



DE

PUERTO RICO
DEPARTMENT OF EDUCATION

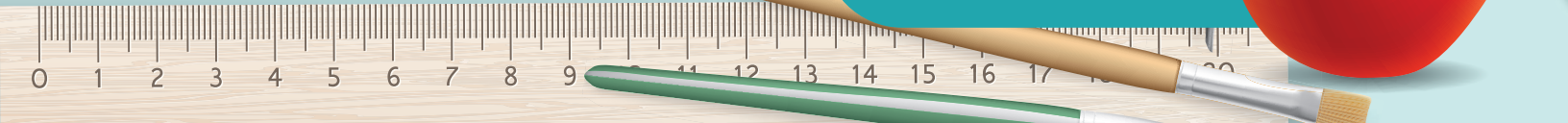


RFP NO: PRDE (ER)-2019-02

Program Management Services

ORIGINAL

April 22, 2019



SUBMITTED TO:

Osvaldo Guzmán
Undersecretary of Administration
Puerto Rico Department of Education
150 Federico Acosta Street 2nd Floor
Undersecretary of Administration's Office
Urbanización Industrial Tres Monjitas
Hato Rey, Puerto Rico

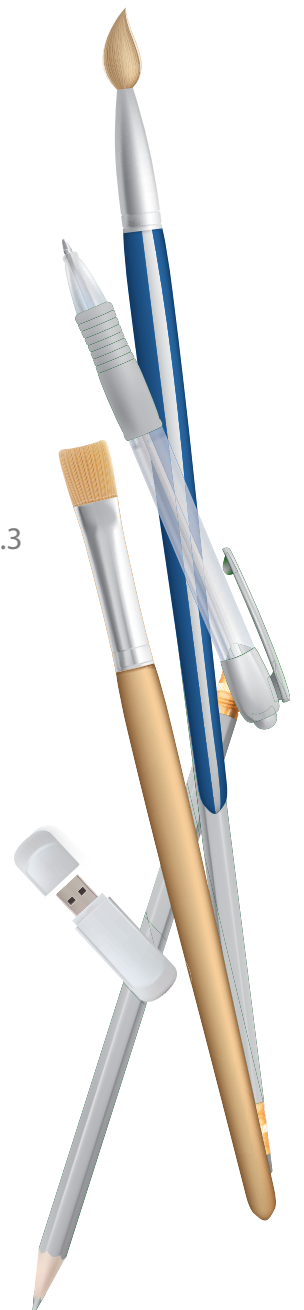
SUBMITTED BY:

CMA,CPM,CSA Joint Ventures
1511 Ponce de León Ave., Suite 23
San Juan, PR 00907
Tel. 787-641-6800



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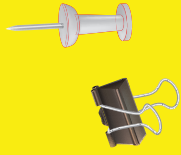
Cover Letter

Tab 1

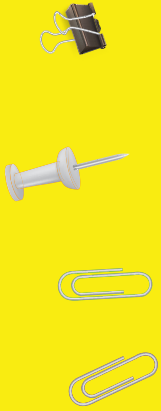








Tab 1



Cover Letter



April 22, 2019

Mr. Osvaldo Guzmán
Undersecretary of Administration
Puerto Rico Department of Education
150 Federico Acosta Street 2nd Floor
Undersecretary of Administration's Office
Urbanización Industrial Tres Monjitas
Hato Rey, Puerto Rico

RE: Request for Proposals (RFP) NO: PRDE (ER)-2019-02
TITLE: Program Management Services

Dear Mr. Guzmán:

The Puerto Rico Department of Education (PRDE) will embark in a historical Capital Investment Program (CIP) to repair / reconstruct all schools that serve the Island's public-school student population, and were also damaged by Hurricanes Irma and Maria in September 2017. The Program Management Office (PMO) sought under this RFP will manage the planning and subsequent execution of this program—consistent with PRDE's new programmatic vision contained in Act 85 of 2018, and in compliance with all applicable federal and state requirements.

The proposal submitted herein for your review and consideration is being presented by a consortium of Puerto Rico's three (3) largest engineering and program management firms: **CMA Architects & Engineers, LLC (CMA)**; **CPM PR, LLC (CPM)**; and **CSA Architects & Engineers, LLP (CSA), Joint Venture (Team C3-JV)**. This consortium joins three entities with over 150 years of combined corporate experience providing the local (national and international) markets with Program Management, Engineering and Design, Construction Management and Federal Fund Management services to both, the Public and Private sectors. The extent of these services, when combined, can address the full-service delivery cycle (from planning to project closeout) required under this program—including managing diverse funding sources. Each of the firms have managed and executed on their own large programs, such as the \$750M PRDE's Schools for the 21st Century Program, the \$500M CIP for the Puerto Rico Aqueduct and Sewer Authority, the \$7B American Recovery and Reinvestment Act for the Government of Puerto Rico, among others. More specifically to Disaster Recovery, one of the Joint Venture firms (CSA) is a key member of the Program Management team leading the \$3B+ design and construction for the first major recipient (that is, the New York City Housing Authority, NYCHA) of Federal Emergency Management Agency (FEMA) Stafford Act Section 428 funding for reconstruction of damages caused in 2012 by Hurricane Sandy.

To further complement the joint venture's capabilities, Team C3-JV has also included Subject Matter Experts (SMEs) in areas such as: education trends and facilities design, grants management and compliance, and others.

Team C3-JV's commitment to this reconstruction program is unparalleled for yet another reason. As local companies, these firms are deeply vested in supporting efforts, particularly in areas such as education, that will promote the social and economic development and future wellbeing of the people of Puerto Rico. This commitment is particularly evidenced by the firms' combined staff that exceeds 500 highly trained professionals whose personal livelihood are also tied to the success of reconstruction efforts such as the





one pursued by this initiative. As detailed in this document, Team C3-JV is not only capable of executing all tasks listed in the referenced RFP's Scope of Work, but performing them to the highest level of quality, in conformance with industry standards, and in alignment with PRDE's vision.

Team C3-JV is enthusiastic with the opportunity to help the PRDE execute this unprecedented program for the people of Puerto Rico. Thank you for your consideration of our qualifications.

Sincerely,

Héctor Javier Rivera
CMA-CPM-CSA Joint Venture





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Proposal Signature Page (Mandatory)

Tab 2







Tab 2



Proposal
Signature Page
(Mandatory)

PROPOSAL SUBMITTAL FORM 1 – PROPOSAL SIGNATURE PAGE

EACH PROPOSER IS REQUIRED TO SUBMIT A PROPOSAL SIGNATURE PAGE WITH ITS PROPOSAL. ANY PROPOSER THAT FAILS TO DELIVER THE PROPOSAL SIGNATURE PAGE IS AUTOMATICALLY DISQUALIFIED FROM CONSIDERATION FOR AN AWARD

PROPOSER: CMA - CPM - CSA Joint Venture

ADDRESS: Corporate Office Park CPM Plaza 44 Road 20, Suite 201 Guaynabo, PR 00966-3326

PHONE: (787) 999-4000


The undersigned, doing business under the full and complete legal name as set forth above, proposes to provide the services described in the Proposer proposal to the Puerto Rico Department of Education, for the prices set forth in the Proposer's Price Proposal. The Proposer makes the following certifications with regard to its service and pricing proposals:

1. Proposer is presenting its proposal for the RFP No. **PRDE (ER)-2019-02**.
2. Proposer certifies that it has filed all its income tax forms and paid all its taxes (including property taxes), unemployment insurance, disability, and chauffeurs social security, in all applicable cases; or, that it has a payment plan for payment of those obligations and is complying with such plan.
3. Proposer certifies that there is no conflict of interest in the contract and provisioning of the proposed services and items to the PRDE.
4. Proposer agrees that its service proposal and price proposal shall remain valid for 180 days from the date of submission.
5. Proposer certifies that none of the employees of the Department or any of its sub-departments or agencies has a pecuniary interest in their offer.
6. Proposer certifies that its proposal has been prepared and developed without collusion with any of the Department's officials or other Proposers and without effort to preclude the Department from obtaining the best competitive proposal.
7. Proposer certifies the Proposer nor any person or entity associated who is partnering with the Proposer has been the subject of any adverse findings that would prevent PRDE from selecting the respondent. Such adverse findings include but are not limited to the following:
 - a. Negative findings from a federal Inspector General or from the US Government
 - b. Accountability Office (GAO), or from an Inspector General in another state;
 - c. Pending or unresolved legal action from the US Attorney General or from an


- d. Attorney General in Puerto Rico or another state;
 - e. Pending litigation with the Government of Puerto Rico, or any other state;
 - f. Arson conviction or pending case;
 - g. Harassment conviction or pending case;
 - h. Puerto Rico, federal, or private mortgage in arrears, default, or foreclosure proceedings;
 - i. In rem foreclosure;
 - j. Sales tax lien or substantial tax arrears;
 - k. Fair Housing violations or current litigation;
 - l. Defaults under any federal or Puerto Rico sponsored program;
 - m. A record of substantial building code violations or litigation against properties owned and/or managed by respondent or by any entity or individual that compromises the respondent;
 - n. Past or pending voluntary or involuntary bankruptcy proceedings; or
8. Conviction for fraud, bribery, or grand larceny or any felony listed in the PR Anticorruption Code of 2017. The undersigned, hereby acknowledges receipt of (a) RFP# PRDE (ER)-2019-02 and including all appendices, (*Proposer should list here any and all addenda to the RFP issued by the Department and posted at www.de.pr.gov*). The undersigned also hereby certifies that the Proposer has read and agrees to abide by the terms and conditions of the RFP including all appendices and addenda.

Signature: 
Name/Title: Héctor J. Rivera Rodríguez/President of CPM

Date: April 12, 2019

Signature: 
Name/Title: Jose A. Rodriguez

Date: April 15, 2019

Signature: 
Name/Title: Jorge A. Tirado, Managing Member.

Date: April 15, 2019.





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DEPARTMENT OF EDUCATION

Service Requirements (Mandatory)

Tab 3





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C I N E Z
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Tab 3



Service Requirements (Mandatory)



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1. Introduction

1.1. Background

The effort to reform the Puerto Rico public education system, while at the same time planning for the repair of the damages caused to most public schools by the two hurricanes—Irma and María—that ravaged the Island in 2017, is at a historic crossroad.

On one hand, the Government of Puerto Rico (GPR)—through its Department of Education (PRDE)—is beginning to restructure this agency as allowed under the recently enacted Act 85 of 2018 (later described), while, on the other hand, the GPR’s Central Office of Recovery, Reconstruction and Resiliency (COR3), with the support of FEMA and other federal agencies, is still assessing damages and developing cost estimates for the repair and reconstruction of all the schools in the system.

The PMO sought by the PRDE under this RFP# PRDE(ER)-2019-02 will support this agency’s Recovery & Resilience Office (OR&R) in the integration and subsequent execution of the Capital Improvement Program (CIP) that results from these two (2) parallel efforts—once they are planned, integrated and confirmed in compliance with both, GPR’s new programmatic vision for the PRDE (under Act 85 of 2018), and all federal requirements under FEMA’s Stafford Act, HUD’s CDBG-DR Program, and other applicable requisites. This PMO will, thus, provide assistance in the complete Project Delivery Cycle of this program including: Planning, Execution and Close out.

PRDE FACILITIES FACT SHEETS

- 270 - Elementary School
- 213 - Elementary / Middle Schools
- 41- Elementary / Middle / High Schools
- 158 - High Schools
- 101 - High Schools
- 51 - Middle / High Schools
- 7 PS - Institute
- 3 PS - Others

San Juan is the Municipality with most schools followed by Ponce.

Culebra is the Municipality with the least amount of schools followed by Rincon.

There are over 4,000 facilities under PRDE’s purview (for an approximate total of 18M sq. ft. of area)



The proposal presented herein is being submitted by a joint venture of the three (3) largest Design, Program and Construction Management, and Federal Fund Consulting Firms in Puerto Rico: CMA Architects & Engineers LLC, CPM PR LLC, and CSA Architects & Engineers, LLP (herein, **Team C3-JV**). As later detailed, these three (3) firms are particularly qualified and well positioned to execute the work specified in this RFP.

Recent PRDE Efforts at Corrective Maintenance and School Upgrades: The PRDE has over the years undertaken several projects to address the school’s deteriorating physical infrastructure. Two of the most significant are:

Back-to-School Program. Every summer over the past several years, and in preparation for the new year’s back-to-school, the PRDE has allocated between \$15 to 30 million for the rapid repair and corrective maintenance of most schools (in activities that are mostly limited to repainting, repairing basic equipment, cleaning common areas, and conditioning all bathrooms). These activities

address defects included in assessments previously made by the two (2) agencies responsible for the schools’ day-to-day maintenance and operation: OMEP (“Oficina para el Mantenimiento de Escuelas





Públicas”) and the Puerto Rico Public Buildings Authority (PBA). The focus of this yearly program, however, has been more reactive than preventive.

Schools for the 21st Century Program. In 2011, the GPR allocated approximately \$700 million in state funds to modernize public schools across the Island. The Puerto Rico Infrastructure Financing Authority (PRIFA), through a Memorandum of Understanding with the PRDE, managed the execution of this initiative.



This program was the last significant Capital Improvement Program (CIP) implemented to address the urgent need to upgrade (to both, current construction codes and modern education standards) some of the PRDE’s school buildings’ inventory.

The program, which was designed to impact at least one (1) school in each of the island’s 78 municipalities, included both, the modernization of existing schools and the new construction of schools. **Fielding Nair International (FNI)**, a global educational design consultant (and, as later described, a **Team C3-JV** consultant in this proposal), developed



and implemented new Design Guidelines unique to the PRDE to maximize the students’ learning experience. It re-envisioned the spaces made available to the students by providing new collaborative areas supported by furniture that promotes collaboration, community centers that welcomed residents from surrounding communities, structural retrofitting to ensure code compliance and life &

safety measures, and maximization of some of our island’s natural resources: light and ventilation, among others considerations.

The School for the 21st Century Program was widely well received, and was selected by KPMG, in its second edition of *Infrastructure 100: World Cities Edition*, as one of the Top 100 Infrastructure Projects of the World. This Program impacted approximately 5% of the schools in the public system.

1.2. A New Programmatic Vision for PRDE

The Governor of Puerto Rico signed on March 29, 2018 the Puerto Rico Education Reform Act (Act 85 of 2018) which defines a new philosophical and sociological context for the transformation of a public educational system that will now be centered around the student.

This transformation not only seeks to address, through a more decentralized structure, years of operational inefficiencies, revenue declines and shifts toward private schools, it also seeks to revise the system’s direction with forward looking learning alternatives intended to strengthen the system’s ability to better educate a student population that will then support and also benefit from Puerto Rico’s economic reconstruction in the future.

As stated by the GPR in the ‘New Fiscal Plan for Puerto Rico of 3/23/18, this reform “...aims to achieve both academic and financial benefits” through program and operational changes¹ that include: (i) “Escuelas Públicas Alianza” (or charter schools operated by ‘Certified Educational Entities’), and, (ii) “Programa de Libre Selección de Escuelas” (or School Choice Program, which allows, among others, public school students to transfer to another public- or private school of their choice), to be managed under a new decentralized, Local Education Agency (LEA) structure comprised of seven (7) “Oficinas Regionales Educativas” (or Regional Educational Offices).

¹ Detailed in Act 85 of 2018





These changes should not only result in substantial operational savings (from the consolidation of functions and departments), but in operational adjustments that improve student-to-teacher ratios and optimize schools' footprints.

From Crisis to Opportunity: In September 2017, Puerto Rico suffered the ravages caused by Hurricanes Irma and Maria. The latter—a Category 5 hurricane regarded as the worst storm to have affected the Caribbean, and the 10th most intense Atlantic hurricane on record—plowed into Puerto Rico from its southeast shore, through the entire Island, and exited the northwest corner hours later. A year-and-a-half later, its devastation is still being assessed.

2. CMA-CPM-CSA JV Experience

All three (3) **Team C3-JV** companies have been, individually, very active in the Island's recovery efforts since the early days following the storm. Many **Team C3-JV** professionals not only witnessed the extent of the damages caused to the Island's infrastructure, many have been involved in various tasks of the initial response and reconstruction efforts (with public and private entities alike) in efforts that support the PRDE's claim in the RFP that: "...it is estimated [that] the cost to restore the PRDE schools and facilities is at least \$10,000,000,000"; a figure that may accurately reflect the amount of resources needed to repair and rebuild—to current code and educational standards—an educational system whose many of its 1,100 school facilities in operation prior to the storm have been plagued for years from severe resource insufficiency and deferred maintenance.

The CMA-CPM-CSA Joint Venture: The task to plan, program and manage the execution of an effort of this magnitude requires companies with the proven experience in program management, the resources in all A/E services, and a deep knowledge about the local education system.

The **Team C3-JV** brings together the proven capabilities of the three (3) largest and most reputable A/E and Program Management firms in Puerto Rico—assisted by a group of highly qualified consultants and 'subject-matter experts' (SMEs)—ready to "hit the ground running" in planning, programming and managing the execution of this PRDE Program. **Team C3-JV:**

ADDED VALUE OF TEAM C3-JV



Experienced and high performing resources with proven track record in the delivery of complex program management of disaster recovery services to help the PRDE meet its critical program goals.



Low risk transition for the PRDE given the terms' previous experience with the agency and its assets.



Effective integration of our Team into one cohesive team to help solve problems and executive projects.



Institutional knowledge by our key team members who have worked on other PRDE programs and bring institutional knowledge of PRDE's processes and tools and understanding all programs expectations and will provide immediate and relevant value to this program eliminating any learning curve.



Effective and timely communication that will maintain open lines of communication, keeping our client and stakeholders up-to-date on key issues with real-time project status and corrective action responses.

- Has a combined corporate track record of over 150 years;
- Has a local work force that exceeds 500 (mostly licensed) professionals—very cognizant of all local building codes as well as federal regulatory requirements);
- Groups three (3) companies that have managed over \$30Bn in combined CIPs. Please refer to Figure 1 for detailed listing of relevant experience.

In addition, all **Team C3-JV** firms have also collaborated in major projects performing different functions (projects such as PRDE's School for the 21st Program, PRASA's CIP Program, and others).

If as separate firms CMA, CPM and CSA have each developed a reputation of quality and integrity in designing and/or managing the execution of large infrastructure or facility projects of all types, together—as later described—this joint venture builds a formidable organization capable of planning, programming and managing the execution of this program to the satisfaction of the PRDE and all federal agencies





involved—and most importantly, of the students and their communities at large.

Individually, each of **Team C3-JV**'s experience and track record can be summarized as follows:



CMA is a multi-discipline full service A/E firm in continuous practice in Puerto Rico since 1959. For 60 years it has succeeded by recruiting some of the best architectural and engineering talent available for its core professional staff. CMA continues to be one of the largest A/E firms on the island. It is a Minority Business Enterprise and a member of the U.S. Green Building Council. It has its own 30,000 sf office building, centrally located on F.D. Roosevelt Avenue. The building can easily accommodate resident staff from clients and/or consultants when it is convenient for the efficient progression of the overall design effort. CMA's staff encompass the fields of architecture, planning, civil, transportation, water resources, environmental, chemical, structural, mechanical, fire protection and electrical engineering, PR and US permitting, as well as project management, construction management, field observations, tree survey, noise studies, asbestos/lead certifications, H/H Studies, inspections, scheduling and opinions of probable cost. This breadth of expertise allows us to offer practically all the technical roles most projects require from inception to completion. The professional staff is fully bi-lingual, many of them with advanced degrees from US and PR universities. CMA is an award-winning firm with a staff that is active in several professional organizations and societies. Its members have authored more than fifty architecture and engineering publications. CMA has been recognized by the Engineering News Record (ENR) publication as a Top 200 International Design Firm.



