



— PRESENTED TO —  
**CONSTRUCTION NETWORK**

**SDUSD's Propositions S & Z and Measures YY & U Capital Improvement Bond Program**

**October 18, 2023**





# Good Morning!

- Karen Linehan, Business Outreach Program Manager
  - Facilities Planning & Construction
    - Capital Improvement Bond Program



*New Wilson Middle School Campus*



*Canyon Hills High School/Mat Kwatup KunKun*





# Facilities Planning & Construction

## “FPC”

*Design and construct clean, safe, environmentally friendly facilities that encourage successful teaching and learning*

- Facility improvement and maintenance projects
- Capital facilities bond projects—typically larger and more complex projects: Props. S, Z and Measures YY, U



Logan Memorial Educational Campus



Central Elementary School - New Campus



# Capital Improvement Bond Program

## \$11.6 BILLION

- **Prop. S** - \$2.1 billion general obligation bond measure
  - Repair, renovate and revitalize 181 schools
  - Projected duration: 2033
- **Prop. Z** - \$2.8 billion general obligation bond measure
  - Repair and renovate every school in the district
  - Projected duration: 2025
- **Measure YY** - \$3.5 billion general obligation bond measure
  - Applies to all educational facilities across the district
  - Projected duration: 2029
- **Measure U** - \$3.2 billion general obligation bond measure
  - Applies to all facilities across the district
  - Projected duration: 2035





Requirements & Things You Should Know



# Prequalification

Prequalification is required on all:

- School construction projects over \$1 million
- Lease-Leaseback (LLB) projects
- Painting-only projects
  - Prime contractors only, licenses B, C-33

Applies to:

- General contractors (renew yearly)
- MEP subcontractors
- All Non-MEP subcontractors, all tiers for LLB

Get prequalified ***IN TIME TO BID!***

\*\*\* Get prequalified with each Prime contractor \*\*\*

**[sandiegounified.org/contractor-prequalification](https://sandiegounified.org/contractor-prequalification)**





# Project Stabilization Agreement (PSA)

## Agreement between SDUSD Board of Education and San Diego/Imperial County Building & Construction Trades Council

- Approved July 2009
- Applies to projects exceeding \$1M estimated value; funded by state school construction bonds; or Job Order Contracts (JOC)

## PSA Training

- One-on-one sessions with Ivory Anderson: [ianderson1@sandi.net](mailto:ianderson1@sandi.net)
- Project-specific training: internal staff, project team, subs session, etc.



# Disabled Veteran Business (DVB)

- May 10, 2011 – Board Resolution H.3
  - **Requires** 3% DVBE/SDVOSB participation
  - Mirrors State amendment to PCC
  - Eliminates “Good Faith Effort”
  - SDUSD accepts valid and current:
    - California DGS DVBE certification
    - SBA’s SDVOSB certification





# Case Study





# THE VISION

Build a new headquarters for San Diego Unified School District to replace the education center at 4100 Normal Street



**George Walker Smith Education Center**





# George Walker Smith Education Center

- Phase I – Site acquisition
- Phase II – Parking structure
  - \$40M construction estimate
  - 6-story, 180k-200k, SF for ~420 cars
  - Begin construction by summer 2024; complete by summer 2025
- Phase III – New Construction and existing building renovation
  - \$115M construction estimate
  - Renovate existing 150k SF building
  - Add ~40k SF of new construction for 2-story building
  - City submittal by early 2024; permits by end of 2024 (no DSA)
  - Construction start in early 2025 and complete by end of 2026
  - Includes auditorium and administrative offices





# Lease-Leaseback Contractors

**Balfour Beatty**

**Barnhart-Reese**  
CONSTRUCTION, INC.  
A JCB Company

**CLARK**  
CONSTRUCTION

**C.W. Driver**  
COMPANIES



Erickson-Hall Construction  
An Employee Owned Company

**LEVEL 10**  
CONSTRUCTION



**NEXGEN**  
BUILDING GROUP, INC.



CONSTRUCTION



**SUNDT**



**Turner**  
Construction Company





# Lease-Leaseback Fact Sheet

[sandiegounified.org/LLB-outreach](http://sandiegounified.org/LLB-outreach)



## 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 small and diverse business enterprises (XBEs) and encourage participation in its construction projects. XBE is an umbrella term that includes woman-, minority-, disabled veteran-owned, and small business enterprises.

Capital improvement bond funds Propositions S/Z, and Measures YY/U, jointly provide about \$1.6 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 XBEs each year. Don't miss out on these opportunities!

