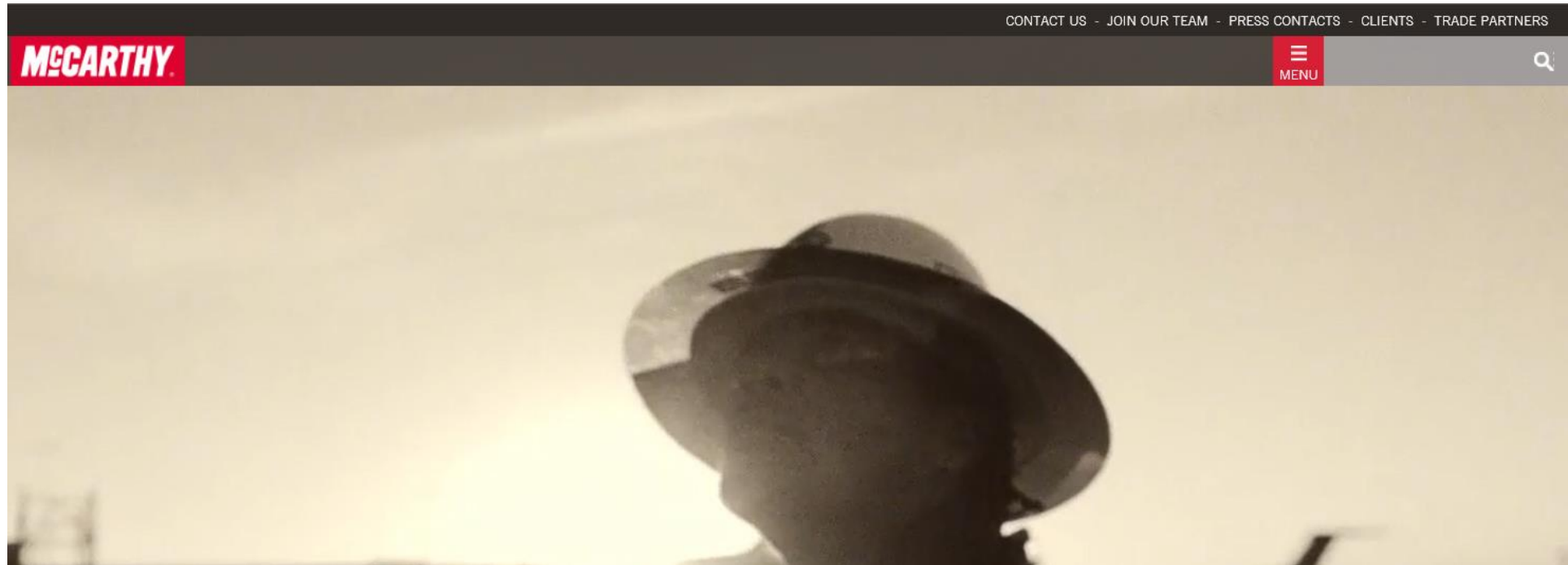
# McCarthy



## Prequalification

# — Prequalification Process

<https://www.mccarthy.com/>



# — Prequalification Process

<https://www.mccarthy.com/>

## Trade Partners

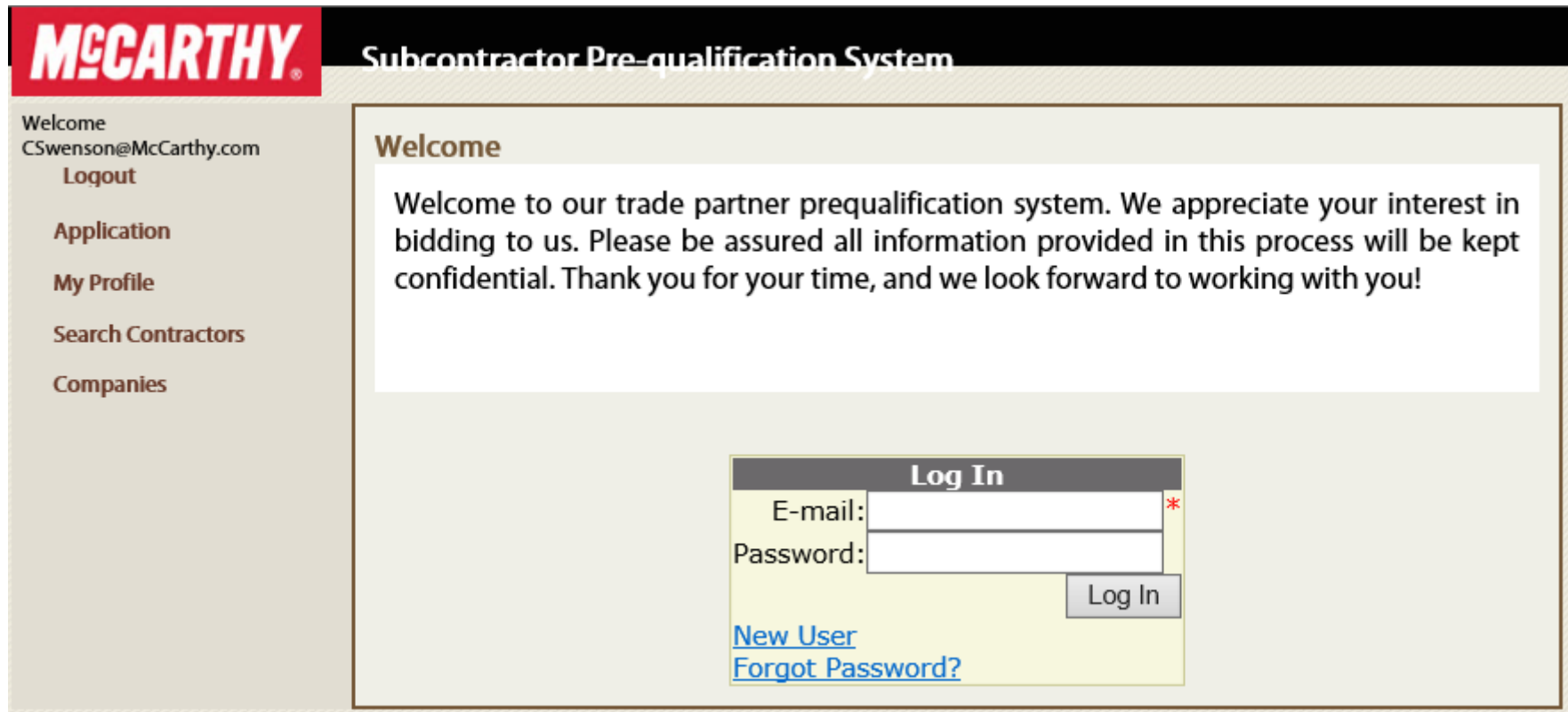
### Trade Partners Prequalification

TRADE PARTNERS  
PREQUALIFICATION



# — Prequalification Process

<https://www.mccarthy.com/>



The screenshot shows the login interface for the McCarthy Subcontractor Pre-qualification System. On the left is a sidebar with the McCarthy logo and navigation links. The main content area has a welcome message and a login form. The login form includes fields for E-mail and Password, a Log In button, and links for New User and Forgot Password.

**McCARTHY** Subcontractor Pre-qualification System

Welcome  
CSwenson@McCarthy.com  
Logout

Application  
My Profile  
Search Contractors  
Companies

**Welcome**

Welcome to our trade partner prequalification system. We appreciate your interest in bidding to us. Please be assured all information provided in this process will be kept confidential. Thank you for your time, and we look forward to working with you!

**Log In**

E-mail:  \*

Password:

Log In

[New User](#)  
[Forgot Password?](#)

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## McCarthy Prequal



### Two Tier Prequalification

Tier 1 – Basic Company  
Information, Surety  
Reference Letter, Bank  
Reference Letter  
❖ Eligible to receive a  
subcontract with McCarthy

Tier 2 – Same as above, plus  
Audited/Reviewed  
Financial Statements  
❖ Eligible to be enrolled in  
McCarthy's CDI program



## **San Diego Unified Presentations:**

1. District Prequalification
2. Labor Compliance
3. Project Stabilization Agreement (PSA)



# 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

[Prequal@sandi.net](mailto:Prequal@sandi.net)



## Non-MEP

One-page Form Required