CPM is a leading technical consulting and project management firm with more than twenty-five years assisting clients to achieve their project objectives. CPM has contributed to Puerto Rico's advancement of infrastructure and economic development, managing transformational programs such as the \$756M Schools for the 21st Century Program. In a joint venture with a US-based firm, CPM was also responsible for managing the procurement and construction efforts for the Puerto Rico Aqueduct and Sewer Authority's (PRASA) North Region CIP, which included work in 19 municipalities. Water projects in the CIP included all segments of the water cycle such as: rehabilitation and construction of raw water facilities, water treatment plants, water storage tanks, distribution pump stations and distribution lines, including the replacement of client's service line and water meters, among others. The project amounted to \$238 million in capital investment. CPM has also been involved in managing large Programs for private industrial and manufacturing companies such as Honeywell, Abbott, Lilly del Caribe among others. Since its inception, CPM has managed and advised over 1,000 infrastructure and construction and capital projects representing a total investment in excess of \$5.6 billion. CPM offers a wide range of technical services that include but are not limited to policy assessment and implementation, project development and planning, feasibility analysis, project screening, engineering and technical assessments, construction and project management services, project business analytics, and technical and procurement advisory for public-private partnerships. CPM has been recognized by the ENR among the Top 100 Professional Service Firm in the United States since 2007.

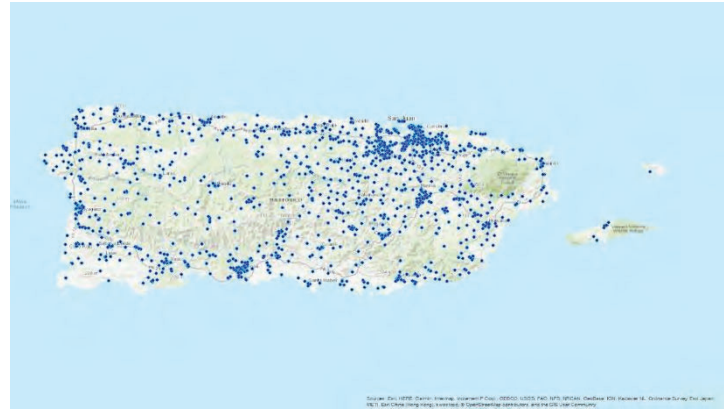


CSA is the largest Hispanic-American multidisciplinary professional service firm of its kind in the United States, providing Program, Project and Construction Management, Architecture and Engineering Sustainable Design and Operations & Maintenance services. CSA serves public and private sector clients throughout several regions in United States, Caribbean, Central and South America. In the past 2 decades, CSA has strengthened its expertise in Program Management focused on federal funded Programs. In 2011 CSA was the firm chosen by AFI to manage the American Recovery and Reinvestment funds (ARRA) allocated to the island in an effort to mitigate the severe economic turndown in the United States.



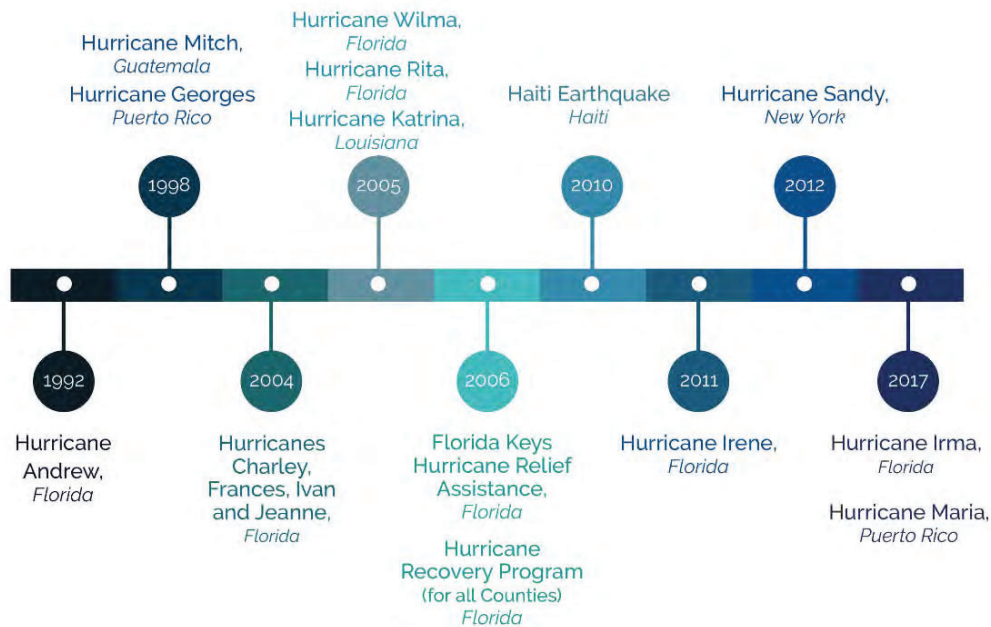


CSA developed and implemented processes to streamline the governmental use of funds. In addition, CSA established guidelines, training, monitoring, reporting and program audits assuring the correct use of federal moneys. This program included all State Agencies and municipalities. Reporting structures were implemented to ensure compliance. In 2014 (to present) CSA was contracted as a major subconsultant for the \$3B NYCHA Recovery and Resilience Department “Sandy Recovery Program “for Program Management Services including overall program management support, design oversight, procurement, construction management, community outreach, and grants management for PMO Funding group support with cost estimating, documentation, reporting and negotiation efforts for the 428 FEMA grant and HUD CDBG-DR funds. Key Services include: Program Management support, Design Oversight (including consulting expertise on environmental review services related to NEPA), Procurement, Construction Management, Community Outreach, and Grants Management for PMO Funding group support with cost estimating, documentation, reporting and negotiation efforts for the 428 FEMA grant and HUD CDBG-DR funds. CSA is ranked #35 in the Top 50 Program Management Firms and #55 in the Top 100 Construction Management-for-Fee Firms in the United States as per the 2017 ENR publication.



Disaster Recovery Experience Timeline

The Graph below shows a timeline of recent natural disasters in whose recovery efforts at least one of the firms in **Team C3-JV** has participated. We are also including a detailed list of relevant experience managing large Programs as well as FEMA 428 grant and CDBG-DR funded programs.





<p>CSA ARCHITECTS & ENGINEERS, LLP</p>	<ul style="list-style-type: none"> • \$3 billion NYCHA Recovery & Resilience Program –428 FEMA grant and HUD CDBG-DR funds • \$1 billion NYC HRO “Build it Back” Hurricane Sandy Affected Community Recovery CM/Design/Build – CDBG-DR Funds • \$800 million FEMA-funded Infrastructure Repair Program, Miami Dade County, FL • \$62 million Hurricane Wilma, Program Management & Inspection, Florida, Broward & Palm Beach Counties • \$7 billion American Recovery and Reinvestment Act (ARRA) projects for the Commonwealth of Puerto Rico (prime) • \$958 million Capital Improvement Program for the Cincinnati Public School system (JV prime) • \$1 billion of outsourced building department services for several South Florida municipal governments (prime) • \$1.8 billion water and wastewater infrastructure projects for Infrastructure Financing Authority (PRIFA) for the Commonwealth of Puerto Rico (prime) • \$100 million Hurricane Ivan, Miami-Dade and Monroe Counties, FL • \$142 million Hurricane Recovery Program FDOT District 4, District-wide, FL • \$5.2 billion expansion of the Philadelphia International Airport (team member – structural engineering design/review) • \$800 million FEMA-funded Infrastructure Repair Program, Miami Dade County, FL • \$62 million Hurricane Wilma, Program Management & Inspection, Florida, Broward & Palm Beach Counties • \$7 billion American Recovery and Reinvestment Act (ARRA) projects for the Commonwealth of Puerto Rico (prime) • \$958 million Capital Improvement Program for the Cincinnati Public School system (JV prime) • \$1 billion of outsourced building department services for several South Florida municipal governments (prime) • \$1.8 billion water and wastewater infrastructure projects for Infrastructure Financing Authority (PRIFA) for the Commonwealth of Puerto Rico (prime) • \$100 million Hurricane Ivan, Miami-Dade and Monroe Counties, FL • \$142 million Hurricane Recovery Program FDOT District 4, District-wide, FL • \$5.2 billion expansion of the Philadelphia International Airport (team member – structural engineering design/review) • \$3 billion NYCHA Recovery & Resilience Program –428 FEMA grant and HUD CDBG-DR funds • \$1 billion NYC HRO “Build it Back” Hurricane Sandy Affected Community Recovery CM/Design/Build – CDBG-DR Funds
<p>CPM PR, LLC</p>	<ul style="list-style-type: none"> • \$756 million 21st Century Schools Modernization Program for PRIFA • \$13 million King’s College New Educational Facility for King’s Group, Panama • \$80 million Student Life Residential Project at the University of Puerto Rico, Mayagüez Campus for the PRPPPA • \$168.4 million 2010 Central American & Caribbean Games Sports Facilities for PRIFA • \$238 million Major Water Capital Improvement Program, Puerto Rico North Region for PRASA • \$278.7 million Transportation Infrastructure Program Management for the PRHTA • \$22 million Water Filtration Plants Automation & Rehabilitation Programs for PRASA • \$27.3 million Honeywell Building at Las Americas Technology Park for PRIDCO
<p>CMA ARCHITECTS & ENGINEERS, LLC</p>	<ul style="list-style-type: none"> • \$8 million Las Americas Industrial Park – PRIDCO, Moca, PR • \$10.6 million Guánica Wastewater Treatment Plant Expansion, Guánica, PR • \$10.8 million Improvement to the Water Supply System, Patillas, PR • \$10.5 million Sanitary Sewer System for Ensenada Community, Guánica, PR • \$84 million Port of the Americas, Ponce, PR • \$42.9 million MRO Facility in Rafael Hernandez Airport, Aguadilla, PR

Figure 1: Relevant Experience





3. PMO Structure

Each of the **Team C3-JV** firms has significant individual experience and capacity to handle many of the tasks under this program; these individual set of experiences and capacities include many overlapping core competences that mirror the expected scope of work of this program—something that will not only facilitate the integration of needed resources to manage all individual projects for the benefit of the PRDE but, most importantly, will assure the successful execution of the overall program.

In addition to their individual experiences and core competences, all **Team C3-JV** firms—as local companies—have also a shared sense of commitment to the success of initiatives like these for their importance in advancing the Island’s future socio-economic development.

3.1. Organizational Chart (Key Staff)

To assure a seamless integration of resources from all three firms, however, each firm will have a leading role in key, but related, functions:

As summarized in the Key Staff Organizational Chart depicted on Figure 2 (with a more detailed version of the Organizational Chart later described and presented in Section 5.2, the PMO’s Program Manager (PM) will be led by Jose Javier Perez, a CPM engineer with much experience in Program Management, including public school reconstruction in Puerto Rico through the Schools for the 21st Century Program. Desireé Seilhamer, Deputy Program Manager, is a CSA Architect with significant PM experience in Puerto Rico as well as in NYC through the Built it Back Recovery Program in the aftermath of Hurricane Sandy. At a staff level, we have included administrative, technology, Procurement, Community Outreach, Grant Management and Compliance efforts with professionals with significant experience in managing federal grants and managing and assuring compliance of Section 428 FEMA grants and HUD CDBG-DR funded programs. At the operational level, the execution of the program will be led by Jose Torres, a CMA Engineer with a long history managing construction projects including managing the Pre-Construction activities for the PRASA CIP.

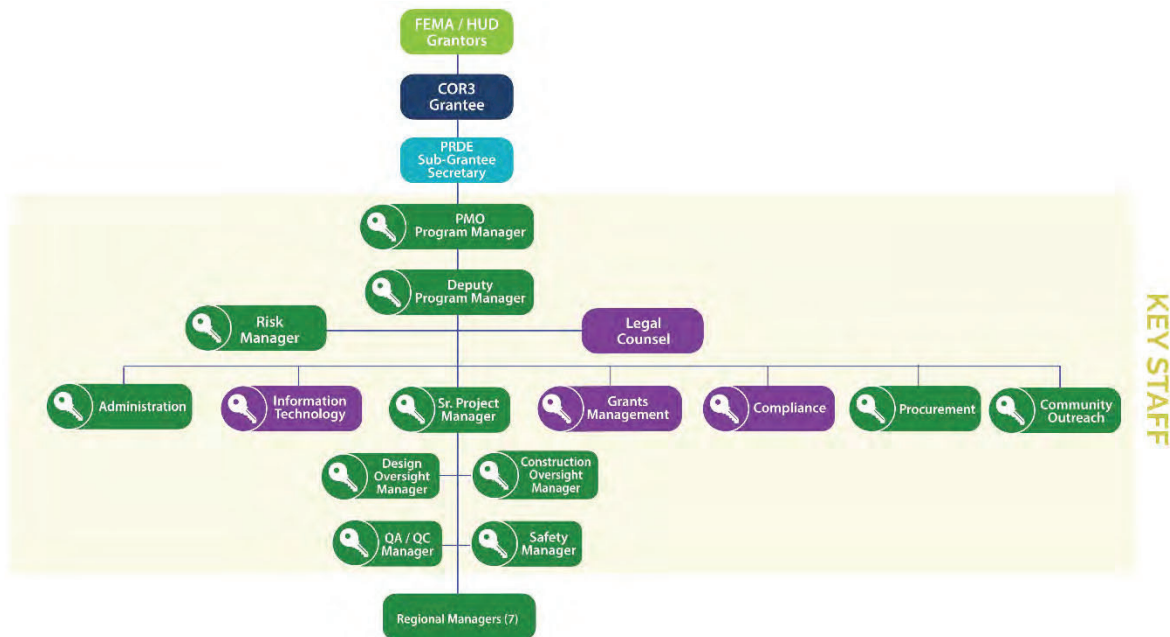


Figure 2: Organizational Chart Summary – PMO’s Key Staff





3.2. Key Staff Experience

Following is a highlight of the experience of all members of **Team C3-JV** Key Staff:

KEY PERSONNEL		
JOSE JAVIER PEREZ Program Manager	21 YRS EXPERIENCE Lic: PE	Professional electrical engineer with Experience in the construction industry for both the private and public sectors. He has been responsible for project and construction management, program management of capital projects, inspection and coordination of construction activities, and supervision of field personnel. He has been accountable as well for start-up coordination and project close-out. He has specific relevant experience in program management for public schools in Puerto Rico, experienced acquired through the Schools for the 21st Century Program.
DESIREE L. SEILHAMER Deputy Program Manager	15 YRS EXPERIENCE	Experience in project and program management with a particular focus on architecture design and urban planning. Her career includes projects focused on management of federal funded programs, as well as emblematic Design Build projects in Puerto Rico. More recently, Ms. Seilhamer managed CSA's design engagement with the NYC DDC Build it Back program where the City launched a CDBG-DR funded program to help over 60k single family homes recovered from the Hurricane Sandy devastation. She also lead CSA's Design Management efforts for the 21st Century School Program. She is currently working as the VP for Corporate Business Development.
JOSE TORRES RODRIGUEZ Senior Project Manager	29+YRS EXPERIENCE Lic: PE	Experienced chemical/environmental engineer in the environmental field. He has been responsible for the design of water and wastewater treatment facilities for the Puerto Rico Aqueduct and Sewer Authority (PRASA) as well as for industrial clients. Also, he served as Pre-construction Manager for the PRASA Capital Improvements Program at the South, East and West Regions. He is very knowledgeable of PRASA and its operational system due to previous work experience there before joining CMA.
ARIEL VERA-BEVERAGGI Design Oversight Manager	20+YRS EXPERIENCE Lic: AIA	Versatile architect with experience designing and managing a broad range of project types and teams. He managed to update firm delivery methods to remain relevant in an industry transformed by technology and contracted by a slowdown in the local economy. He used technology to provide quality services efficiently. He has managed multiple large, complex projects from Pre-design through Construction Administration. He communicates project goals, establishes roles and responsibilities of key team members, and quality control programs. He is experienced in a variety of project delivery methodologies, setting up project execution plans, project schedules, and leading value engineering efforts. He has provided creative design solutions for residential, hospitality, healthcare, life science, commercial and technology advanced projects including multi-family developments and high-end branded residences.
YAMIL CASTILLO Construction Oversight Manager	40+YRS EXPERIENCE Lic: PE	Experience in Project and Construction Management, Architectural Design and Construction Supervision of Institutional, Industrial, Pharmaceutical, Hospitality, Residential, Commercial, and Government Projects. His expertise includes technical and financial evaluation of real estate projects and the production of construction drawings and contract documents. Mr. Castillo has assisted clients in the development of program needs, requirements and the analysis of construction claims and their impact on costs and schedule.
JAY J. LITMAN Educational Design (Fielding Nair International)	40+YRS EXPERIENCE Lic: AIA	Has a deep understanding and appreciation of the educational challenges facing today's children and adults within the traditional "20th Century" learning environments that dominate the vast majority of the world's schools. His experience has focused primarily on the planning and design of educational facilities for children; university facilities; public libraries; urban and campus planning; and the rehabilitation of historic structures. His project background also extends to urban and campus planning. He is deeply involved in the emerging theories of project-based, collaborative learning that is reshaping the international language of school design. These emerging theories mandate fundamental changes in the design of the classroom environment such as; learning in smaller groups, working collaboratively on project-based assignments, creating learning spaces that support multiple modes of learning which, with the confluence of new pedagogies, fundamentally changes teaching and learning in the 21st century.
BRAULIO MEJIA Risk Manager	40+YRS EXPERIENCE Lic: PE	Experience in the engineering services industry, including management, operations, manufacturing, health and safety, construction, validation, and procurement. His work history includes roles, such as, Operations Vice President and Program Manager for an Engineering Firm, General Manager, Engineering Director, Compliance Manager and Plant Engineer, for Pharmaceutical Bulk and Finishing Manufacturing Plants. Mr. Mejia currently manages CSA's Corporate Risk Management efforts.
LUIS MERLE QA / AC Manager	25+YRS EXPERIENCE Lic: PE	Mechanical Engineering Department Director & Principal of the firm since 2002, holds a Bachelor of Science in Mechanical Engineering from University of Puerto Rico, Mayagüez Campus where he graduated Magna Cum Laude and was among the top three engineers from the mechanical department at that date. He received the Top Ten Engineering Award from Merck Sharp and Dohme. Leadership experience in the engineering field. His experience has been primarily in design and project management roles industrial projects. He also has extensive experience performing utilities master planning for energy plant utilities such as chilled water, reheat, steam, compressed air, and vacuum systems in renovations and new construction projects. He is an active member of the International Code Council and it is charge of code reviews and regulatory standard reviews in the firm. His experience, design knowledge, project understanding and know-how on local Codes and regulations brings valuable expertise to the firm. For the last twelve years he has focused in serving the firm as a client liaison, project manager for interdisciplinary projects, code reviewer and quality control manager for projects.