### XBE PARTICIPATION

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

#### LLB Goals

Overall XBE 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 subs is mostly unnecessary for subcontractors and XBEs. 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 XBEs can do to be poised to bid:

- Get on the SDOUSD database
- Get prequalified with SDOUSD
- Get prequalified with the LLB Prime contractors
- Apply for relevant XBE certifications
- Upgrade to SP-PW certification if your company outgrows its small business designation

### LEASE-LEASEBACK PRIME CONTRACTORS



### PREQUALIFICATION FOR LLB PROJECTS

All subcontractors are required to be prequalified with San Diego Unified for LLB projects in order to bid.

Information about LLB Prequalification can be found here: <http://www.sandiegounified.org/contractor-prequalification>. Email: [prequal@sandi.net](mailto:prequal@sandi.net) with any questions. In addition, each Prime contractor may also have their own prequalification requirements.

Category	Prequal	NO Prequal
MEP*	●	
Non-MEP	●	
Suppliers	●	
Equipment Providers	●	

\*Mechanical, Electrical, Plumbing CA, CZ, C-10, C-16, C-18, C-19, C-20, C-21, C-22, C-23, C-24, C-25

### CONTACT INFO

**Sidney Hucklebridge-Key**  
Lease-Leaseback Outreach Coordinator  
[shucklebridge@sandi.net](mailto:shucklebridge@sandi.net)  
Tel: 619.471.4960

**Karen A. Linehan**  
Outreach Program Manager  
[klinehan@sandi.net](mailto:klinehan@sandi.net)

### KEY LINKS

- **Business Outreach**  
[www.sandiegounified.org/business-outreach](http://www.sandiegounified.org/business-outreach)
- **PlanetBids** (see also Solicitations)  
[www.sandiegounified.org/planetbids](http://www.sandiegounified.org/planetbids)
- **Planroom** (view plans by trade)  
<http://www.sandiegounified.org/planroom>
- Click on "Public Jobs"
- Click on project name for plans, specs, addenda
- **Karen's LinkedIn Page**  
[linkedin.com/in/karenlinehan](https://www.linkedin.com/in/karenlinehan)
- **Twitter** @sdusd\_bizoutreach

### PROJECT STABILIZATION AGREEMENT

San Diego Unified's PSA applies to projects exceeding \$1 million. Therefore, all LLB projects are subject to the agreement. To learn more about the PSA, get a copy, or meet one-on-one with the PSA Coordinator, contact Ivory Anderson: [landerson@sandi.net](mailto:landerson@sandi.net). If you would like to schedule a PSA training session for your office or subcontractors, contact Karen Linehan: [klinehan@sandi.net](mailto:klinehan@sandi.net).

### CONNECT WITH LLB PRIMES

Developing active relationships with each Prime's Small Business Liaison Officer (SBLIO) and getting prequalified will ensure your company is notified of all applicable LLB opportunities.

**Balfour Beatty Construction**  
Ivory Anderson Email: [adanderson@balfourbeattyus.com](mailto:adanderson@balfourbeattyus.com)  
Prequalification: <https://prequal.balfourbeattyus.com/creatoreuser>

**Barnhart-Reese Construction**  
Irma Arce Email: [IArce@BarnhartReese.com](mailto:IArce@BarnhartReese.com)  
Prequalification: [dfozans@BarnhartReese.com](mailto:dfozans@BarnhartReese.com)

**Clark Construction**  
Molly Huddleston Email: [molly.huddleston@clarkconstruction.com](mailto:molly.huddleston@clarkconstruction.com)  
Prequalification: <https://clarkextranet.com/>

**C. W. Driver**  
Leanne Loera Email: [lloera@cwdriver.com](mailto:lloera@cwdriver.com)  
Prequalification: [www.cwdriver.com/build-with-us](http://www.cwdriver.com/build-with-us)

**Erickson-Hall Construction**  
Summer Lumpkin Email: [slumpkin@ericksonhall.com](mailto:slumpkin@ericksonhall.com)  
Prequalification: [ericksonhall.com](http://ericksonhall.com)

**Level 10 Construction**  
Tamra Rhine Email: [trhine@level10gc.com](mailto:trhine@level10gc.com)  
Prequalification: [www.level10gc.com/subcontractors/](http://www.level10gc.com/subcontractors/)

**McCarthy Building Companies**  
Michael Herrera Email: [MDHerrera@McCarthy.com](mailto:MDHerrera@McCarthy.com)  
Prequalification: [www.mccarthys.com/subcontractors](http://www.mccarthys.com/subcontractors)