No Supplemental Documentation Required

**APPLY  
TODAY!**

Renewal Required Annually  
• **Every February**

## MEP

Extensive Form Required

Supplemental Documentation Verification:

- Cal/OSHA 300 logs for past 3 years
- California Contractor's License
- Certificate of Insurance
- Surety history for past 5 years
- Letter of Bondability
- Reviewed or Audited Financial Statement
- Cert of Licensed Accountant or Accountant's license information

Renewal Required Annually  
• One year from date of approval

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
- Schedule PSA Training:
  - Lynn Kuhns Hughes [lkuhnshughes@sandi.net](mailto:lkuhnshughes@sandi.net)
- PSA Website: [www.sandiegounified.org/PSA](http://www.sandiegounified.org/PSA)



# 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

# Q & A





# Links and Emails

- PlanetBids Website – [Tinyurl.com/SDUSD-PlanetBids](https://Tinyurl.com/SDUSD-PlanetBids)
- LLB Website – [sandiegounified.org/LLB-Outreach](https://sandiegounified.org/LLB-Outreach)
- Sidney's Email – [Shucklebridge@sandi.net](mailto:Shucklebridge@sandi.net)
- District Prequal Email – [PreQual@sandi.net](mailto:PreQual@sandi.net)
- PSA Website – [sandiegounified.org/PSA](https://sandiegounified.org/PSA)
- Schedule PSA Training - [lkuhnshughes@sandi.net](mailto:lkuhnshughes@sandi.net)
- C.W. Driver Subcontractor Outreach, Leanne Loera, [Lloera@cwdriver.com](mailto:Lloera@cwdriver.com)
- Prequalification Coordinator, Jamie Ballesteros, [prequalification@cwdriver.com](mailto:prequalification@cwdriver.com)
- Ryan Miller – McCarthy Sr Project Manager, [REMiller@McCarthy.com](mailto:REMiller@McCarthy.com)
- Amanda Corbet – McCarthy Director Community Outreach and Inclusion, [ACorbet@McCarthy.com](mailto:ACorbet@McCarthy.com)



— PRESENTED BY —  
**SAN DIEGO UNIFIED SCHOOL DISTRICT**

Thank you for joining us today