KEY PERSONNEL

<p>JOSE A. JORGE-PAGAN Information Technology Manager</p>	<p>21 YRS <u>EXPERIENCE</u> Lic: PhD</p>	<p>Progressive experience and a holistic approach on IT Operations, Security, Administration, Support, Solutions Design, Networking, IT Education, Project Management Practice & Education.</p>
<p>RICHARD KEENE Grant Manager</p>	<p>25+YRS <u>EXPERIENCE</u></p>	<p>Nationally recognized expert in disaster, emergency and crisis management with experience in planning and preparedness, mitigation, long-term recovery operations, and response and recovery with some of the nation's worst and most deadly disasters. He has been sought out to be deployed to more than 50 presidentially-declared disasters having provided subject-matter expertise to support Federal Emergency Management Agency (FEMA) with the likes of Hurricane Katrina and the 9/11 attack. Mr. Keene brings the highly-coveted blend of disaster management and a specialty in large-scale insurance adjustments of catastrophic disaster events with expert knowledge of risk management and underwriting having provided consulting services for the industry's largest brokers and insurers including Lloyds of London, Chubb Group of Insurance Companies, and AON, among others.</p>
<p>KERY BOLAND Compliance</p>	<p>22 YRS <u>EXPERIENCE</u></p>	<p>Accomplished project and financial manager with experience supporting FEMA Public Assistance IDIQ contracts. In her role as Deputy Project Director/Chief of Finance and Accounting for AECOM Recovery, she managed the entity's entire financial system, valued at more than \$1.2B. Ms. Boland has considerable knowledge of program management practices for responses to natural disasters, and has provided financial control of almost a thousand individual task orders for complex recovery efforts including the "Florida Four" hurricanes, Hurricanes Katrina, Rita, Ike, Gustav, Sandy, Harvey, Irma and Maria.</p>
<p>BRANDALIZ RODRIGUEZ ROSS Procurement</p>	<p>21 YRS <u>EXPERIENCE</u> Lic: AIA</p>	<p>Experienced, results-oriented purchasing professional with experience in the coordination of activities related to procuring goods and services, raw material, packaging and spare parts. She has been accountable for risk management regarding supply contracts and agreements, cost control, and building a culture of long-term saving on procurement costs. Responsible as well to anticipate unfavorable events through analysis of data and developing control strategies.</p>
<p>RAQUEL CAMACHO Community Outreach</p>	<p>19+YRS <u>EXPERIENCE</u></p>	<p>Experience managing projects for public and private clients providing project management, community outreach, permitting and cultural resources management services. Her experience includes project management, community outreach planning, management and operations, pre-construction, construction and operations permitting, environmental planning, natural resources assessments and management plans, environmental impact analysis, cumulative impacts analysis and environmental compliance. Lead the Community Outreach team for the \$3B NYCHA Recovery and Resilience Department "Sandy Recovery Program". She also has extensive experience in estimating and assessing the effects of man on the environment and evaluating project impacts on human (social) and cultural resources.</p>





3.3. Training Checklist

Following is a list of all related FEMA and/or HUD trainings taken (mostly) by members of the Key Staff:

FEMA TRAININGS	
IS-634	INTRODUCTION TO FEMA'S PUBLIC ASSISTANCE PROGRAM
IS-27	ORIENTATION TO FEMA LOGISTICS
IS-100	INTRO TO THE INCIDENT COMMAND SYSTEM / ICS
IS-200	INCIDENT COMAND CENTERS FOR SINGLE RESOURCES
IS-700	AN INTRO TO NATIONAL INCIDENT MANAGEMENT SYSTEM
IS-800	NATIONAL RESPONSE FRAMEWORK
IS-253	OVERVIEW OF FEMA'S ENVIRONMENTAL AND HISCTORIC PRESERVATION
IS-321	HURRICANE MITIGATION
IS-322	FLOOD MITIGATION
IS-323	INTRO TO HAZARD MITIGATION

FEMA TRAININGS & HUD TRAINING	
8 HRS	UNIFORM GUIDANCE OVERVIEW (HUD)
8 HRS	SINGLE AUDIT UNIFORM GUIDANCE CHANGES
8 HRS	SINGLE AUDIT, SUPER CIRCULAR, GOVERNMENTAL ACCOUNTING AND FINANCIAL REPORTING
9.5 HRS	AUDIT PECULIARITIES FOR NON PROFIT ENTITIES AND HUD AUDITS
3 HRS	SINGLE AUDIT PRIMER
7.5 HRS	GOVERNMENT LEARNING PROGRAM 2017
7 HRS	XIV GOVERNMENTAL ACCOUNTING AND AUDITING ANNUAL FORUM
6 HRS	XIV GOVERNMENTAL ACCOUNTING AND AUDITING ANNUAL FORUM
4 HRS	SINGLE AUDIT OVERVIEW SEMINAR
2 HRS	YELLOW BOOK (SINGLE AUDIT): WHAT CAN GO WRONG?

FEMA TRAININGS	
IS-200	ICS FOR SINGLE RESOURCES AND INITIAL ACTION INCIDENTS
IS-300	INTERMEDIATE INCIDENT COMMAND SYSTEM FOR EXPANDING INCIDENTS
IS-393	INTRODUCTION TO HAZARD MITIGATION
IS-546	CONTINUITY OF OPERATIONS (COOP) AWARENESS COURSE
IS-630	INTRODUCTION TO THE PUBLIC ASSISTANCE PROCESS
IS-631	PUBLIC ASSISTANCE OPERATIONS
IS-632	INTRODUCTION TO DEBRIS OPERATIONS IN FEMA'S PUBLIC ASSISTANCE PROGRAM
IS-633	DEBRIS MANAGEMENT PLAN DEVELOPMENT
IS-634	INTRODUCTION TO FEMA'S PUBLIC ASSISTANCE PROGRAM
IS-700	NATIONAL INCIDENT MANAGEMENT SYSTEM / NIMS

TRAINING DEVELOPMENT	
ADDITIONAL FEMA TRAININGS	<ul style="list-style-type: none"> • PA OPS I • PA OPS II • MITIGATION • INSURANCE • FLOOD PLAIN MANAGEMENT • ENVIRONMENTAL AND HISTORIC PRESERVATION -EHP • COST ESTIMATING FORMAT-CEF • GRANTS MANAGEMENT • PRELIMINARY DAMAGE ASSESSMENTS - PDA • TRAIN THE TRAINER - PA OPS • TRAIN THE TRAINER - INSURANCE • TRAIN THE TRAINER - CEF • INCIDENT COMMAND SYSTEM - ICS 100-800
COMPUTER BASED TRAINING	ALTERNATIVE PROCEDURES FOR THE SANDY RECOVERY IMPROVEMENT ACT -SECTION 428 FEMA PUBLIC ASSISTANCE PROGRAM FIELD OPERATIONS POCKET GUIDE
INSURANCE TRAINING	POLICIES AND PROCEDURES FOR INSURANCE / SOP FOR INSURANCE
TECHNICAL ASSISTANCE CONTRACO	<ul style="list-style-type: none"> • BENEFIT-COST ANALYSIS • DEMOLITION -RIGHT OF ENTRY • DONATED SERVICES • INITIAL RESPONSE COSTS • PRELIMINARY DAMAGE ASSESSMENTS • DIRECT AND INDIRECT COSTS (DAC AND CAT Z PW) • CEF OVERVIEW • EHP BRIEFING • INSURANCE BRIEFING • CODES & STANDARDS • IMPROVED & ALTERNATE PROJECTS • MUTUAL AID AGREEMENTS

3.4. Subcontractors & Technical Advisory Team

An important component of **Team C3-JV's** proposed organization is the presence and participation of several 'Subject Matter Experts' (SMEs). These SMEs will support the PMO and will reinforce the team's offering in areas related to programmatic planning, grant compliance, student demographics, cost and budget projections, and community outreach.

These SME's capacities (and responsibilities in the PMO) are summarized in the following table (and further described in their writeups further below):





SME PROGRAM AREA	SUB-CONTRACTOR	RESPONSIBILITIES
SME: EDUCATIONAL DESIGN	• Fielding Nair International	School Design Support / School Rightsizing / Design Guidelines /MFP Support
INFORMATION TECHNOLOGY	• Acumenian	PMIS / Document/ Reporting Control Center / Technical Support
GRANT MANAGEMENT & COMPLIANCE	• Kinne Associates	Process Management / Compliance / Grant Management
SOCIAL & ECONOMIC DATA & PROJECTIONS	• Estudios Técnicos Inc.	Community Outreach / Demographics
COMPLIANCE AUDITS	• Kevane Grant Thornton LLP	Programmatic Audit
LEGAL	• Pietrantoni Mendez & Alvarez LLC	Contracts / Regulatory Compliance



Fielding Nair International (FNI) is an award-winning, global leader in education planning and architectural design. FNI builds and renovates school facilities for today and tomorrow with one primary goal in mind — to improve learning. We help our school client’s vision and build innovative Learning Communities, Maker Spaces and iLabs that support student-directed learning. FNI experience include over \$10 Billion Worth of School Work over the last 15 years. FNI has an outstanding resume of achievements having been recognized multiples times. FNI has won 11 international planning and design awards for excellence. Their awards recognize not just quality architecture, but vastly improved educational outcomes as well. FNI has become a global leader in the Subject Matter having consulted as architects and/or conducted planning workshops or delivered keynote addresses in 47 countries on 6 continents. FNI has the strongest research focus of any school architect in the United States working on the development of their groundbreaking school assessment tool EFEI (Educational Facilities Effectiveness Instrument).



acumenian
advisory, analytics & technology

Acumenian is a technology driven advisory firm, with headquarters in Puerto Rico, that provides services with the help of resources from across the Americas. Since its inception, Acumenian has been working closely with their clients to build organizational and technological state-of-the-art solutions that meet their business needs, while adding value to public and private organizations at every step. Some of their services include process optimizations, organizational project management, technology implementation, IT as a Service, data analytics, IT Integration (Web & Mobile) to maximize user experience, among others. Acumenian is able to optimize performance levels by aligning stakeholders with a full understanding of their structure, processes, objectives, goals and the required data to make the right decisions at the right time.



Kinne Associates (KA) staff individuals led the recovery efforts for FEMA and the State of Louisiana of the Louisiana Recovery School District (RSD) and the Orleans Parish School Board (OPSB) in the aftermath of hurricane Katrina. Hurricane Katrina wiped out all infrastructure and schools in the New Orleans Parish and its outlying areas. 127 school campuses were severely damaged affecting the education of over 60,000 K-12 students.

Federal funding was the primary source and often the only source of financing for rebuilding of the schools systems. KA staff worked with RSD and the OPSB to secure funding for a School Facilities Master Plan, an ambitious multi-year school construction plan. The most significant accomplishment was working with Senator Mary Landrieu to pass special legislation and reach an unprecedented settlement with FEMA, resulting in \$1.8 billion to fund a more comprehensive construction plan. Under this settlement, it was agreed that schools would be rebuilt in a way that best served the city’s population, and not simply returned to their pre-disaster condition.





Estudios Técnicos, Inc. (ETI) is Puerto Rico's leading economic, market strategies and planning consulting firm, with over 30 years of experience and a staff of 25 professionals, in addition to a team of 60 field workers and supervisors, as well as associates in specialized areas. ETI has provided support to municipalities, state agencies, and NPOs in the design, development and implementation of programs funded with local and federal funds. It is the only local provider with experience in the most recent Disaster Recovery CDBG Fund allocations to Puerto Rico.



Pietrantonni Mendez & Alvarez LLC (PMA) was founded in 1992 to render top quality, timely, cost-effective and personalized legal services. The Firm's attorneys pride themselves in taking the time to understand their clients' business goals and provide practical legal solutions to complex legal issues. PMA represents a wide cross-section of businesses, corporations, public entities, individuals and foundations engaged in areas such as financial services, telecommunications, insurance, oil and petrochemical products, retail and wholesale trade, construction, education, government and manufacturing. We take pride in assisting our clients meet the challenges of Puerto Rico's unique legal environment. The Firm also enjoys a close working relationship with many leading US and international law firms.



The Grant Thornton Team, brings the best expertise from the public and private sectors in handling crisis situations. We are experienced in working with governmental entities in various strategic and disaster recovery initiatives, as well in advising on mission critical crises in the private sector. The following table illustrates the Grant Thornton Team's value across relevant criteria. For PRDE, we bring an unmatched combination of resources with deep expertise in: a) federal, state, and local disaster relief program support b) technical knowledge of the Community Development Block Grant Funding Disaster Relief ("CBDG-DR") program and FEMA Public Assistance, Individual Assistance and Hazard Mitigation Grant Program, and c) financial reporting and monitoring, and fraud/corruption compliance and investigative capabilities.

4. Hit the Ground Running

The transformation of Puerto Rico's public school system is as ambitious and far-seeking as it is broad and complex in its implementation. There are many related tasks that must first be defined, then planned, then presented to all stakeholders for consideration and confirmation (and, perhaps, modification), before being programmed and executed—whose effective process must be managed by an entity—a PMO—that is well versed in the structure, operation, regulations and culture of the PRDE, its teachers, and its students (and parents). The PRDE will benefit from an entity that has previously worked with the agency, that is familiar with its structure and operational intricacies, and that can provide services around the entire Project Delivery Cycle without compromising time, quality or cost.

Team C3-JV is uniquely positioned to provide the PRDE with a unique set of combined skills to "hit the ground running" in a new PMO: an operating knowledge of the agency (as two of the three firms in the team were intimately involved in the PRDE's 21st Century School Program's planning—including working with the school concept designer, Fielding Nair International, and its subsequent execution), combined with significant experience in procurement processes, permitting and environmental diligence, design and design management, construction management, and federal fund management; all the skills need to allow for a streamline and successful execution of the Program. **Team C3-JV** does not require a learning curve... it will execute from day one.

We Understand the Market. We have been building Puerto Rico for decades. Our Team comprehends and processes the tools to implement the PRDE's visions. Our proposed organization touches and addresses every single need stated on the RFP. Moreover, we have created think tanks to brainstorm and investigate the New Revolution in Education Design. These global movements seek to improve the education by providing suitable spaces and help our client communities with the difficult challenge of change management. Our three local firms with the support of FNI, Estudios Técnicos and other consultants





will include Puerto Rico among countries such as the United States, Spain and Canada (among others) where they have begun to implement these concepts.

Furthermore, we stand ready to mobilize our team to execute. **Team C3-JV** staff is ready to hit the ground running. Table 1 shows the anticipated staffing level. In addition, our Team has identified an abundance of qualified and experienced personnel that is committed and ready to be deployed upon notice to proceed.

		CMA	CPM	CSA	SUBS
PROGRAM MANAGEMENT	MANAGERS	6	9	16	-
	POLICY	-	-	2	22
GRANT MANAGEMENT & COMPLIANCE	SMEs	-	-	-	10
	ELIGIBILITY	-	-	-	13
	COST ESTIMATING	-	-	8	16
	COMPLIANCE	-	-	6	24
SUPPORT SERVICES	SCHEDULING	3	3	-	-
	COST ESTIMATING	12	5	9	-
	PROJECT CONTROLS	6	10	6	24
	LEGAL	-	3	2	54
	FINANCIAL & ACCOUNTING	25	10	4	-
	INFORMATION TECHNOLOGIES	3	15	5	33
ENGINEERING	STRUCTURAL	7	12	19	-
	MEP	8	2	14	-
	CIVIL	15	22	24	-
ARCHITECTURE	ARCHITECTURE	7	13	11	-
	LANDSCAPE ARCHITECTURE	2	1	2	-
CONSTRUCTION ADMINISTRATION	CONSTRUCTION MANAGERS	28	17	14	-
	CONSTRUCTION INSPECTORS	23	21	14	-

5. Implementation Plan Proposed

Table 1: Anticipated Staffing Level

5.1. Services Required

The Puerto Rico Department of Education (PRDE) is the State agency responsible for managing the PR educational system, curricula and state-operated schools. The PRDE is the recipient of a capped grant and emergency works grants from FEMA to recuperate from the significant damages caused by Hurricanes Irma and Maria. The estimated cost to restore the PRDE's schools and facilities is at least 10 billion dollars (\$10,000,000,000). As described in RFP No.: PRDE (ER) – 2019-02, the PRDE seeks the assistance of a highly qualified consulting firm to administer the grants and the projects that will be implemented, based on the FEMA's approved scopes of work for each affected school within its system. The PRDE estimates that approximately 856 schools, out of a maximum amount of 1,110 schools, will be included in this recovery program. These facilities are located throughout the 78 municipalities on the Island of Puerto Rico, Vieques and Culebra. As required by the RFP, this program will be executed following the PRDE's SEA/LEA structure², which divides the island into seven LEAs, as illustrated in Figure 3 (PRDE Regions/LEAs).

² SEA = State Education Agency, LEA = Local Education Agency





EDUCATIONAL REGIONS

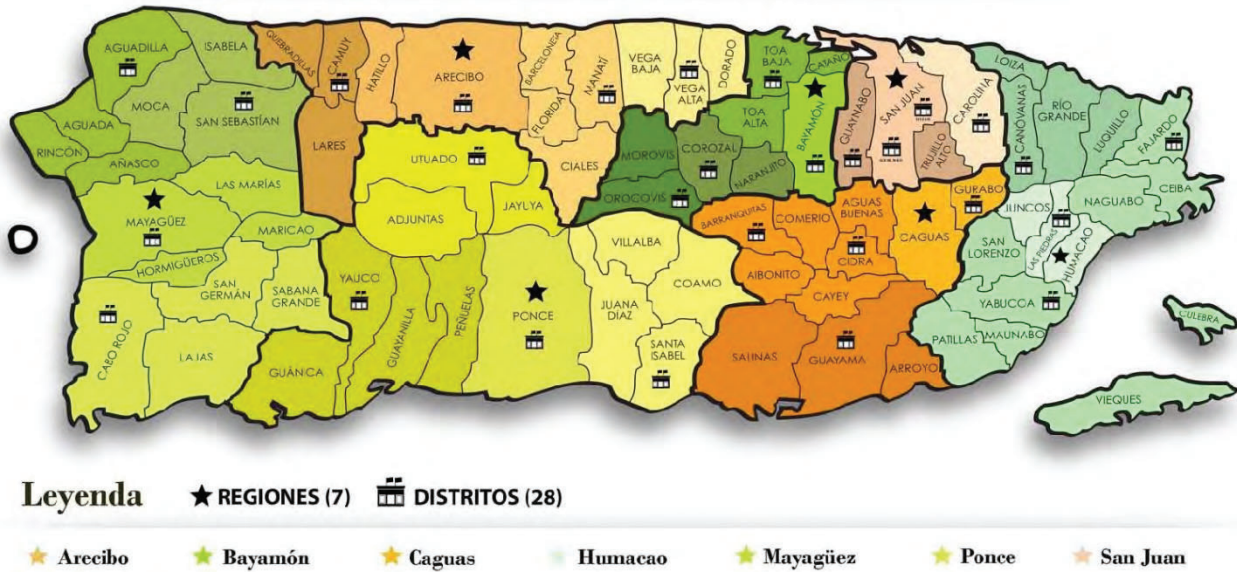


Figure 3: Puerto Rico Department of Education Local Education Agencies (LEAs or Regions).

The PRDE requires program management services, including:

- Project Management
- Grant Management
- Development and Implementation of Administrative and Technical Controls
- Coordination with All Stakeholders
- Damage Assessments
- Condition Assessments (physical and educational)
- Data Processing
- Investment and Operational Cost Estimating
- FEMA and HUD
 - Grant Applications
 - Grants Management
 - Reimbursements
- Procurement and Management of All Necessary Professional Services including all construction and restoration services
- Closeout of All Contracts and Grants

The PRDE envisions these services as being provided by a Program Management Office which will complement its staff assigned to the PRDE’s Infrastructure and Recovery Office, which reports directly to the Puerto Rico Secretary of Education. The PMO will lead the PRDE’s designated Core Team³.

³ The Core Team is a cross functional team. Its members, which include representatives from FEMA, HUD, COR3, PRDE and the PMO, are responsible for the projects achieving their goals and they are responsible to ensure that the program and its components comply with State, Federal, standards and regulations and recognized industry’s best practices.





The PMO will assist the PRDE throughout all phases of the project, including, but not limited to preliminary assessments, development of budget and financial controls, project launch, design and preconstruction, construction and occupancy, and project closeout. As required, the Program Manager’s office will be located within the PRDE’s offices.

Implementation Plan Proposed; Conceptual Framework. Following is the **C3-JV** team’s proposed plan to create and operate the PRDE’s Recovery and Resilience Program Management Office (PMO) . The **C3-JV** has established its proposed PMO organization, work plan and best practices under the conceptual frameworks promulgated by the Project Management Institute (PMI) and the National Grant Managers Association (NGMA). The PMI’s framework provides the PMO team with a set of common parameters, methods, strategies and tools to plan, execute, measure and report on the progress of all the projects included within the PMO’s scope of work. The NGMA has established and promotes best practices regarding the management of the federal grants’ lifecycle. The integration of these approaches is summarized in Figure 44. Operating within a managerial environment where all actions are geared towards achieving measurable goals attached to individual projects will allow the PMO to document its efforts with the required detail to maximize the amount of expenditures eligible for reimbursements from FEMA/HUD/Other Sources.