**Nexgen Building Group**  
Kim Anderson Email: [Kim@nexgenbuilding.com](mailto:Kim@nexgenbuilding.com)  
Prequalification: <http://bit.ly/Nexgen-Prequal>

**PCL Construction Services**  
Breana Weaver Email: [bdweaver@pcl.com](mailto:bdweaver@pcl.com)  
Prequalification: <https://www.pcl.com/partners-in-building/pages/sub-contractor-and-supplier-registration.aspx>

**Soltek Pacific**  
Ana Alsopara-Rebelin Email: [sblo@soltekpacific.com](mailto:sblo@soltekpacific.com)  
Prequalification: <http://www.soltekpacific.com/small-business/>

**Sundt Construction**  
Jackie Guillocci Email: [jguillocci@sundt.com](mailto:jguillocci@sundt.com)  
Prequalification: [www.tinyurl.com/SundtPrequal](http://www.tinyurl.com/SundtPrequal)

**Swinerton Builders**  
Kim Patton Email: [kpattton@swinerton.com](mailto:kpattton@swinerton.com)  
Prequalification: [www.swinerton.com/subcontractors/subcontractor-prequal](http://www.swinerton.com/subcontractors/subcontractor-prequal)

**Turner Construction Company**  
Vera Howell Email: [vhowell@tcc.com](mailto:vhowell@tcc.com)  
Prequalification: [www.turnerconstruction.com/sub-contractors](http://www.turnerconstruction.com/sub-contractors)

### LEASE-LEASEBACK

**BUSINESS OUTREACH PROGRAM** Facilities Planning & Construction  
4860 Ruffner Street, Room 9, San Diego, CA 92111-1522





# Looking Ahead...

There are Great Opportunities on the Horizon!





## Contracting Opportunities

# Construction Contracts - 2024

- Classroom Technology Upgrades (\$25M)
- College Technical Education (CTE) (\$5M-\$8M)
- Field Replacement (\$100K-\$2.4M)
- Hydration Clean Water (\$4M total)
- Joint Use Fields (JUF) (\$4M-\$5M)
- Kitchen Remodels (\$500K-\$1M ea)
- Marquee (\$125K-\$1.7M)
- New Building (\$10M-35M)
- Security Fencing (\$50K-\$800K)
- Shade Shelter (\$150K-350K)
- Single Point of Entry (\$20K-\$260K)
- Solar Photovoltaic (\$900K-\$3M)
- Whole Site Modernization (\$600K-\$1.15M)





Contracting Opportunities (cont.)

# Construction Contracts

## 2025-2029

- Classroom Technology Upgrades \$25M Annually
- Joint Use Fields (JUF) \$4M-\$5M
- Kitchen Remodels (\$500k-\$1M ea)
- Modernization \$1.5M-\$70M
- New Building \$10M-35M
- Security: Fencing/Single Point of Entry/PA Systems (\$100K-\$1.5M)
- Shade Shelter Projects (\$150K-\$250K)





# Contracting Opportunities

# Professional Services

## 2023-2024 (TBD)

- Battery Energy Storage Systems (BESS)
- Civil Engineering & Land Surveying
- Electrical Engineering
- Electric Vehicle Charging Solutions
- Geotechnical Engineering & Construction Material Testing
- Hazmat
- Landscape Architects
- Mechanical Engineering
- Reprographics Services

## 2025-2029 (TBD)

- Architectural Design Services
- Capital Bond Supplemental Support Services
- DSA Inspectors
- Preliminary Endangerment Assessment (PEA) Removal Action Plan (RAW)
- Stormwater Pollution Prevention Plan (SWPPP)





# Professional Services Supplemental Services Primes

- The district has 3 incumbent supplemental services providers

- **AECOM** 

- **Gafcon**



- **Harris & Associates**



**Harris & Associates.**

- Subcontracting opportunities for consultants
- XBE goals apply





# Tracking Bids & Solicitations

- Register on PlanetBids!
- Get on the database
- Read *San Diego Daily Transcript*
- Review the plans & specs
- Prequalify with San Diego Unified
- Prequalify with district Prime contractors
- Create a profile and use LinkedIn
- **Start attending site walks!**







# Business Outreach Program





# Business Outreach Program

- Promote doing business with San Diego Unified School District
- Inform contractors and subcontractors
- Connect stakeholders, contractors
- Help GCs meet X business enterprise (XBE) goals/requirements
- Special focus on target communities
- Engage XBEs