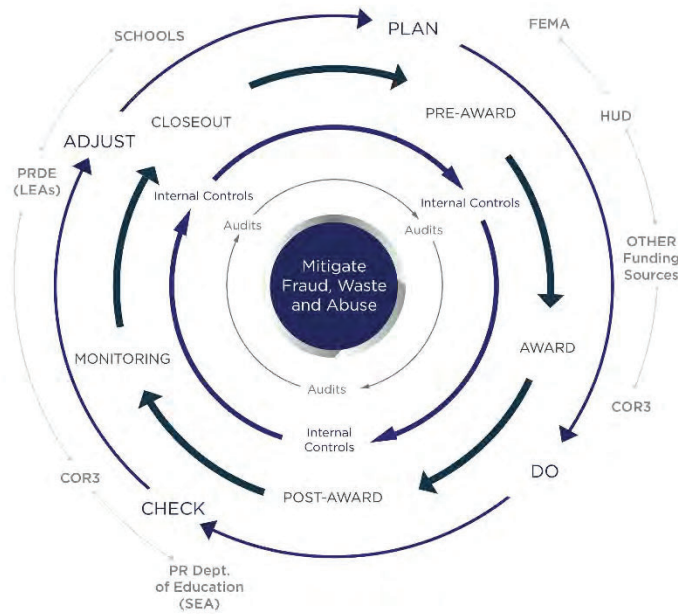


Figure 4: Integration of the Project Management and Grant Management Cycles.

Organizational Chart and Resources. The organizational chart presented in Tab 16 (PRDE’s Recovery and Resiliency Program Management Office Proposed Organizational Chart) presents an organizational structure created to promote and support a projectized work environment. This organization is led by a Program Manager who is responsible for gathering the Client’s requirements, needs and expectations and transmitting them to the PMO Lead Team, who in turn will act within their areas of responsibility to perform the duties required to achieve the PMO’s goals.

5.2. Tiering of Resources

We have classified the PMO resources in three groups (Tier 1, 2 & 3) to simplify the description of the PMO operation.





1. **Tier 1 Resources** - The PMO’s Lead Team constitutes the Tier 1 group. Initially, the main responsibility of these resources will be to assist the PRDE in the creation of the Master Facilities Plan (MFP). These resources are also responsible for operating the PMO. In general, these resources occupy positions which communicate directly with the PRDE’s Lead Team (Client) and with the Core Team members. Tier 1 resources are authorized to create, recommend, implement and submit recommendations for approval to the PMO’s operating processes, based on the Client’s needs, or as a result of operating under the Plan-Do-Check-Adjust framework. These resources, except for the Program Manager⁴, will operate from the main office of the PMO. The roles and main responsibilities of the PMO’s Lead Team (Tier 1 resources) follow:

Program Manager – Main representative of the Program Management Office before the PRDE and other Core Team members. Gathers the expectations of the Client and other Core Team members. Reports progress at the Core Team level and above regarding the PMO’s progress. Reports to the PR Secretary of Education.

Deputy Program Manager: Operationalizes the guidance and instructions received from the Program Manager. In the absence of the Program Manager, acts as Program Manager as might be required. Reports to the Program Manager.

Senior Project Manager – Leads the operational PMO efforts at the regional level. .

Legal Counsel – Provides legal guidance to the PMO resources to assist the PRDE in complying with its responsibility of conducting its actions within the applicable legal requirements.

Risk Manager - Identifies, manages and establishes strategies to avoid, minimize or mitigate risks at the program level.

Information Technology Manager - Identifies the technology needs of the PMO’s personnel and provides appropriate hardware and software solutions. Manages the PMO’s PMIS tool (PROCORE).

Grant Manager – Identifies, manages and operationalizes the appropriate processes and tools to acquire and utilize the federal grants that will be invested in this program..

Compliance Manager – Identifies, manages and operationalizes the appropriate processes and tools to promote the timely and correct use of the federal funds managed by the PMO. .

Procurement Manager – Identifies, manages and operationalizes the appropriate processes and tools to ensure that the procurement needs of all the projects within the Program’s portfolio are completed correctly and in a timely manner..

Community Outreach Manager- The purpose of the Community Outreach Team is to avoid, minimize or mitigate potential delays in the Program’s work schedule due to issues caused by lack of efficient and or timely communication with the Program’s stakeholders. The COT Manager is responsible of identifying the Program’s stakeholders (i.e. federal agencies representatives, local agencies representatives, elected officials, PRDE personnel, educational communities leaders, PRDE parents and students, program contractors and vendors) and their information needs; supports the PRDE in the conception and delivery of the appropriate messages to each type of stakeholder; creates the necessary informational tools to satisfy the information needs of the PMO’s stakeholders.

2. **Tier 2 Resources** – The Tier 2 includes the employees assigned to the work groups led by each PMO’s Lead Team Member. These resources will perform the day-to day tasks required to support the efforts

⁴ The RFP requires that the Program Manager’s office be located inside the PRDE’s offices.





of the Tier 3 Team Members. These employees, except for the Regional Managers⁵, will be located within the main offices of the PMO.

- 3. **Tier 3 Resources** –Tier 3 includes the consultants that will be responsible for the designs and construction required at each of the schools included in the Program’s portfolio of projects. These resources will be supervised by the PMO’s Design Oversight and Construction Oversight personnel. These resources will meet on a regular basis with the PMO’s Design and Construction Oversight personnel, nevertheless these resources do not require a permanent work area within the PMO’s offices.

5.3. Proposed General Work Plan

As its first order of business, the PMO Lead Team, composed of the Program Manager and his/her immediate reports (see Tab 16, Organization Chart, Tier 1 Resources) will initiate the required planning and ramping up efforts. The Program Manager will convoke a meeting (Kick-Off Meeting) to discuss with the PRDE Secretary and his/her leadership team (PRDE Leadership Team), the PRDE’s expectations regarding this program and to identify any modifications to the general proposes work plan described in this document.

Once the PRDE’s expectations with regards to this program are clarified and adjusted, as might be required, the PMO’s Program Manager will convoke the Initial Core Team Meeting. In preparation for this meeting the PMO will review, internally with the PRDE Leadership Team, the roles and responsibilities of each of the main stakeholders in a disaster recovery effort scenario (Figure 5, Flow of Funds, Requirements and Reports) to assist our Client in maximizing its negotiation capabilities (see Table 2).

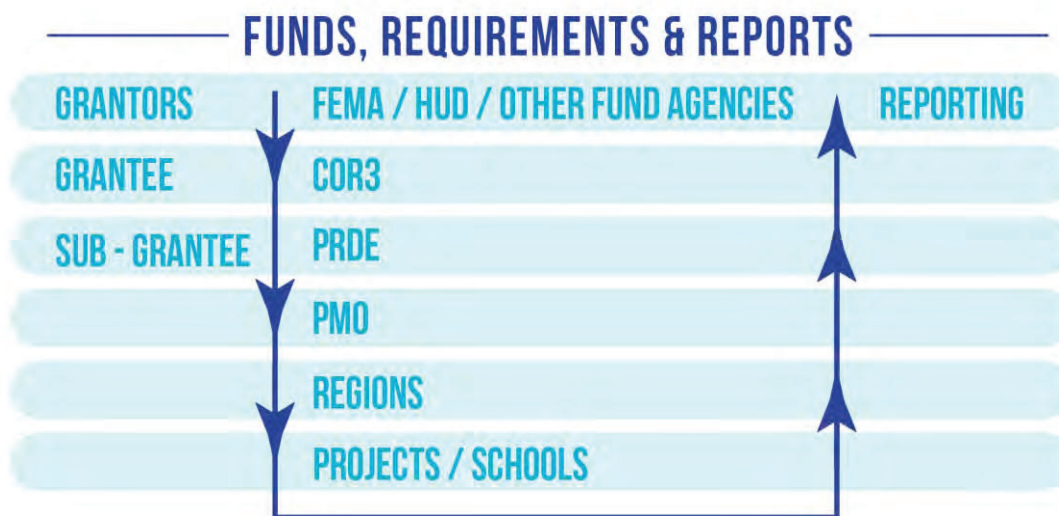


Figure 5: Flow of Funds, Requirements and Reports.

⁵ The Regional Managers’ offices will be located within their assigned regions.



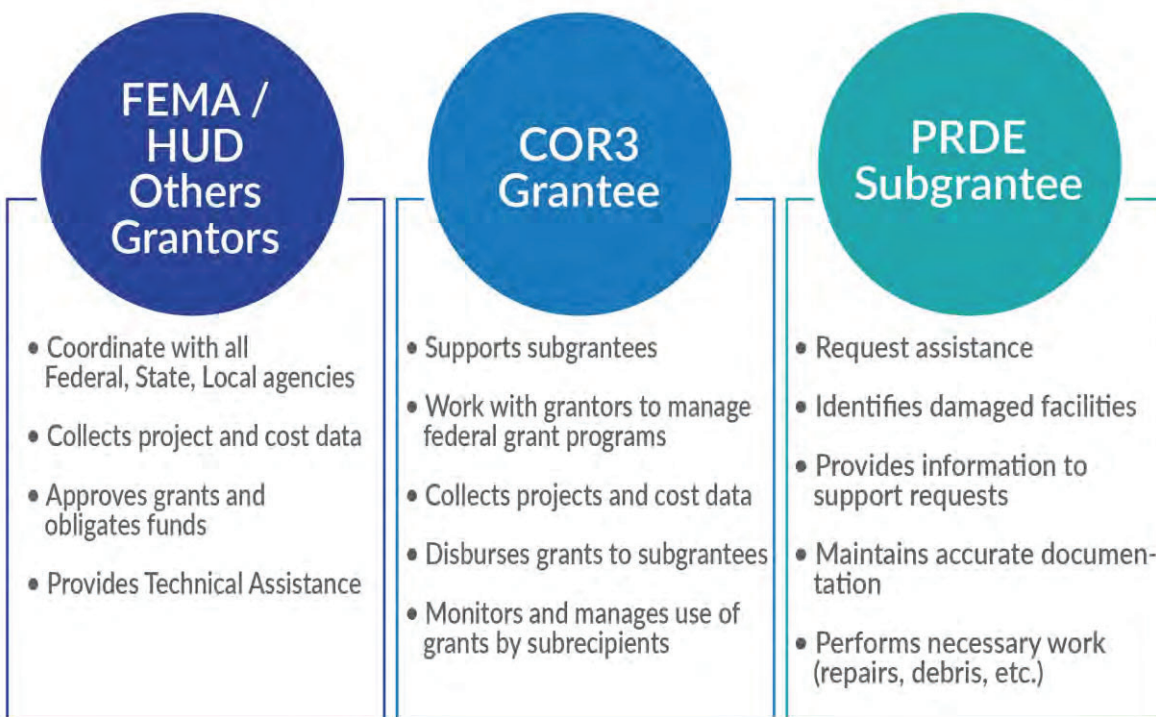


Table 2: Federal Grant Management Responsibilities per Main Stakeholders

The goal of the Initial Core Team Meeting will be to discuss, with the FEMA and COR3 resources assigned to provide services to the PRDE, the following issues:

1. Introduce the PMO resources to the FEMA/HUD/COR3 resources.
2. Notify the Core Team members (who are external to the PRDE) of:
 - a. Purpose and goal of the PRDE in creating the PMO
 - b. PMO's proposed General Work Plan
3. Review the damages sustained by the PRDE as a result of the Irma and Maria hurricanes.
4. Discuss the status of the damage assessments being conducted at the affected schools.
5. Establish the schedule for the completion of the Damage, Description and Dimensions Reports (DDDs) remaining to be finalized.





The main goal of the PMO is to complete a FEMA approved scope of work at each of the schools included in the PRDE’s Master Facilities Plan. To achieve that goal, the C3-JV proposes to complete the tasks that follow, in the three phases identified in Figure 6 (General Program Plan).

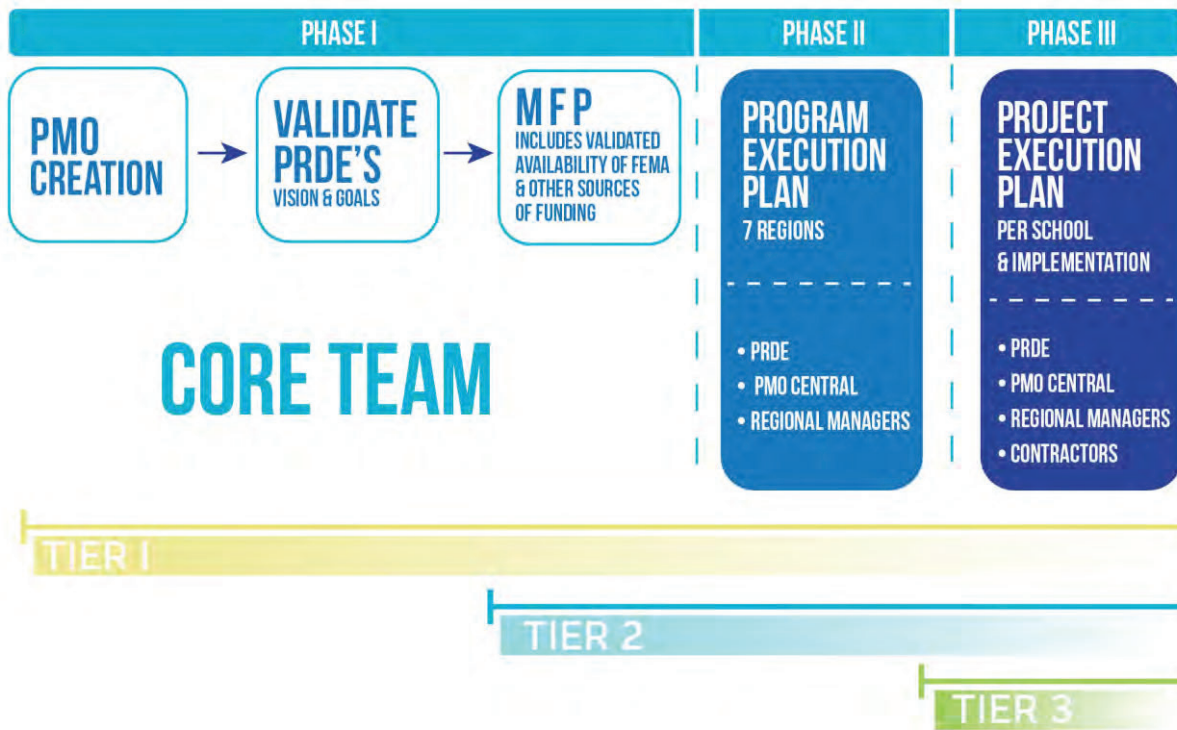


Figure 6: General Program Plan.

5.3.1. Phase I - Master Facilities Plan Creation

The main goal of this phase is to create the PRDE’s Master facilities Plan (MFP). The MFP is the document that will guide the efforts of the PMO. This document will detail the PRDE’s vision and goals regarding its recovery efforts, establish the PRDE’s priorities, strategies and the processes that will be followed to accomplish the MFP’s goals. These efforts consist of identifying all the schools to be included in the program, the damages sustained by each school, the cost estimate to repair each school and the identification of the repairs eligible for FEMA/HUD reimbursement. The creation of the MFP is collaborative effort between the PRDE, FEMA/HUD and the COR3, who will constitute the PRDE’s Core Team. As required by the PRDE, the PMO will lead the Core Team efforts to support the creation of the MFP. During Phase I the PMO personnel classified as Tier I will be activated to: support the MFP creation and to create the necessary processes and tools to support the operation of their corresponding work teams.

Grant Management Services

Maximizing the amount of FEMA/HUD grant funds obligated to this program is one of the main priorities of the PMO’s specialized staff. The Grant Management Services Team will be the PMO’s component responsible of managing funding related issues. Initially, it will be assumed by the PMO, that FEMA has not completed their scope of work on the damages to all schools and has not obtain any concurrence on the complete scope from COR3 or the PRDE. The first steps by the PMO will be to confer with the PRDE on an overall view of the process to date; to obtain the PRDE’s assessments and expectations of the damages; and to establish lines of communications with PRDE, COR3, FEMA and HUD.





Once lines of communications have been established, the PMO will work with PRDE and COR3 to manage the process in an efficient manner conducive to the PRDE's recovery plans. It is suggested that several tasks begin simultaneously at first and as the Master Facilities Plan is established, tasks are extended, completed or added.

The proposed grant management related schedule to established PRDE's damages and FEMA PA funding is included in Table 3. After conferring with the PRDE, all phases and tasks will have targeted timelines and completion dates.

All scoping of damages and cost estimate activities will be coordinated within the PMO's organization chart, COR3 representation and FEMA's damage assessment personnel. When documented properly, any previous work product will be used to expedite the process. The goal is to establish a "Standard" school scope of restoration for all facilities; maximize and coordinate funding with the PRDE's Master Plan; and to begin restoration work as soon as feasible after FEMA obligation of PA funds.

Over time, the PRDE may decide to adjust their MFP to reflect changing demographics, "Standards", community needs, or improvements to technology, construction or teaching tools. The PMO will consult with the PRDE to make modifications as needed. In addition, FEMA may augment the rules and policies governing the 428 process. In such cases, the PMO's subject matter experts will review such modifications and verify that the changes will comply with the eligibility requirements of the Section 428 program as well as substantiate that any future changes to the 428 rules and/or policies benefit the PRDE's recovery program.

Previous MFP development experience:

Our JV has deep experience in the performance of comprehensive facility master plans under governmental guidelines developing similar modernization master plans and resulting projects for many public-school districts including:

- Cranston Public Schools, RI
- Chappaqua Central School District, NY
- Middletown Public Schools, RI
- Rye City School District, NY
- Mamaroneck Union Free School District, NY
- Boulder Valley School District, CO
- Puerto Rico Department of Education, Puerto Rico
- Washington DC Schools, Washington DC
- Albemarle County Public Schools, Charlottesville, VA
- Cleveland Heights-University Heights School District, Cleveland Heights, OH
- Regina Public Schools, Regina, Saskatchewan, Canada.





GRANT MANAGEMENT PROPOSED SCHEDULE

PHASE 1:	<p>Task 1: Begin development of Master Plan.</p> <p>Task 2: Define Scope of Work for PMO to be submitted on a PW as a percentage of anticipated total cost of PA funding.</p> <p>Task 3: Define Scope of Work for Indirect Administrative cost to be submitted on Cat. Z PW; 4% or less of anticipated total cost of PA funding.</p> <p>Task 4: Define Scope of Work for Direct Administrative Cost (DAC) to be submitted on PW.</p> <p>Task 5: Define Scope of Work for a "Standard" School and Classroom; with concurrence from FEMA Center of Excellence and COR3.</p>
PHASE 2:	<p>Task 1: Define the damage inventory of Schools.</p>
PHASE 3:	<p>Task 1: Determine the DDD for each School using proper documentation obtained over the last 18 months or through conducted site inspection w/ damage description.</p> <p>Task 2: Determine the Scope of Repair work to return facility to pre-disaster condition.</p> <p>Task 3: Determine the Scope of Repair Work to restore facility to a "Standard" restoration.</p> <p>Task 4: Estimate Repair Cost for facility's "pre-disaster condition" scope of work.</p> <p>Task 5: Estimate Repair Cost for facility's "Standard" restoration.</p>
PHASE 4:	<p>Task 1: Determine if there is any Floodplain management, Environmental, Historic or Insurance policy or regulation affecting the restoration of the facility. If so, satisfy required actions to obtain positive resolution.</p> <p>Task 2: Develop any hazard mitigation proposal for each facility; obtain concurrence from FEMA and COR3.</p>
PHASE 5:	<p>Task 1: Obtain final concurrence on estimated Repair Cost for each facility from COR3 and FEMA.</p>
PHASE 6:	<p>Task 1: Designate a "Risk Management" consultant to work and mentor with the PRDE's Management department.</p> <p>Task 2: Establish an Insurance Program to comply with FEMA and Puerto Rico's Regulations, Policies, and Procedures regarding PA projects.</p>
PHASE 7:	<p>Task 1: Track and document all direct and indirect administration cost through the Grant Management process; Coordinate with the Accounting/Auditing and the Closeout sections of the JV organization plan.</p> <p>Task 2: Track and document all restoration cost with each project through the Grants</p>
PHASE 8:	<p>Task 1: At the start of each project until its completion, prepare for programmatic closeout with coordination between Grant Management, Closeout, and Accounting/Auditing sections.</p> <p>Task 2: At the start of each project until its completion, prepare for FEMA and/or Puerto Rico with coordination between Grant Management, Closeout, and Accounting/Auditing sections.</p>

Table 3: Proposed Grant Management General Schedule





Phase II - Program Execution Plan Creation & Implementation

The main goal of this phase is to create the Program Execution Plan (PEP). This document will detail how the MFP will be implemented at the seven (7) PRDE regions. The PEP is the governing document that establishes the means to execute, monitor, and control projects. The plan serves as the main communication vehicle to ensure that everyone is aware and knowledgeable of project objectives and how they will be accomplished. The PEP describes who does what and how, defining the policies, procedures and priorities that will be adopted. The PEP maps out the means and method to execute the MFP developed on the previous phase. At this stage, our Team believes that the Outreach Program kicks off gathering input and developing strategies. More details of the program can be found in the following section.

Community Outreach Services

The PRDE is engaging in an unprecedented effort to transform the current PR education system into a system that caters to the needs of the 21st century students. Hurricanes Irma and Maria caused significant impacts to the schools managed by the PR public school system. PRDE will revitalize its educational communities by rebuilding schools into safer and more resilient facilities. These efforts require continuous and effective communication amongst all the stakeholders involved in the complex process of recovery.

The PRDE's PMO Community Outreach Team (COT) will be dedicated to managing the communication needs of the PMO's stakeholders. The prime objective of the COT will be to maintain effective and productive channels of communication between the PRDE's Office of Recovery and Resilience, the PMO and the PRDE students, parents, teachers, community leaders, local elected officer and community groups. Building and maintaining goodwill amongst the PMO's stakeholders will have the effect of avoiding or minimizing delays in the PMO's work schedule due to lack of communication or miscommunication issues. These efforts are most relevant during the construction phase of the projects, when interrupting the work of mobilized contractors results in the Project Owner's (PRDE) responsibility to pay, from non-federal sources, for their unscheduled down time.

The COT will work hand in hand with each of the PMO's stakeholders to provide general program status updates, construction updates, coordinate responses to issues, and inform and connect residents of the communities where construction activities will take place of career opportunities available through HUD's Section 3 program⁶.

Managing human interactions is a complex endeavor which requires careful and mindful planning and execution. The COT's efforts will be guided by a Community Outreach Plan. This plan, prepared in collaboration with PRDE representatives, will:

- Document the PRDE's communication vision and goals regarding its recovery efforts
- Identify the PMO's audiences/stakeholders and their information needs
- Establish the strategies and methods to be implemented to maintain effective and productive channels of communication with the PMO's stakeholders
- Establish the processes by which the COT Manager will ensure that the messages provided by the CO Team are authorized by the appropriate PRDE representatives prior to dissemination.
- Establish the metrics that will be used to measure the effectiveness of the strategies being implemented based on the PRDE's goals.

Figure 7 shows the two general phases and stages in which the PMO's efforts can be segregated, based on the evolution of the messages that need to be transmitted to the stakeholders as the program progresses

⁶ Under Section 3 of the HUD Act of 1968, wherever HUD financial assistance is expended for housing or community development, to the greatest extent feasible, economic opportunities will be given to Section 3 residents and businesses in that area. It is a means by which HUD fosters local economic development, neighborhood economic improvement, and individual self-sufficiency. Section 3 is the legal basis for providing jobs for residents and awarding contracts to businesses in areas receiving certain types of HUD financial assistance.





from pre-construction efforts (planning, permitting, design, bid) to construction. Figure 8 presents the summarized work plan for managing communications throughout the stages of the program execution at the project level at each school.

The COT will maximize the use of the technological tools available to the PMO and the PRDE for communication purposes. Specifically, the PMO will assist the PRDE by creating content that can be published through the PRDE's electronic portal. By creating an electronic page dedicated to publishing public information regarding the PRDE's Office of Recovery and its PMO, the agency complies with its responsibility of maintaining the public informed on the progress of the federally funded programs it manages.

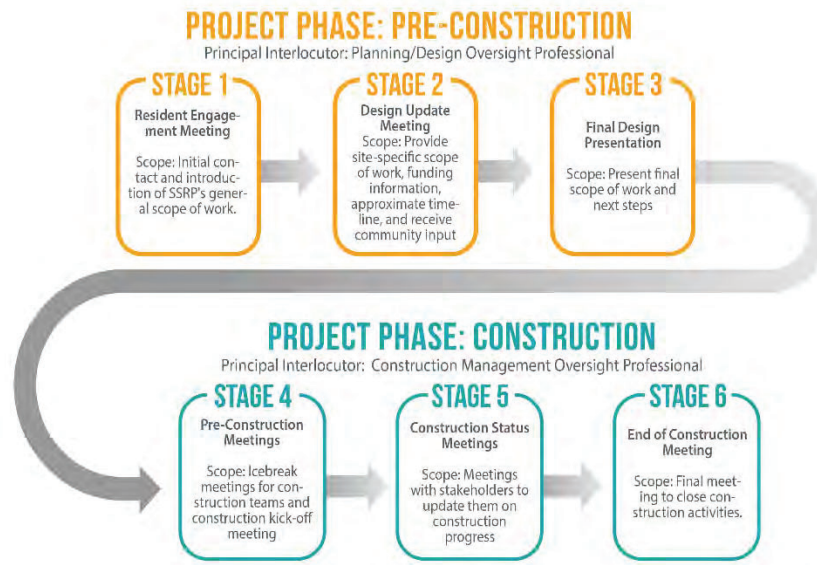


Figure 7: Proposed Grant Management General Schedule

PROJECT PHASE: DESIGN
Principal Interlocutor: Design Oversight Manager

	MEETING TITLE	FREQUENCY	TRIGGER	WHEN	CONVOKER	CONVOKED	COT CONVOKED	GENERAL SCOPE	COT SCOPE
STAGE 1	RESIDENT ENGAGEMENT MEETING	One instance	PRDE's authorization to engage external stakeholder	As scheduled in coordination between the PMO Design Manager, the COT Senior Advisor and the COT Op Manager	PMO Design Manager	* PRDE representatives/ PMO Leaders * PMO Design Manager * PMO Community Outreach (PMO COT)	* CO Senior Advisor * COT OP Mngr	* Initial Contact * Introduction of the PRDE's general scope of work * Meet the Design Team	Initiate efforts to establish a working relationship with external stakeholders: *Students & Parents *School Principals *Teachers *Subconsultants (Designers) * Adjacent Communities * Promote resident's participation in Section 3 program
STAGE 2	DESIGN UPDATE MEETING	One instance as might be deemed necessary by PRDE or the PMO design manager	Design at 50% completion	Not before design is at 50% completion. No later than design reaching the 90% completion benchmark.	PMO Design Manager	* PRDE representatives/ PMO Leaders * PMO Design Manager * PMO Community Outreach (PMO COT)	* CO Senior Advisor * COT OP Mngr * Area COT Field Coordinator	*Specific scope of work for each development. *Schedule *Funding information *Receive community input	*Coordinate event *Promote residents participation in Section 3 program
STAGE 3	FINAL DESIGN PRESENTATION	One instance	Bid documents ready to be published	No later than one week prior to bid documents going public.	PMO Design Manager	*PRDE representatives/ PMO Leaders *PMO Construction Oversight *Construction Manager *PMO COT	* CO Senior Advisor * COT OP Mngr * Area COT Field Coordinator	*Present final scope of work and next steps. * Introduce the PMO Construction Manager to the community stakeholders.	*Coordinate event *Promote residents participation in Section 3 program



PROJECT PHASE: CONSTRUCTION Principal Interlocutor: Construction Oversight Manager

	MEETING TITLE	FREQUENCY	TRIGGER	WHEN	CONVOKER	CONVOKED	COT CONVOKED	GENERAL SCOPE	COT SCOPE
STAGE 4	ICEBREAKER 1 Internal Stakeholders & Contractors	One instance	Letter of Award (LOA)	No later than 1 week after LOA	Construction Oversight Manager	* PMO Design Oversight * PMO Construction Oversight * PMO Community Outreach (PMO COT) * Construction Manager * General Contractor	* CO Senior Advisor * COT OP Mngr	Meet the Team	Brief stakeholders on status of PMO relationships with: * PRDE Regional Managers * School Principals * Educational Communities Section 3 jobs status
	ICEBREAKER 2 Internal / External Stakeholders & Contractors	One instance		No later than 2 weeks after LOA	Construction Oversight Manager	* PMO Design Oversight * PMO Construction Oversight * PMO COT * Construction Manager * General Contractor * Tenant Association President * Property Manager	* CO Senior Advisor * COT OP Mngr	Meet the PRDE PMO Team	*Inform the change in project command (from Design Oversight to Construction Management Oversight) *General project schedule *Location of trailers *Section 3 jobs status
STAGE 5	CONSTRUCTION KICK-OFF	One instance	Notice to Proceed (NTP)	Not before NTP is granted to the General Contractor	Construction Oversight Manager	*PMO Design Oversight *PMO Construction Oversight *PMO COT *Construction Manager *General Contractor *Other Contractors *Electrical Generators Manufacturer *Tenant Association President *Property Manager	* CO Senior Advisor * COT OP Mngr	*Scope of Work *Schedule *Phases of construction *Location of work areas	*Interaction of the COT members during the duration of the construction phase with the Regional Managers, School Principals and Educational Communities. *Section 3 jobs status
	MEETING WITH SCHOOL PRINCIPAL	Monthly	N/A	As scheduled by the Principal	PRDE PMO	*PMO Construction Oversight *PMO COT	* Area COT Field Coordinator	*Provide general construction updates to Principals.	*Section 3 jobs update.
	UPDATE TO EDUCATIONAL COMMUNITY	Quarter / Biannually (TBD)	Agreed upon schedule or significant construction event	Agreed upon schedule or significant construction event	PRDE PMO	*PRDE representatives/PMO Leaders *PMO Construction Oversight *PMO COT	* CO Senior Advisor * COT OP Mngr * Area COT Field Coordinator	*Provide construction status updates to Students, Parents, Teachers, Principals and the communities.	*Section 3 jobs update.
STAGE 6	END OF CONSTRUCTION MEETING	One instance	PRDE acceptance of construction site back from General Contractor	Agreed upon schedule	PRDE PMO	* CO Senior Advisor * COT OP Mngr * Area COT Field Coordinator	* CO Senior Advisor * COT OP Mngr * Area COT Field Coordinator	*Return the site to the Educational Community	*Provide final report on construction efforts to the Educational Community.

Figure 8: Community Outreach Plan at the School Level

Setting up the Compliance Program:

Compliance – Team C3-JV recognizes all costs incurred due to the scope of work addressed in this proposal must comply with all federal regulations governing the cost eligibility. Our Team will provide knowledgeable and experience personnel (indicated in resumes) in the management of FEMA and CDBG contracts and the QA/QC of documenting and invoicing all costs attached to the scope of work and its administration. All programs documenting work and administrative activities will include established protocols, qualifications and requirements to comply with Federal and State awards and their governing regulations. Specifically, all costs will comply with the Uniform Administrative Requirements, Cost Principles and Audit Requirements of 2 CFR, Part 200, and CDBG regulations 24 CFR 570. Additionally,



the JV's documentation systems will track and report all costs associated with small business per 2 CFR 200.321.

The JV's tracking and reporting systems will document all costs from the first day of operation to the last in order to comply with FEMA's and CDBG's eligible cost criteria. Our system will have capabilities to issue reports on a weekly basis tracking such costs resulting in the ability to identify and manage any costs that would be questioned by future federal and state agencies regarding invoicing, auditing and closeout processes.

5.3.2. Phase III – Project Implementation Plans (PIPs)

Managing a mix of projects with a variety of schedules, budgets, priorities and complexities is a challenge. During the PEP, most of the ever-shifting requirements of the Program are believed to be settled. A clear framework establishing a common understanding of the vision and goals become the pillar into implementing and fulfilling PRDE's vision and transforming it into reality. The Execution Phase, also known as the Operational Phase, takes all individual projects into fruition using the paradigms and orders established in the previous phase. It is during this phase that the project becomes visible to outsiders. This phase is subdivided into the following main three areas:

- Pre-Construction
- Construction
- Post Construction / Operations

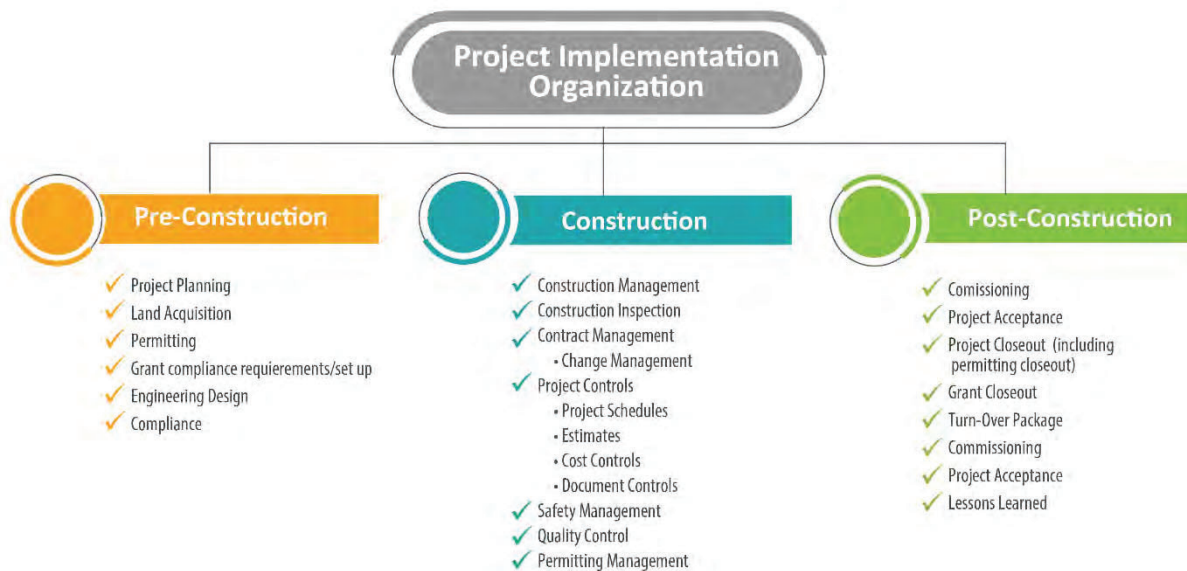


Figure 9: Project Implementation Organization

Figure 9 provides an overview of the proposed operational organization. It also provides a summary of the sub tasks within each of the three main responsibility areas.





(a) Pre-Construction: This phase is believed to be the foundation of the Execution Phase. During this phase you perform all activities needed prior to Construction work commencement while the program support services are in place to oversee execution of the project portfolio and the lifecycle of each project. Under this pillar, the individual project planning begins, project controls are established, individual project funding is identified, permitting and land acquisition studies are conducted to enable contracting project delivery consultants. Several on-site exercises are also performed during this phase as field studies may be necessary (e.g., surveying, geotechnical studies among others). While there are other important tasks performed during this phase, the Design Phase is known to be the most important output. Local presence, knowledge of permitting and environmental regulations and code compliance is essential to this exercise. Our Team proposes to perform this phase breaking the efforts into seven elements: (i) Project Planning, (ii) land acquisition, (iii) permitting, (iv) grants compliance requirements, (v) design, (vi) procurement and (vii) construction management.

Project Planning: Planning is the most important step in a project life cycle, and effective management of any major infrastructure program requires experience in all aspects of evaluation and assessments, planning, design and pre-construction activities with the establishment of a project budget that includes all the key components of the Master Plan. The **C3-JV** team members brings to the table previous experience in Puerto Rico based projects in all levels of planning, including master plans, feasibility studies, logistics budgetary cost, code reviews, community outreach and conceptual designs attending the need of other governmental entities as well as the industrial sector.

All the projects will be evaluated to confirm the current Master Plan is in accordance with the objectives of the PRDE in each region, as established in the preliminary assessment and scope of work definition. In addition to looking at project-specific needs, the effort will embrace regional needs, and will also look for effective interfaces with other regions to achieve efficiencies of scale within the Island. The team **C3-JV** will exchange information with PRDE designated personnel and support the development of a CIP to meet the PRDE's short and long-term goals for the MFP.

The Project Planning and Development Team will provide the following services:

- Review and update as necessary the scope of work based on the preliminary assessments received from the PRDE/FEMA damage assessment documentation.
- Develop Conceptual or Basis of Design for each school impacted by the program
- Develop project budgets for every school
- Develop and maintain the CIP that will serve as a decision making tool for the PRDE



The planning tasks will include:

- Review planning documents prepared by PRDE/FEMA, damage assessments, environmental assessment documents, and related information
- Assure the execution of the project in compliance with all applicable federal and local laws, regulations, and permit provisions

Land Acquisition: Land acquisition of properties and easements might be needed in some specific project cases. The **C3-JV** team members have worked extensively with other public entities such as PRASA and the PRHTA on land acquisition and will provide the experience and know-how on how these bureaucratic processes can be effectively managed, so this issue does not affect the projects critical path.


The land acquisition tasks will include monitoring the progress of land acquisition efforts, as they relate to project delivery schedule.





Team **C3-JV** will provide to the PRDE the necessary support to perform land acquisition tasks (if required), including the following:

- Identifying all properties and easements required to implement the capital improvements, including the priorities thereof
- Preparing land appraisals and surveys
- Obtaining “Certificaciones Registrales” from the appropriate Property Registrars
- Preparing draft offer letters to landowners
- Have legal counsel prepare “Legajos,” “Escrituras,” and other legal documents required for presentation in Expropriations Court
- Representing PRDE in Expropriations Court
- Coordinating with PRDE in the distribution of checks to affected parties
- Monitoring land acquisition progress, including schedule and quality of deliverable


 **Permitting:** As a local team, we have the experience and the contacts to effectively work with regulatory and infrastructure agencies. The know-how of how to effectively manage issues with agencies such as PRASA and PREPA as well as Federal and Local agencies such as the Environmental Quality Board, Department of Natural and Environmental Resources, Environmental Protection Agency, Autonomous Municipalities and OGPe is a key component to develop realistic budgets and schedules. Over the years, we have developed strong and professional working relationships with the technical personnel at these agencies.

The capabilities of the **C3-JV** include a comprehensive range of environmental services required for permitting and special studies such as Lead Based Paint and Asbestos Containing Material Assessments. Our knowledge in the regulatory issues will help to deliver the permits and endorsements, from the initial environmental assessment’s documents, through the preparation of construction permit applications, and finally the occupancy permit.

The **C3-JV** will make sure that any construction is developed and managed in general compliance with current environmental and construction regulatory permitting processes. Therefore, successful compliance and permitting strategies require knowledge of the regulations, as well as relationships with the various agencies at the federal and local level.

The permitting team will provide the following services:

- Develop a permitting strategy and negotiate such strategy with applicable regulatory agencies
- Establish an environmental document format and permitting protocol
- Prepare required documentation and applications
- Manage and coordinate all aspects of the permitting process
- Monitor progress of deliverables and permits
- Interface with regulatory agencies

 **Grants Compliance Requirements:** Team **C3-JV** fully understands that the program will be funded with FEMA PA grants and HD CDBG-DR funds. The **C3-JV** will ensure compliance with all applicable PRDE policies, federal and local laws, and regulations, executive orders, inclusive of all HUD and FEMA requirements. Our Team brings the experience in many other projects federally funded like the ARRA program and the funding mechanisms, managing the allowable costs to assure compliance with funding stream requirements.





Engineering Design: Due to the complex and magnitude of this program with over 1,100 projects, we clearly understand that many design consultants will be working concurrently on various projects to comply with the work outlined as expected. To successfully complete the work, it is essential to have completed the planning process and having developed accurate project scopes. We will coordinate the contracting of final design services to subconsultants and monitor their services throughout the program. We know the local market and the technical resources available first hand based on our experience over 40 years right here in Puerto Rico.

During the design phase, the **C3-JV** will constantly assess the MFP document, to ensure conformity with projects cost, schedule and performance goals. **C3-JV** will ensure that all architects and engineers working in the program are licensed in Puerto Rico.