# Business Outreach Program

## EBE/XBE Goals

### Business Ownership Classification

### XBE Goals\*

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

**5.0%**

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

**8.0%**

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

**7.0%**

**Small Business Enterprise (SBE)**

**40.0%**

**Total XBE Participation \*\***

**50.0%**

\* The overall goal is not the sum of classifications

\*\* San Diego Unified has a 3% DVB participation requirement



Results:

# Construction (so far...)

<b>TOTAL Construction Dollars Awarded</b> (Cumulative since Jan. 2009)	<b>\$1,194,226,693</b>	
<b>Emerging Business Enterprise (EBE) Classification</b>	<b>\$</b>	<b>%</b>
<b>TOTAL EBE Dollars Awarded to Date</b>	<b>\$1,194,226,693</b>	<b>44.32%</b>
<b>Disabled Veteran Business Enterprise (DVBE)</b>	<b>\$158,204,460</b>	<b>5.87%</b>
<b>Minority-Owned Business Enterprise (MBE)</b>	<b>\$265,654,953</b>	<b>9.86%</b>
<b>Women-Owned Business (WBE)</b>	<b>\$234,738,127</b>	<b>8.71%</b>
<b>Small Business Enterprise (SBE)</b>	<b>\$1,002,830,910</b>	<b>37.22%</b>





Results:

# Professional services (so far...)

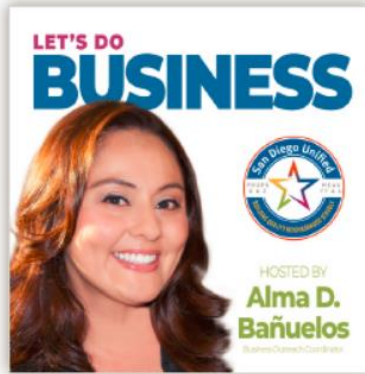
<b>TOTAL Dollars Awarded</b> <i>(Period of performance: March 2017 to June 2023)</i>	<b>\$59,470,327</b>	
<b>Emerging Business Enterprise (EBE) Classification</b>	<b>\$</b>	<b>%</b>
<b>TOTAL EBE Dollars Awarded to Date</b>	<b>\$26,770,774</b>	<b>45.02%</b>
<b>Disabled Veteran Business Enterprise (DVBE)</b>	<b>\$1,994,000</b>	<b>3.35%</b>
<b>Minority-Owned Business Enterprise (MBE)</b>	<b>\$8,000,512</b>	<b>13.45%</b>
<b>Women-Owned Business (WBE)</b>	<b>\$3,316,054</b>	<b>5.58%</b>
<b>Small Business Enterprise (SBE)</b>	<b>\$26,770,774</b>	<b>45.02%</b>



# PODCAST: LET'S DO BUSINESS!

San Diego Unified's 5-part podcast series hosted by our own Alma D. Bañuelos

## CONSTRUCTION INDUSTRY: TUNE IN TO YOUR NEW FAVORITE PODCAST



Gain valuable insight into how to grow your business by partnering with government agencies.

Join the construction department's resident small business specialist, Alma Bañuelos as she brings a fun and lively approach to her conversations with local industry experts.

Whether you are a new business owner or looking to grow an established firm, this podcast is for you!

— SEARCH —  
**LET'S DO BUSINESS SAN DIEGO**  
on your favorite podcast platform



### Check out our PREPARING FOR PUBLIC WORKS Series

<p><b>LET'S DO BUSINESS</b> PREPARING FOR PUBLIC WORKS SERIES INTRODUCTION SPECIAL GUEST: Karen Linehan HOSTED BY: Alma D. Bañuelos EPISODE 1 • (31 min.)</p>	<p><b>LET'S DO BUSINESS</b> PREPARING FOR PUBLIC WORKS OVERVIEW OF GOVERNMENT CONTRACTS SPECIAL GUEST: Mike Sabelfino HOSTED BY: Alma D. Bañuelos EPISODE 2 • (27 min.)</p>	<p><b>LET'S DO BUSINESS</b> PREPARING FOR PUBLIC WORKS MAKING FAVORABLE FIRST IMPRESSIONS WITH PUBLIC AGENCIES SPECIAL GUEST: Damian Singleton HOSTED BY: Alma D. Bañuelos EPISODE 3 (33 min.)</p>	<p><b>LET'S DO BUSINESS</b> PREPARING FOR PUBLIC WORKS RESPONDING TO GOVERNMENT BID SOLICITATIONS SPECIAL GUEST: Tanya Counts HOSTED BY: Alma D. Bañuelos EPISODE 4 • (35 min.)</p>	<p><b>LET'S DO BUSINESS</b> PREPARING FOR PUBLIC WORKS PREVAILING WAGES, PSA &amp; CONTRACT COMPLIANCE SPECIAL GUEST: George Harris III HOSTED BY: Alma D. Bañuelos EPISODE 5 • (38 min.)</p>
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# More Information

- LLB Fact Sheet, Newsletter, Brochure: [www.sandiegounified.org/Collateral](http://www.sandiegounified.org/Collateral)

**LEASE-LEASEBACK FACT SHEET**

**ABOUT US**  
San Diego Unified School District 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 woman-, minority-, disabled veteran-owned, and small business enterprises.