The timely success of any large, complex program requires a clear, straightforward approach. We have found that this approach must consist of certain key elements, including:

- Manage/coordinate implementation of work by architectural/engineering firms
- Review design progress reviews
- Revise and QC including architectural, structural, mechanical, and electrical calculations and drawings.
- Revise and QC specifications for general, civil, structural, mechanical, electrical, and controls work
- Provide technical consultation
- Prepare Bid Documents including plans, specifications, and cost estimates
- Monitor performance, review invoices, and recommend progress payments

The design tasks will include:

- Assure design milestones are being met through project metrics
- Assure designs are properly vetted by all stakeholders
- Conduct design QA/QC audits on a periodic basis
- Review, as requested, all design documents prepared by others, including architectural and engineering studies and reports, design documents, and related information
- Review design cost estimating – we will provide for updates to planning/design-level cost estimates that may be required; this function will not replace the responsibility of the design teams to generate cost estimates for their completed work.
- We will also provide independent estimates of the cost of extra work or change orders for purposes of negotiating costs of change and claims, if required.

Procurement: Team **C3-JV** has ample experience moving projects through the procurement process for other CIP. To further enhance our strength in this area, we will provide a Procurement Leader, with the necessary experience to successfully complete the procurement process. The **C3-JV** will lead all procurement activities associated with selection and development of project delivery teams for all MFP project according to applicable PRDE local and federal laws.

AFFIRMATIVE STEPS



All three companies of Team C3-JV are MBE certified under the Puerto Rico National Minority Supplier Development Council.



During the Procurement process, our Team will encourage and comply with 2 CFR, Sec. 200.321. We see great opportunities as the Program will have several components such as Design, Construction, Supplies, and others that will require competitive bidding processes.



Compliance with HUD Section 3, particularly during the Construction Phase. Section 3 program *requires that recipients of certain HUD financial assistance, to the greatest extent possible, provide training, employment, contracting and other economic opportunities to low and very low-income persons, especially recipients of government assistance for housing, and to businesses that provide economic opportunities to low and very low-income persons.* (<https://www.hud.gov/section3>)





The procurement team will have the following responsibilities:

- The preparation of bid documents
- Assure all permits are received before proceeding with the bidding process. No project will be allowed to proceed to bidding or construction until these requirements are met
- Confirm the availability of funding before proceeding with the bidding process
- Coordinate the bidding process activities with PRDE and the design consultants
- Assist with bid solicitations, preparing advertisements and attending pre-bid meetings
- Conduct technical reviews of bids
- Assist in the preparation of construction contracts
- Assist in negotiating and executing construction contracts

The procurement tasks will include:

- Provide assistance in the procurement of construction firms, including preparation of advertisements; assist with evaluation or vetting of qualification statements; perform experience and background investigation; and assist you in negotiating and writing agreements with construction firms
- Explore alternative procurement, contracting, and/or delivery approaches to optimize, streamline, and/or increase efficiency and productivity as appropriate to maximize return on investment while achieving your strategic and programmatic objectives
- Develop a logical sequence of construction bid packages and/or program delivery strategies that ensure facilities remain operational and in regulatory compliance during construction
- Evaluate strategies to reduce costs and increase quality.



(b) Construction Phase: The Construction Phase focuses mainly on all construction related activities. While it is highly visible, it also requires highly controlled environment. The **C3-JV** Team has the capacity and expertise to establish the processes to plan, executive and monitor all construction activities. Some of the services performed during this phase are the following:

Construction Management: Our team brings proven expertise in program management required to successfully deliver projects in the most cost effective and efficient manner. We have developed methods and procedures to efficiently control the schedule, costs and quality of the projects to ensure the successful implementation of the program. The **C3-JV** will establish specific procedures, between Client, Designer, Contractors and Suppliers in order to maximize execution and minimize conflicts. A stakeholder management plan will be in place including the process required to identify the people, groups or organizations that could impact or be impacted by the projects. Our team will also develop management strategies for effectively engaging stakeholders in project decisions and execution.

The construction management team will provide the following services:

Construction Inspection: Our team has the necessary experience and procedures to perform project field inspections to ensure compliance with the contract documents and specifications.

Project Controls: Cost controls will be performed throughout the life of the Projects. This process will go from the Pre-Construction Process through the Construction Phase, including budget review, estimate and bid evaluations, applications for payment reviews and construction reports to assure Project on budget finish. Establishing effective project controls from conceptual planning of a project is essential to mitigate risks and maximize the possibility of success. Establishing effective project controls safeguards the interest of the parties involved and maintains high levels of quality and transparency. Our project





controls tools also allow us to monitor the progress of the project in order to provide our client with real-time, accurate information and providing them with the information they need to assist them in their decision-making process.

- **Project Schedules:** By means of this tool, we can develop action plans, identify critical activities and prioritize them, track the effect of weather and field conditions, analyze the rate of progress and identify the possible consequences of changes to the scope of work. A master schedule will serve as the planning tool that communicates the overall project strategy, defines the activities to be performed by each project member and provide project progress. This Master Schedule will incorporate design, procurement, construction, commissioning and project closeout.
- **Estimates:** The **C3-JV** Team will have a dedicated estimating team with proven experience to provide conceptual cost estimates and detailed construction cost estimates. This group of professionals also provides support to our field operations during the construction process for change order evaluation and forecasting construction costs. The Team will have also provided support during the MFP phase for the proper budgeting of the overall CIP.
- **Cost Control:** The primary function of a cost control system is to establish the controls and reports to monitor the overall program budget and master schedules for all projects within the program in compliance with State and Federal guidelines. In addition, the following activities will be performed:
 - Cost tracking, progress measurement, evaluate trends & define cost to completion.
 - Cost trending
 - Change order evaluation
 - Cost to complete
- **Document Control:** Our services include the issuance of project control documentation to ensure a continuous flow of communication between all parties involved in the project. We provide the drafting of minutes, periodic progress reports, maintenance of permanent project files, preparation of final acceptance and project closeout documentation.
- **Change Management:** Our change management process will provide the necessary mechanisms to effectively identify and manage proposed changes that may impact the project cost and/or schedule. A change approval committee will be formalized early in the project. This approval committee will include members from both the owner and **C3-JV**. Once this team is established the approved procedure will be published. Our team will be the responsible party for the formal implementation of the project change management procedure.
- **Safety Management:** Our team is committed to the highest standards of safety in our projects, our goal is to create and promote a safety culture clearly established at ZERO recordable cases and preventing all incidents and accidents with a proactive culture. To maintain a high quality service and an exceptional safety record, we will require each Contractor to prepare and submit a Safety Program for review in accordance to OSHA requirements. The **C3-JV** Team will also coordinate and provide safety orientations to the project staff and contractors promoting a safety culture at project sites. As part of the Safety requirements, the **C3-JV** team will perform weekly safety site inspections and provide a detailed observation report indicating areas to be addressed. Finally, **C3-JV** would develop a Program Safety Manual for the members of our Team to follow best management safety practices.
- **Quality Control:** Our Quality Control Plan (QCP) describes the organization and control procedures to be implemented during all phases of construction. This plan is created early in the project; and will include observation and inspections, test-plan will include required tests for the several project discipline and phases, sample evaluations-plan will identify desired samples, among others.
- **Permitting Management:** We have the experience and the contacts to effectively work with regulatory and infrastructure agencies. Our team will perform the required inspection, documentation,





non-conformances and reports in compliance with the local regulations. Our team will ensure that the projects meets with the approved permits and regulations.

● **Contract Management** - Our team will prepare bid packages, invite contractors' companies for the pre-bid meetings, and will coordinate the response for the request for information (RFI) questions on time. The team also will provide support conducting fact finding meetings after bid documentation is received and will support the PRDE in the contractors' proposal evaluation and selection.

● **(c) Post Construction Phase:** The **C3-JV** Team will provide start up coordination and commissioning support services for the successful transition from construction to validation and subsequent operation. These services are provided to ensure that building and process systems are fully functional. The **C3-JV** Team verifies that equipment and systems meet program needs, are fully operational and that manuals, warranties and information of proper operation and maintenance are adequate and delivered to the end user. Our team will have processes in place to formally complete the projects, permitting requirements and contractual obligations to assure projects are finalized within the established schedule and all necessary information is transferred to the Owner. The post construction management team will provide the following services:

- **Commissioning:** Our team will provide start-up coordination and commissioning support services to assure the projects are fully operational as per school design and specifications. Our services include equipment and system start-up, schedule and tracking tools to monitor progress of the commissioning and closeout.
- **Project Acceptance:** Upon projects Substantial Completion, our team will conduct walk-throughs, will develop and maintain punch list items and will support coordination activities to allow the punch list correction on a timely manner. Final completion forms will be issued to document that the punch list items are closed and the project is completed as per design and specifications. Final Release and final payments will be recommended after project acceptance approval.
- **Project Closeout:** As part of the project closeout, our team will ensure that all permits requirement has been completed and submitted to the corresponding agencies in order to get the approval of the Occupancy Permit in a timely matter. Turn over packages will be developed with the required documentation such as the Substantial Completion, Final Acceptance, As-Built Drawings, Spare Parts, Manuals and Warranties. Our Project Closeout program will be integrated with FEMA and HUD, FEMA Closeout Checklist
- **Lesson Learned:** Our team will record lessons learned as a key component of the project closing, allowing the organization to maintain and reuse lesson learned for future or similar projects.

6. Estimated Timeframes

Figure 10 (Proposed Program Approach/Schedule) shows our approach to the Program in a chart format. It identifies the 3 Phases in which we have divided the Program and illustrates how the three phases might overlap. Based on the available information we estimate that the Program's Phases will have the duration detailed as follows:

- **Phase I** – Create the MFP – We estimate the duration of this phase to be between 3 to 6 months (Program Months 1 to 6). The duration of this phase is a factor of how many schools have been assessed for damages and the status of the negotiations of the scope of works with FEMA/HUD for the SOW of each school to be approved for funding at the time that the PMO is constituted.
- **Phase II** – Create and Implement the Program Execution Plans (PEPs) (one for each region). We estimate the duration of this phase to be between 3 to 6 months.





- Phase III – Projects Implementation Plans (PIPs) (one per school). This phase, while initially contracted for 3 years, has an estimated duration of 8-10 years (assuming a CIP that impacts 85 schools per year).

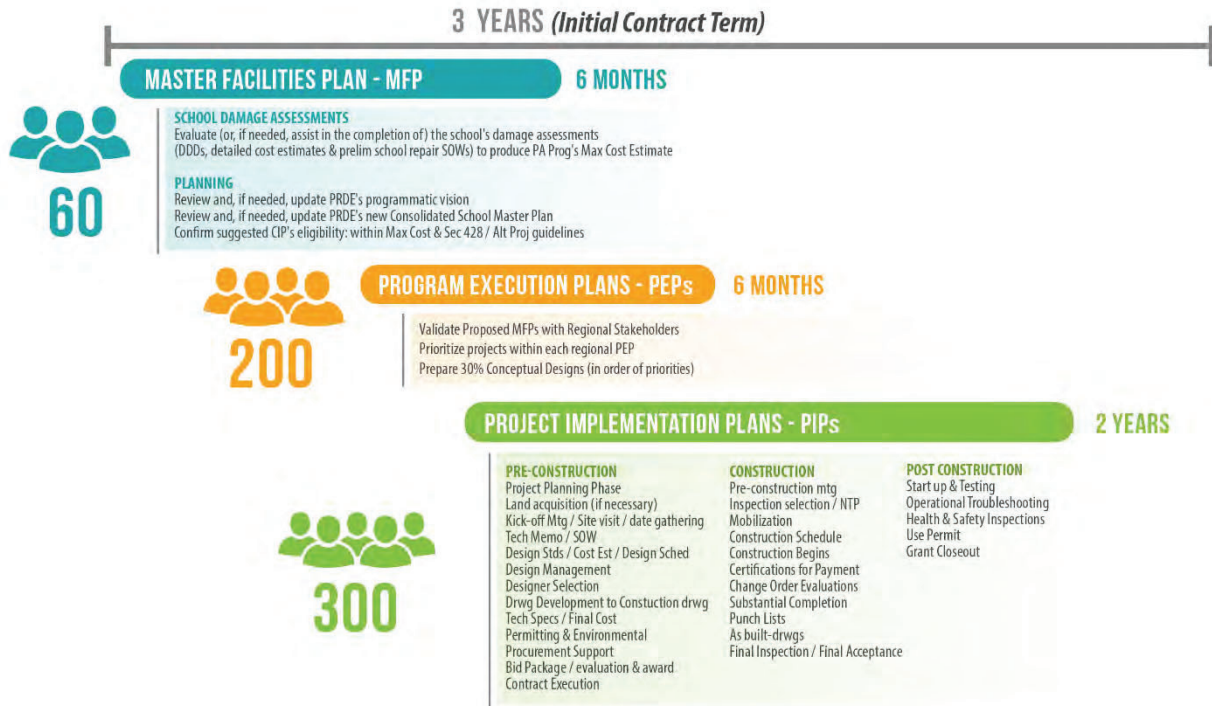
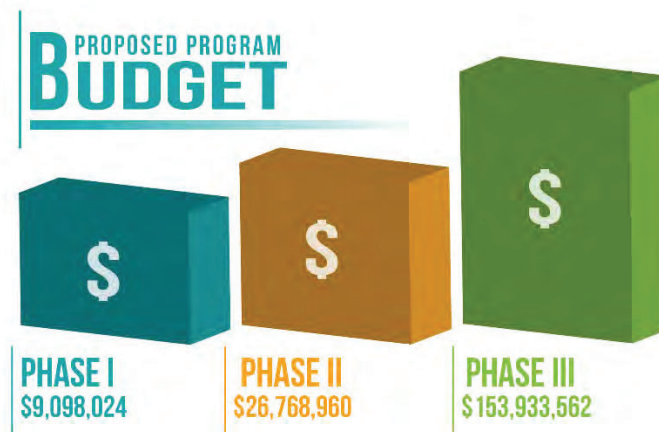


Figure 10: Proposed Program Approach & Budget



7. Performance Measurement and Reporting

Data Management, Quality Assurance and periodical reports are essential activities of an effective PMO. For this reason, data is an asset that can be found in every single process performed in a PMO. Whether data is managed in a simple Excel spreadsheet or a collection of cloud-based & on-premises hybrid data warehouses, Acumenian will find the best methodology that will allow a complete analysis of your data to





visualize and discover what is not evident. Team **C3-JV** through **Acumenian**'s core services includes Data Analytics, Custom Reporting Services and Strategic Data Visualizations. Furthermore, we will combined the Project Management and Information System (PMIS), PROCORE as a tool to optimize the PMO's project management and project controls activities while effectively managing the documents inherent to the execution of a CIP. By being a web based, efficient solution, it will allow the PRDE to share information throughout all project locations.

Procure is a leading provider of cloud-based applications for construction management. This software connects people, applications, and devices through a unified platform to help construction professionals manage risk and build quality project safely, on time and within budget. Procure is a complete and integrated solution with products for Project Management, Construction Financials, Quality & Safety, and Field Productivity. For such reasons Procure becomes an indispensable project management tool set to create a collaborative space and project archive that allows: unlimited users and cloud space, instant access to up-to-date project data 24/7, decisions from the job site based on real time information, improved communication and collaboration with all stakeholders, instant notifications, complete mobility through the use of tablets and smartphones, consolidation of all documents in a central document repository, shortened project closeout process, drawings and submittals management, automated and synchronous drawing updates and increased accountability among team members.

Acumenian is the only authorized representative and service provider for Procure in Puerto Rico. All our employees are Certified with Procure and our team is fully capable to implement, train, manage, support and audit, to assure that proper use of the Platform across all PRDE-PMO Recovery Projects.

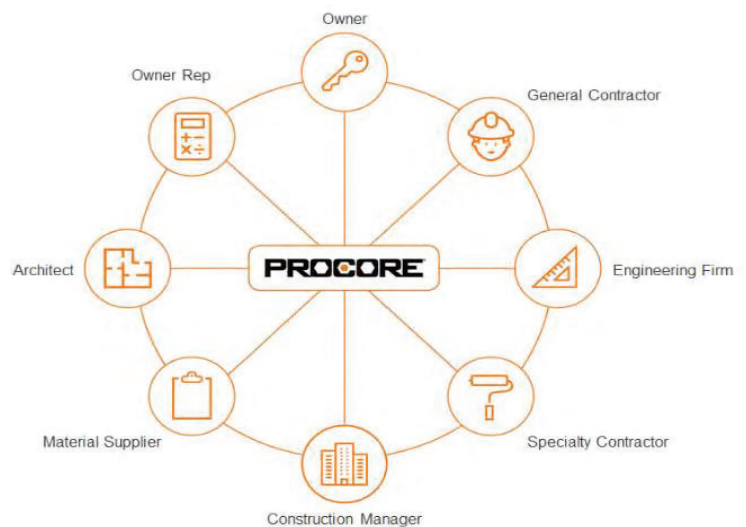


Procure Implementation Plan

Our team is dedicated to ensure the PRDE successfully implement its MFP. To assure the goals are met, Team **C3-JV** proposes to implement Procure's Construction Management Platform across PRDE's Recovery Office (and PMO) as well as on its Recovery Reconstruction Projects, making sure that all participants have access to the system. The goal is to have the PMO's staff trained on the proper utilization of Procure to perform their respective responsibilities. During the process Acumenian will assign an Implementation Project Manager (IPM) that will guide PRDE through each phase and provide technical expertise to End-Users. Together, our Team and Procure will together to ensure that PRDE-PMO's goals are surpassed by making sure that the entire implementation process is efficient.

Implementation Scope

Procure Account Set-up: Once implementation kick-off begins, initial advisory sessions will be held with Procure and a Implementation Team Committee (ITC) to establish the project timeline and get an overview of current processes, key stakeholders, and expectations. ITC discusses current business processes and defines them within Procure. The idea is to walk away with a clearly defined implementation plan. As implementation planning takes place, it is important to set the minimum standards for the use of the system in PRDE-PMO Projects. The implementation scope will start with a Launch Meeting where recommended steps will be explained for a





successful implementation of Procore across PRDE. The Implementation Plan is reviewed over objectives, strategies and timeline for rollout.

ITC Members will be initially rolling out Procore in 4 phases. Implementation will be scheduled as per PRDE-PMO specific needs and will consist of the following tools:

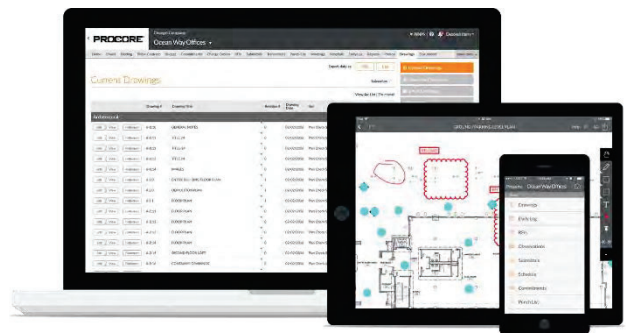


Recognizing that effective communication is critical to the success of the implementation of any program, the ITC will serve as Chief Communication Officer in this process. All issues should be reported directly to the ITC. Once the participants complete their Train-the-Trainer Program, they will become Team Representatives and will serve as liaisons between regional offices and ITC Members. The ITC will recommend to develop communication strategies to devise internal campaigns in order to generate enthusiasm and acceptance of the end-product.

Project Set-Up

The ITC will develop a project "template" to serve as a base for future projects on the platform. This process will ensure all projects have the same configurations and settings.

Based on the Advisory Sessions and Launch Meeting, the ITC will recommend a phasing strategy for the initial implementation to introduce certain tools to managers and other stakeholders. The inaugural tools should be focused towards those activities most relevant to PMO Staff and Project Managers; such as: Submittals, RFIs, Meeting Minutes, Daily Logs, Documents, Drawings, Bidding and Cost Control tools, among others. Additional tools can later be enabled and implemented based on as-per project requirements. Among those tools are: Procore Drive (PC only) and Procore for Mobile.



ITC will develop Standard Operating Procedures (SOP) outlining PRDE-PMO Project's way of utilizing the platform according to agreed standards. Advisory sessions will be coordinated to provide a detailed understanding of the Platform and define PRDE SOP's, as it pertains to Procore. During these sessions ITC will:

- Establish workflows and standard processes for all tools.
- Customizing system configurations and procedures. Such as:
 - Establishing user permission templates. Permission templates customize and enforce consistent levels of access across project collaborators.
 - Configuring standard project templates (i.e. standard folder structure, privacy settings, etc.)
- Complete database setup:

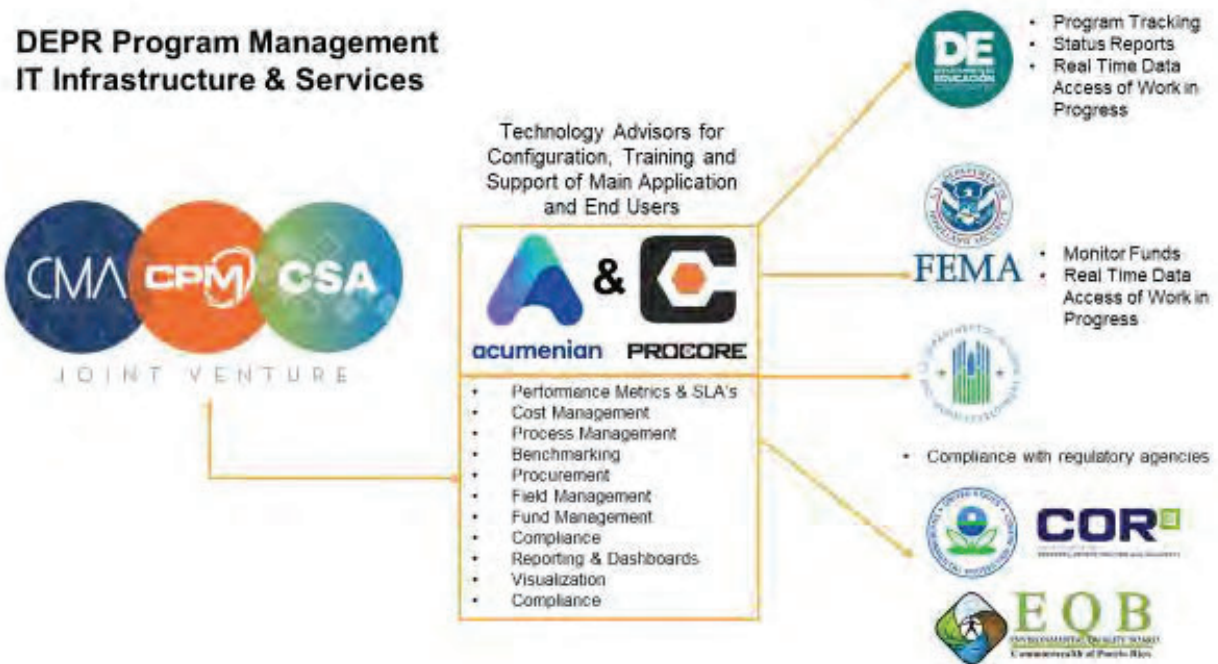




- o Contact data import - ITC shall create user accounts for all of your employees who will be using the application
- o Form customization and workflow design
- o Project types, roles, stages, programs, departments, etc.

Rollout: The system roll out will be accomplished through multiple strategic steps, allowing for early adopters to have quick use of the system and a gradual acceptance of the total functionality of the software. This tool-by-tool approach is effective because it enables users to manage the software before it is required to be used across PRDE-PMO Projects. Initial online trainings, followed by a calibrated-limited use of the system will enable users to get comfortable with the software at a healthy pace. This “familiarization process” usually lasts around 3 to 5 months, but will be defined in coordination with PRDE and PRDE-PMO.

Post Implementation Support: Acumenian will establish a Help Desk Center, as part of its IT Service Management Solutions, to provide technical support to end-users. Also every End-User will have access to Procure’s support resources, accessible from the software on a 24/7 basis.



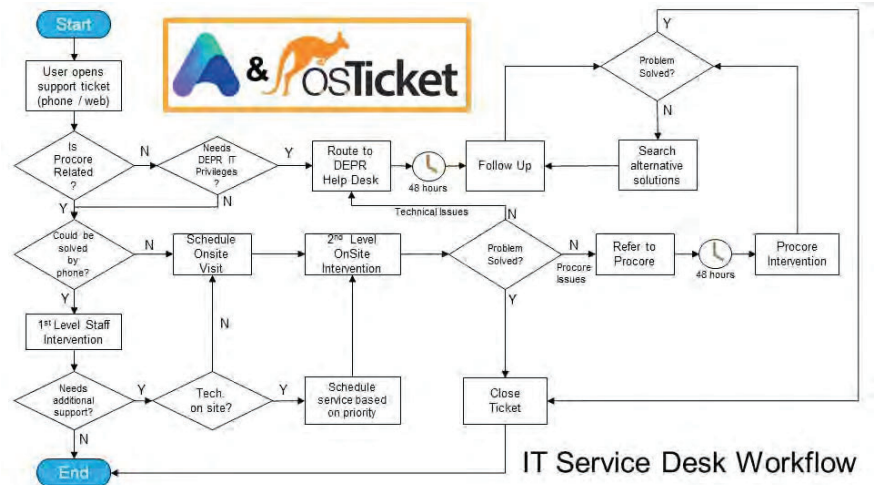
IT Service Management: Acumenian will be providing IT Service Management for PRDE through the IT-as-a-Service (ITaaS) operational model. This business model enables PRDE to maximize their business value by allowing us to create a framework of service delivery that will be performed by our staff to design, plan, deliver, operate and control information technology (IT) services for PRDE-PMO.

IT Support Center: Our help desk provides expertise in managing and optimizing operations. We have provided systems solutions and Help Desks support for thousands of users across the Americas. Knowing that quality and consistency are key to successful help desk operations, we have developed and refined our solutions approach to address the most important issues that affect quality. Our approach consists of improvements to and effective utilization of:





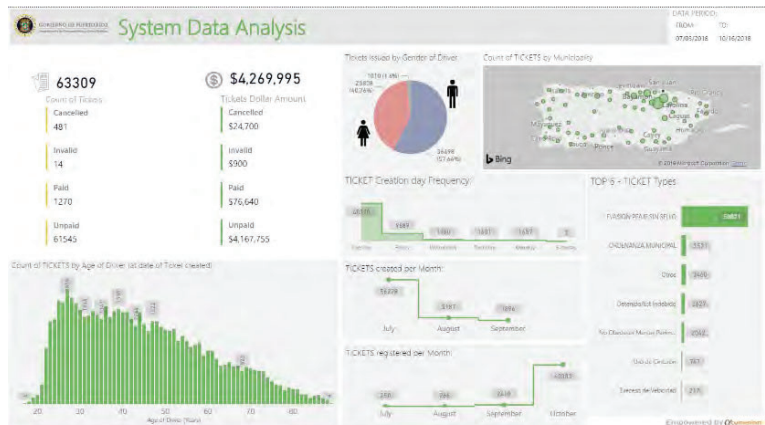
- **Process** - Define, assess, improve, execute and comply
- **Quality Assurance** - Peer reviews, audits, sampling and monitoring
- **Trainings** - Periodic and refresher instructions to remediate non-compliance issues
- **Tools** - Efficiently leverage the capabilities of legacy systems, incorporate monitoring and dashboard solutions.



- **Management** - Monitor and coach staff to optimize customer service.

Data Analytics, Custom Reports and Dashboards: As previously stated, data is an essential part in the operation of a PMO. The way data is managed, monitored and shared is essential for a project success. Moreover, when the structure of the project, or program is more complex due to various project types, different locations, phases, status and/or scope, the way data is presented and made available to team members can be crucial.

Our team of analysts will help to create your data framework, build the strategy, optimize your infrastructure, processes & systems to create a culture of a data-driven organization. With our services we can support our clients with the definition of Key Performance Indicators (KPIs) while enabling data-driven decisions-making with the use of our custom dashboards and Executive Visibility Tools that assure better outcomes. We can design informative reports and intuitive dashboards that can both, inform executives at high level, while providing drill-in options to see detailed status. We will facilitate the proper technology to help monitor and alert key elements.



Acumenian will provide the assesment needed to select the proper web based data gathering tool, (such as PROCORE) and if needed complement with one of our proprietary products, or develop a customized solution that will centralize all the relvant information needed to determine goals and monitoring metrics, in a simple manner. After the implementation of a web based data gathering tool, we will:

- review the data gathering process and adjust if needed
- standardize data in order to expedite data analysis & real time
- discuss and plan preliminary plan for Key Performance indicators
- coordinate additional data to be gathered (for example geolocation for maps)
- design and prepare individual visuals, custom reports and dashboards that aid in the strategic decision making, also known as Executive Visibility Tools (EVTs)
- establish a monitoring process and coordinate periodical data updates





- re-visit and adjust reports as needed

This process, guided with an agile methodology, will provide visibility of program / project status in both, detailed and high level way, as needed. We believe a successful strategy is not just about delivering the correct information, it is about delivering the right information to the right people at the right time. This effort will require services from a Data Leader, Data Validation and a Visualization Expert to assure data is organized and properly analyzed to provide visibility to the leadership team of this program.

8. Billing Dispute Resolution for all Proposed Services

A comprehensive Billing Process will be implemented to ensure that all invoices meet Contract and Client requirements and therefore, through strict compliance with this process, prevent any billing issues. The principal elements of the proposed Billing Process are:

- All employees will be trained on the specific instructions related to recording project charges
- All project charges will be recorded in a software application which provides for:
 - Accounting for time charges according to applicable requirements
 - Generating invoice data, restricted to eligible charges and activities
 - Requiring a one (1) to two (2) sentence justification for all charges
- All project charges must be related to specific goals and achievements

All project invoices shall be discussed with the designated Client representative, and any discrepancies will be resolved prior to formal presentation. In the unlikely event that a significant issue is raised during further invoice processing, a control number will be assigned to each billing issue. A list of any billing issues pending resolution, will be automatically generated monthly and tracked by the appropriate Management level, to ensure that each one is addressed properly and resolved.

If a dispute arises out of or relates to this contract, or the breach thereof, and if the dispute cannot be settled through negotiation, the parties agree first to try in good faith to settle the dispute by mediation administered by the American Arbitration Association. If within 30 days after service of a written demand for mediation, the mediation does not result in settlement of the dispute, then any unresolved controversy or claim arising from or relating to this contract or breach thereof shall be settled by arbitration administered by the American Arbitration Association and judgment on the award rendered by the arbitrator(s) may be entered in any court having jurisdiction thereof.





9. Problem Escalation Process

During the initial stages of the project, the PMO will implement a properly defined, agreed upon escalation matrix with escalation contact point, escalation paths for different escalation areas and levels. Figure 11 presents an example of the escalation matrix that will be discussed and agreed upon with the PRDE. The resulting escalation matrix will be explicitly documented and published amongst the PMO's applicable internal and external stakeholders.

TYPE OF ISSUES	1ST ESCALATION LEVEL	2ND ESCALATION LEVEL	3RD ESCALATION LEVEL	4TH ESCALATION LEVEL
	TEAM LEADER / REGIONAL MANAGER	PROJECT MANAGER	DEPUTY PROGRAM MANAGEMENT	PROGRAM MANAGEMENT
SCHEDULING				
OBTAINING INSTRUCTIONS				
CUSTOMER INFORMATION				
SERVICE INFORMATION				
OBTAINING MATERIALS				
PERFORMANCE ISSUES				
SERVICE CANCELLATIONS				
RESPONSE TIME	1 WEEK	1 WEEK	1 WEEK	1 WEEK

Table 12: Problem Escalation Matrix

The problem escalation process notification will be included as part of the PMO employee/contractor induction process. This action will ensure that the project stakeholders are aware of the escalation process – which issues should be raised to whom, and within which time frame. The PMO will promote a project culture where stakeholders genuinely believe it's acceptable to escalate the issues timely to the next level of management without any fear or aggravating the issue. Managers in need of escalating issues will be instructed to:

- Analyze the situation and obtain verifiable data to correctly characterize the issue before escalating.
- Allow for the other party to respond within the agreed upon period of time. For example, if the Problem Escalation Matrix establishes 3 days to respond to a claim, it is not right to escalate the issue before the agreed upon period is over.
- Avoid frequent and un-necessary escalation. Issues should be resolved at the lowest escalation level possible.
- Escalating issues should be done in a discrete manner. Communication to that effect should be focused to the specific issue and make it only one escalation at a time.
- Escalate only to the right stakeholders and only involve essential team members in the issue.
- Keep the escalation communication (verbal, email, etc.) focused on the issue and do not get personal.





- Escalate by giving background, highlight correct data, severity of the situation (high/medium/low) and suggested solutions.
- Involve two levels up in escalation depending on severity.
- Reach out to peer managers for similar escalation situations to get lessons learned out of past experiences.
- If the first escalation fails, have firmness to escalate it to the next level to make it higher and wider.





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Price Proposal (Mandatory)

Tab 4









Tab 4



Price Proposal (Mandatory)



PROPOSAL SUBMITTAL FORM 2 – SAMPLE PRICE PROPOSAL FORM

PROPOSER IS REQUIRED TO DISCLOSE ANY EXCEPTIONS TO THE SERVICES AND MUST CLEARLY SPECIFY ALL EXCEPTIONS AND LIST THE SEPARATE COSTS IN THE PROPOSER'S PRICING PROPOSAL. ANY PROPOSER THAT FAILS TO SUBMIT PRICE PROPOSAL SHALL BE AUTOMATICALLY DISQUALIFIED FROM CONSIDERATION FOR THE AWARD. IF APPLICABLE, THE PERCENTAGE ESTABLISHED BY RESOLUTION OF THE BOARD FOR THE INVESTMENT IN THE PUERTO RICAN INDUSTRY SHALL BE IDENTIFIED BY PROPOSER IN A SEPARATE COLUMN IN THE PROPOSER'S PRICE PROPOSAL SO THAT THE EVALUATION OF PRICING TO BE CONDUCTED IN ACCORDANCE WITH LAW NO. 10 OF JANUARY 8, 2004 AND LAW 42 OF JANUARY 21, 2018 AS THEY MAY HAVE BEEN AMENDED. THESE LAWS SHALL BE APPLIED IF PERMITTED UNDER APPLICABLE FEDERAL AND LOCAL LAWS.

Other Funding Sources Specialist	6,240	\$145
Insurance Settlements Specialist	6,240	\$145
Admin Staff	6,240	\$65
Compliance Manager	6,240	\$205
Project Controls Specialist	6,240	\$185
Reporting Specialist	31,200	\$95
Insurance Specialist	6,240	\$145
Admin Staff	6,240	\$65
Procurement Manager	6,240	\$185
Procurement Support Specialists	30,160	\$85
Admin Staff	5,200	\$65
Community Outreach Manager	6,240	\$155
Communications Specialist	6,240	\$115
Content Support	5,720	\$125
Field Staff	156,520	\$85
PMO Line - Oversight Office		
Senior Project Manager	6,240	\$205
Design Oversight Manager	6,240	\$185
Design Oversight Staff	36,400	\$155
Construction Oversight Manager	6,240	\$185
Construction Oversight Staff	36,400	\$155
QA/QC Manager	6,240	\$175
QA/QC Staff	37,440	\$125
Safety Manager	6,240	\$155
Safety Inspectors	30,160	\$85
Admin Staff	6,240	\$65

ITEMS	No. Hrs	Hr Rate
PMO Direction		
Program Manager	6,240	\$245
Deputy Program Manager	6,240	\$220
PMO Support Staff		
Risk Manager	6,240	\$205
Administration Manager	6,240	\$185
Finance & Accounting	12,480	\$115
Human Resources	6,240	\$105
Admin Assistant	6,240	\$65
Information Technology Manager	6,240	\$155
Grants Manager	6,240	\$185
FEMA Specialist	6,240	\$145
HUD Specialist	6,240	\$145
Other Funding Sources Specialist	6,240	\$145
Insurance Settlements Specialist	6,240	\$145
Admin Staff	6,240	\$65
Compliance Manager	6,240	\$205
Project Controls Specialist	6,240	\$185
Reporting Specialist	31,200	\$95
Insurance Specialist	6,240	\$145
Admin Staff	6,240	\$65
Procurement Manager	6,240	\$185
Procurement Support Specialists	30,160	\$85
Admin Staff	5,200	\$65
Community Outreach Manager	6,240	\$155
Communications Specialist	6,240	\$115
Content Support	5,720	\$125
Field Staff	156,520	\$85

PMO Line - Oversight Office		
Senior Project Manager	6,240	\$205
Design Oversight Manager	6,240	\$185
Design Oversight Staff	36,400	\$155
Construction Oversight Manager	6,240	\$185
Construction Oversight Staff	36,400	\$155
QA/QC Manager	6,240	\$175
QA/QC Staff	37,440	\$125
Safety Manager	6,240	\$155
Safety Inspectors	30,160	\$85
Admin Staff	6,240	\$65

PMO Line - Regional Offices		
Regional Managers	43,680	\$145
Regional Project Managers	36,400	\$130
Regional Pre-Construction Manage	36,400	\$140
Regional Design Oversight Mgrs	36,400	\$140
Regional Construction Oversight M	29,120	\$140
Senior Architect / Engineers	131,040	\$130
Schedulers	29,120	\$115
Architects / Scientists / Engineers	145,600	\$115
Construction Coordinator	116,480	\$115
Junior Architect / Engineers	182,000	\$95
Land Acquisition Manager	4,160	\$125
Land Acquisition Technicians	12,480	\$100
Drafters	48,880	\$85
Admin Assistants	36,400	\$65

PMO Line - Regional Offices		
Regional Managers		
Regional Project Managers	36,400	\$130
Regional Pre-Construction Manage	36,400	\$140
Regional Design Oversight Mgrs	36,400	\$140
Regional Construction Oversight M	29,120	\$140
Senior Architect / Engineers	131,040	\$130
Schedulers	29,120	\$115
Architects / Scientists / Engineers	145,600	\$115
Construction Coordinator	116,480	\$115
Junior Architect / Engineers	182,000	\$95
Land Acquisition Manager	4,160	\$125
Land Acquisition Technicians	12,480	\$100
Drafters	48,880	\$85
Admin Assistants	36,400	\$65

PMO - SME Consultants		
10%		
KGT - Programmatic Audits	7,800	\$193
ETI - Demographic & Econ Projections	8,400	\$165
PMA - Contract Review & Legal Support	9,400	\$248
FNI - Stds Development & Design Rev	13,200	\$248
KA - Grant Mgmt & Compliance	9,400	\$248
ACUMENIAN		
Director	5,720	\$138
Managers & Leaders	17,680	\$127
Data Analysts, Consult & Programme	16,640	\$116
Technicians & Coordinators	38,480	\$94
Tech Support Specialists Call Ctr	23,920	\$72

Number of Hours for PMO Based on:

- o a 10-yr CIP for 856 schools currently in use
- o CIP Prog of 85 schools per yr, at Avg CIP of \$15M per school
- o Yearly CIP of \$1.25 Bn per yr

3-yr "Not to Exceed" Amt w/o taxes+EngStampFees \$187,523,000

4% B2B Subconsultants Tax \$842,424

1.5% Engineering Stamp Certification Fee \$1,435,122

3 yrs "Not to Exceed" Amt w/ B2B+EngStampFees \$189,800,546





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DEPARTMENT OF EDUCATION

Non-Collusion Affidavit (Mandatory)

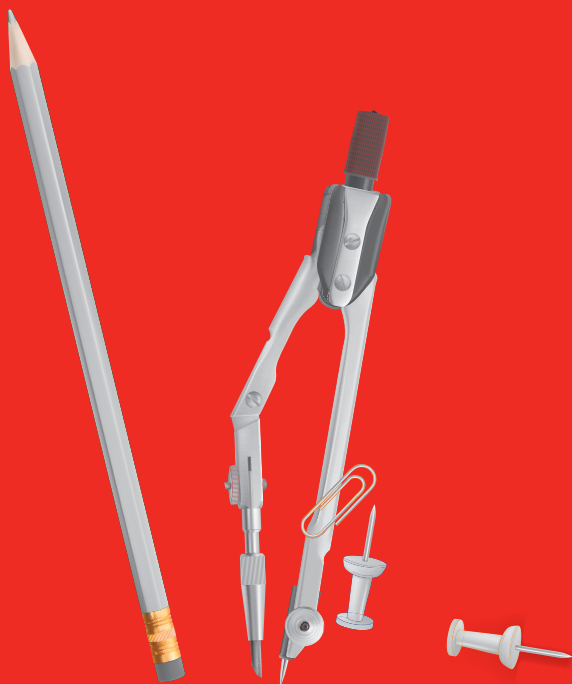
Tab 5







Tab 5



Non-Collusion Affidavit (Mandatory)

PROPOSAL SUBMITTAL FORM 3 - NON-COLLUSION AFFIDAVIT

EACH PROPOSER IS REQUIRED TO SUBMIT A NON-COLLUSION AFFIDAVIT WITH ITS PROPOSAL. ANY PROPOSER THAT FAILS TO SUBMIT A NON-COLLUSION AFFIDAVIT SHALL BE AUTOMATICALLY DISQUALIFIED FROM CONSIDERATION FOR AN AWARD.