**Capital Improvement bond funds Propositions S, Z, and Measures Y & U, jointly provide about \$11.6 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, Prime and large subs are motivated to engage more EBEs on each project. In fact, bids are being packaged with EBE participation as a fact. EBE participation doesn't just focus on first tier subs, the EBE Program recognizes participation of lower tier subcontractors, materials suppliers, trucking companies, some consultant, and construction site support services.

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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.

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**What Subcontractors Need to Know**  
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**In addition to developing relationships with the Primes, here are some other things that subcontractors and EBEs can do to be prepared to bid:**

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

**LEASE-LEASEBACK PRIME CONTRACTORS**

Balfour Beatty | Blighhart-Resman | CWD/Driver | CLARK  
LEVEL10 | INCARTY | PCL | BOLTEK | SUNDT | SWINERTON | Turner

**LLB Goals**

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

**LET'S DO BUSINESS**

A publication of San Diego Unified School District's Facilities Planning and Construction Department | Volume 32 • Q2 2023

**ABOUT US**  
San Diego Unified School District's Facilities Planning and Construction (FPC) Department is designed to engage with diverse small businesses to increase participation in district construction projects.

San Diego Unified has a robust small business program. We are exceedingly proud to report that to date, nearly \$1.2 billion have been spent with XBEs.

**XBE is a non-specific term encompassing a broad range of diverse business ownership. Formerly "EBE" for Emerging Business Enterprise, XBE is an umbrella term that includes small business and minority, woman, and disabled veteran-owned business enterprises, and similar designations.**

Capital improvement bond funds Propositions S, Z, and Measures Y and U provide \$11.6 billion to design and construct clean, safe, environmentally friendly facilities that encourage successful teaching and learning at schools throughout the district.

**CALLING ALL SUPER HERO CONTRACTORS AND VENDORS!**  
The passage of Measure U means an additional \$3.2 Billion and plenty of opportunities on the horizon with more than 20 LEASE-LEASEBACK construction projects going out for bid in the first six months of 2023. All construction trades, all business sizes, all specialties are needed. Scroll to the next page to learn about each project and how your company can join the heroic team that builds, repairs, and remodels safe school facilities for San Diego's teachers and students!

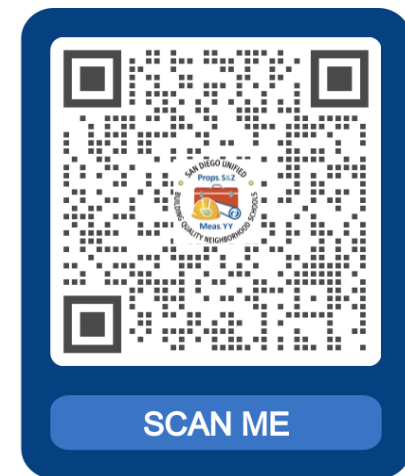
**MEASURE U Approved!**

**DIVERSE BUSINESS PARTICIPATION REPORT\***  
The business outreach team sets annual XBE participation goals that reflect the local market. Participation is tracked and provided to the Independent Citizens Oversight Committee and Board of Education. The table below shows the goals for and participation of XBEs in district projects.

XBE Category	XBE Goal	Overall XBE Participation
Overall XBE Awards	50%	44.03%
Disabled Veteran	5%	5.85%
Minority-Owned	8%	9.75%
Woman-Owned	7%	8.59%
Small Business	40%	37.02%

**DOING BUSINESS WITH SAN DIEGO UNIFIED SCHOOL DISTRICT**

San Diego Unified School District Facilities Planning & Construction





# Business Outreach Contacts

- Karen Linehan  
[klinehan@sandi.net](mailto:klinehan@sandi.net)
- Alma Bañuelos  
[abanuelos@sandi.net](mailto:abanuelos@sandi.net)

## Lease-Leaseback Outreach

- Sidney Hucklebridge-Key  
[shucklebridge@sandi.net](mailto:shucklebridge@sandi.net)