I, the undersigned, am the Representative of CMA - CPM - CSA Joint Venture (the "Proposer"), and being duly sworn, declare that the proposal submitted by the Proposer in response to **PRDE (ER)- 2019-02** is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the proposal is genuine and not collusive or sham; that the proposer has not directly or indirectly induced or solicited any other proposer to put in a false or sham proposal, and has not directly or indirectly colluded, conspired, connived, or agreed with any proposer or anyone else to put in a sham proposal; that the proposer has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the proposal price of the proposer or any other proposer, or to fix any overhead, profit, or cost element of the proposal price, or of that of any other proposer, or to secure any advantage against the Government of Puerto Rico or the Puerto Rico Department of Education; that all statements contained in the proposal are true; and, further, that the Proposer has not, directly or indirectly, submitted its proposal price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company association, organization, proposal depository, or to any member or agent thereof to effectuate a collusive or sham proposal.

I certify (or declare) under penalty of perjury under the laws of Puerto Rico that the foregoing is true and correct.

NAME OF PROPOSER: CMA - CPM - CSA Joint Venture
Signature: [Signature]
Name: Title: Héctor J. Rivera Rodríguez, JV Representative
Date: April 8, 2019

NOTARY PUBLIC SEAL

Sworn to and subscribed before me on this 8th day of April, 2019, proved to me on the basis of satisfactory evident to be the person who appeared before me and signed this Affidavit.



[Signature]
RUA 17,812





DE

PUERTO RICO
DEPARTMENT OF EDUCATION

Proposal (Bid) Bond (Mandatory)

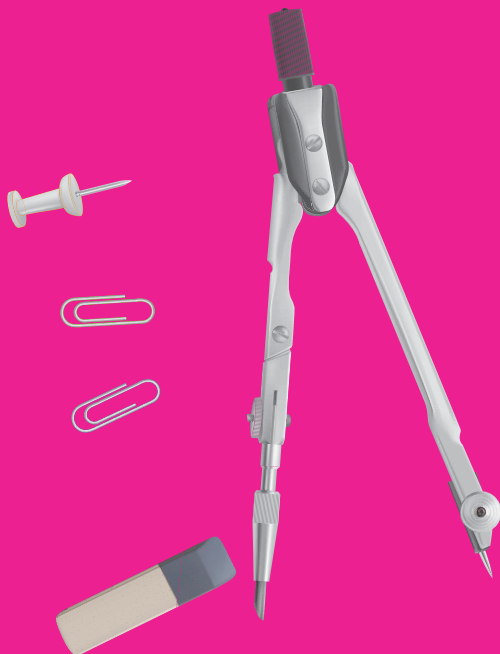
Tab 6







Tab 6



Proposal (Bid) Bond (Mandatory)



United Surety & Indemnity Co.
PO Box 2111
San Juan, PR 00922-2111
t. 787.273.1818
f. 787.625.0893

BID BOND

BOND NO. 19203584-1

KNOW ALL MEN BY THESE PRESENTS, that we **CMA-CPM-CSA JV** as Principal, and the **UNITED SURETY & INDEMNITY COMPANY**, an insurance company duly organized and existing under the laws of the Commonwealth of Puerto Rico, having its principal place of business at Guaynabo, Puerto Rico, as surety, are held and firmly bound unto **GOBERNMENT OF PUERTO RICO/ DEPARTMENT OF EDUCATION** as Obligee, in the penal sum of **TWO HUNDRED FIFTY THOUSAND (\$250,000.00)** dollars, lawful money of the United States of America, for the payment of which, well and truly to be made, we bind ourselves, our heirs executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

WHEREAS, the said Principal is herewith submitting a proposal **"PROGRAM MANAGEMENT SERVICES, RFP PRDE (ER) 2019-02. EL PAYMENT BOND REQUERIDO NO ESTA APROBADO."**

THE CONDITION OF THE ABOVE OBLIGATIONS IS SUCH, that if the aforesaid Principal is awarded the contract, the Principal shall, within the period specified therein, or if no period is specified, within ten (10) days after the notice of such award, enter into a contract, then this obligation shall be null and void and of no effect; otherwise the Principal and the Surety will pay the Obligee the difference in money between the amount of the bid of the Principal and the amount for which the Obligee legally contract with a third party to perform the work if such amount is in excess of the amount of the bid of the Principal. In no event shall the liability hereunder exceed the penal sum hereof.

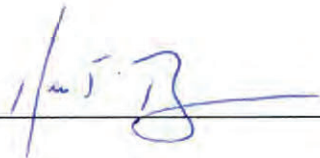
This bond is valid for 90 days from the date it is issued or the term specified in the Bid documents whichever is less.

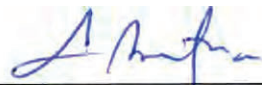
Any suits or proceedings in equity brought or to be brought against the Surety shall be initiated within ninety (90) days after the acceptance of the Principal's bid.

SIGNED and SEALED this April 17, 2019.

CMA-CPM-CSA JV

UNITED SURETY & INDEMNITY COMPANY

By: 

By: 
LOURDES SANTANA LOPEZ
Attorney in Fact

MANDATORY PREMIUM AND COVERAGE CONDITIONS RIDER-PUERTO RICO

It is hereby understood and agreed that pursuant to the regulations approved by the Commissioner of Insurance of Puerto Rico, this bond is amended according to the following conditions and stipulations:

1. **Bond Premium Paid in Full by You:** If the premium for this bond is to be paid by you in its entirety, surety coverage will be afforded only if the total premium is paid in full to, and received by, us or our authorized representative on or before the effective date shown in the bond. Otherwise, the bond will be effective on the date the total premium is paid in full to, and received by, us or our authorized representative, and we will proceed as indicated on Section 4 of this rider.
2. **Rider Premium:** Riders issued after the inception date of this bond, affording additional coverage and which result in an additional premium, shall not be effective until the total additional premium due thereon is paid in full to, and received by, us or our authorized representation.
3. **Premium Corrections:** Any additional premium due resulting from changes in rates, classifications, premium bases, or any other adjustments (as determined by us or the proper rating organization), shall be paid full within thirty (30) days from the date of billing of the corrective rider.
4. **Late Payments:** If payment is received after the specified due date, we will proceed as follows:
 - a. For new bonds (Section 1 above) we will issue a Change of Effective Date of Coverage Notice stating:
 - (1) that the coverage afforded under the bond is effective as of the date of receipt of the applicable premium payment,
 - (2) the resulting amended inception and expiration dates of the bond, which will be postponed by the same number of days that coverage was not afforded due to the late receipt of the premium payment, and
 - (3) the corresponding period of time during which coverage is not afforded under the bond.
 - b. For premium corrections riders (Section 3 above) we will issue, subject to the applicable regulations, a limited Reinstatement Notice stating:
 - (1) that the coverage afforded by the bond will be reinstated as of the date of receipt of the applicable additional premium payment,
 - (2) the period for which coverage is not afforded, and
 - (3) the amount of premium return due to you, if any.
5. **Cancellation of Bond:** With reference to renewal of bonds, such bonds will not be effective if the corresponding premium has not been received by us or our authorized representative on the date established in the Cancellation Notice, which will be issued in compliance with the terms of the bond.
6. **Definition of Authorized Representative:** Authorized representative for the purpose of this rider means a General Agent, an Attorney in Fact, or a person duly authorized in writing by us for premium collection purposes.
7. This mandatory rider supersedes any other conditions to this effect in the bond to which it is attached.



UNITED SURETY & INDEMNITY COMPANY

A Commitment to Excellence and Integrity

CERTIFICATE OF APPOINTMENT OF ATTORNEY-IN-FACT

Know All Men by these Presents, that UNITED SURETY & INDEMNITY COMPANY, a corporation duly organized and existing under the laws of the Commonwealth of Puerto Rico, and having its principal office in the City of Guaynabo, Puerto Rico, does hereby certify that it has made, constituted and appointed LOURDES SANTANA LOPEZ, of Bayamón, Puerto Rico, its true and lawful Attorney-in-Fact with full power and authority conferred to sign, seal and execute in its behalf bonds, undertakings and other obligatory instruments of similar nature as follows:

WITHOUT LIMITATION

and to bind UNITED SURETY & INDEMNITY COMPANY thereby as fully and to the same extent as if such instruments were signed by an officer of UNITED SURETY & INDEMNITY COMPANY and all the acts of said Attorney, pursuant to the authority given by virtue of Deed Number Eighteen (18), executed on the 10th of October, 2008; before Notary Public Johanny Martínez Batista, are hereby ratified and confirmed.

The Power of Attorney granted by the above mentioned deed, was made and executed pursuant to and by authority of the By-Laws duly adopted by the Stockholders of the Company. Certified copy of the above mentioned Deed shall be filed at the Office of the Commissioner of Insurance of Puerto Rico.

In Witness Whereof, UNITED SURETY & INDEMNITY COMPANY has, pursuant to its By-Laws, caused the present certificate to be signed by the Secretary and its corporate seal to be hereto affixed this 31st of March, 2011.

UNITED SURETY & INDEMNITY COMPANY

By:

Rafael A. Blanes González, Secretary



Affidavit Number: 0185

and subscribed before me by Rafael A. Blanes González, of legal age, married, executive and resident of Guaynabo, Puerto Rico, to me personally known.

In Guaynabo, Puerto Rico, this 31st day of March, 2011.

Johanny Martínez Batista
Notary

The present certificate is in full force and effect as of this 17TH day of APRIL, 2019.

Rafael A. Blanes González
Secretary



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PUERTO RICO
DEPARTMENT OF EDUCATION

Proposer Questionnaire

Tab 7







Tab 7

Proposer Questionnaire



THIS CERTIFIES THAT

CPM PR, LLC



* Nationally certified by the: **PUERTO RICO MINORITY SUPPLIER DEVELOPMENT COUNCIL**

*NAICS Code(s) : 541611; 541330; 237110; 236220; 236210

* Description of their product/services as defined by the North American Industry Classification System (NAICS)

12/21/2018

Issued Date

PR01189

Certificate Number

12/31/2019

Expiration Date

Adrienne C. Trimble
Adrienne Trimble

Jacqueline Marie Matos

Jacqueline Marie Matos

By using your password (NMSDC issued only), authorized users may log into NMSDC Central to view the entire profile: <http://nmsdc.org>

[Certify, Develop, Connect, Advocate.](#)

* MBEs certified by an Affiliate of the National Minority Supplier Development Council, Inc.®

THIS CERTIFIES THAT

CMA Architects & Engineers LLC



* Nationally certified by the: **PUERTO RICO MINORITY SUPPLIER DEVELOPMENT COUNCIL**

*NAICS Code(s): 541330; 541310

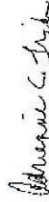
* Description of their product/services as defined by the North American Industry Classification System (NAICS)


03/27/2019

Issued Date

PR01260

Certificate Number


Adrienne Trimble



Expiration Date

Jacqueline Marie Matos

03/31/2020

By using your password (NMSDC issued only), authorized users may log into NMSDC Central to view the entire profile: <http://nmsdc.org>

[Certify, Develop, Connect, Advocate.](#)

* MBEs certified by an Affiliate of the National Minority Supplier Development Council, Inc.®

THIS CERTIFIES THAT

CSA Architects & Engineers LLP



* Nationally certified by the: **PUERTO RICO MINORITY SUPPLIER DEVELOPMENT COUNCIL**

*NAICS Code(s): 541310; 541330; 541611; 541620; 541618; 541340; 541360; 562910

* Description of their product/services as defined by the North American Industry Classification System (NAICS)

11/27/2018

Issued Date

PR01075

Certificate Number

Adrienne C. Trimble
Adrienne Trimble

Jacqueline Marie Matos

Expiration Date

Jacqueline Marie Matos

12/31/2019

By using your password (NMSDC issued only), authorized users may log into NMSDC Central to view the entire profile: <http://nmsdc.org>

[Certify](#), [Develop](#), [Connect](#), [Advocate](#).

* MBEs certified by an Affiliate of the National Minority Supplier Development Council, Inc.®



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Proposer References

Tab 8





ELEANOR RO

Cameras in operation
No Trespassing No Parking



Tab 8



Proposer References

PROPOSAL SUBMITTAL FORM 5: PROPOSER REFERENCES (3 Required)

Proposer is required to provide a minimum of three (3) customer references for similar scope and magnitude of work that Proposer has performed within the past three (3) years. Please include only references for services that are similar enough to demonstrate Proposer's ability to perform the services requested in the above-referenced RFP.

CLIENT REFERENCE NO. 1

CLIENT NAME: ADDRESS:	<u>Puerto Rico Infrastructure Financing Authority (PRIFA)</u> <u>Mailing Address: PO Box 41207 San Juan, PR 00940-1207</u>
CONTACT NAME/TITLE:	<u>José E. Basora, Director of Engineering</u>
CONTACT EMAIL: SERVICE DATES:	<u>jose.basora@afi.pr.gov</u>
CONTACT PHONE:	<u>Office: (787) 763-5757 ext. 15919 Mobile: (787) 234-0114</u>
SERVICE DATES:	<u>June 2010 - March 2013</u>
DESCRIPTION OF WORK PERFORMED /PERFORMING:	<u>21st Century Schools Modernization Program - Performed Schools</u> <u>Field Assessment, Permitting & Procurement, LEED Certification Support,</u> <u>Design Management, Program Management, Document Control Platform</u>
CONTRACT AMOUNT (\$):	<u>\$19.2 million</u>

CLIENT REFERENCE NO. 2

CLIENT NAME: ADDRESS:	<u>Puerto Rico Aqueduct and Sewer Authority</u> <u>Mailing Address: PO Box 7066 San Juan, PR 00916-7066</u>
CONTACT NAME/TITLE:	<u>José Javier Rivera / Executive Director of Infraestructre</u>
CONTACT EMAIL: SERVICE DATES:	<u>jose.rivera3@acueductospr.com</u>
CONTACT PHONE:	<u>(787) 999-1717</u>
SERVICE DATES:	<u>2005 - 2009</u>
DESCRIPTION OF WORK PERFORMED /PERFORMING:	<u>North Region Capital Improvement Program - \$238 MM capital investment</u> <u>In a joint venture, CPM was responsible for managing the procurement and construction</u> <u>efforts for this Program, comprising 19 municipalities. Water projects included all</u> <u>segments of the water cycle: rehabilitation and construction of raw water facilities, water</u> <u>treatment plants, water storage tanks, distribution pump stations and distribution lines,</u> <u>including the replacement of client's service line and water meters, among others.</u>
CONTRACT AMOUNT (\$):	<u>\$60.1 million contract amount</u>



CLIENT REFERENCE NO. 3

CLIENT NAME: ADDRESS:	<u>Puerto Rico Infrastructure Financing Authority (PRIFA)</u> <u>Mailing Address: PO Box 41207 San Juan, PR 00940-1207</u>
CONTACT NAME/TITLE:	<u>José E. Basora, Director of Engineering</u>
CONTACT EMAIL: SERVICE DATES:	<u>jose.basora@afi.pr.gov</u>
CONTACT PHONE:	<u>Office: (787) 763-5757 ext. 15919 Mobile: (787) 234-0114</u>
SERVICE DATES:	<u>2007 - 2010</u>
DESCRIPTION OF WORK PERFORMED /PERFORMING:	<u>2010 Central American & Caribbean Games, Mayagüez, Puerto Rico</u> <u>Program Management, Design Management, Permitting, Scheduling, Land Acquisition &</u> <u>Relocation Assistance, Estimating, Bid Process Management, Construction Management</u>
CONTRACT AMOUNT (\$):	<u>\$12.7 million</u>



PROPOSAL SUBMITTAL FORM 5: PROPOSER REFERENCES (3 Required)

Proposer is required to provide a minimum of three (3) customer references for similar scope and magnitude of work that Proposer has performed within the past three (3) years. Please include only references for services that are similar enough to demonstrate Proposer's ability to perform the services requested in the above-referenced RFP.

CLIENT REFERENCE NO. 1

CLIENT NAME: ADDRESS:	<u>Puerto Rico Federal Highway Administration / EFLHD</u>
CONTACT NAME/TITLE:	<u>Daniel Camacho</u>
CONTACT EMAIL: SERVICE DATES:	<u>Daniel.Camacho@dot.gov</u>
CONTACT PHONE:	<u>703-404-6201</u>
SERVICE DATES: 2012-2016	
DESCRIPTION OF WORK PERFORMED /PERFORMING:	<u>Caparra Intersection System Improvements Project. CMA worked in the preliminary stages of the design and provided support for the preparation of the grant proposal. The Project includes improvements to the PR-165 / PR-2 / PR-23 / Fort Buchanan intersection and traffic signal system, addition of auxiliary lanes, pavement rehabilitation, reconstruction of sidewalks, improvements to pedestrian crossings, relocation of Metropolitan Bus Authority bus stop, and Maintenance of Traffic. CMA also provided construction supervision and prepared the Base Condition Report for the stipulated Measurements of Effectiveness, including motorized and non-motorized traffic volume, travel time and delay, and safety</u>
CONTRACT AMOUNT (\$):	<u>\$1.0MM (engineering fees) - \$19 MM (project value)</u>

CLIENT REFERENCE NO. 2

CLIENT NAME: ADDRESS:	<u>Puerto Rico Aqueducts & Sewer Authority</u>
CONTACT NAME/TITLE:	<u>Jose Javier Rivera</u>
CONTACT EMAIL: SERVICE DATES:	<u>Jose.Rivera3@aqueductospr.com</u>
CONTACT PHONE:	<u>787-999-1717</u>
SERVICE DATES:	<u>2005-2015</u>
DESCRIPTION OF WORK PERFORMED /PERFORMING:	<u>CMA was contracted by Black & Veatch and CDM to collaborate in joint efforts as Pre-construction Managers for the South and West PRASA Regions during the Capital Improvement Program (CIP) that ended in 2015. During this period, CMA worked with more than 100 projects in the Planning, Land Acquisitions, Permitting, Design Development Review, Funding Allocation and Bid Support phases. More than 25 full-time engineers and other technical personnel were involved in the management of the CIP project.</u>
CONTRACT AMOUNT (\$):	<u>\$15MM (engineering fees) - \$500 MM (project value)</u>

PROPOSAL SUBMITTAL FORM 5: PROPOSER REFERENCES (3 Required)

Proposer is required to provide a minimum of three (3) customer references for similar scope and magnitude of work that Proposer has performed within the past three (3) years. Please include only references for services that are similar enough to demonstrate Proposer's ability to perform the services requested in the above-referenced RFP.

CLIENT REFERENCE NO. 1

CLIENT NAME: ADDRESS:	<u>Hill International/ One Penn Plaza, Suite 3415, New York, NY, 10119</u>
CONTACT NAME/TITLE:	<u>Salim Short /Program Manager of Inspections - NYCHRO</u>
CONTACT EMAIL: SERVICE DATES:	<u>salimshort@hillintl.com/ 2018-2019</u>
CONTACT PHONE:	<u>201-572-1662</u>
SERVICE DATES:	<u>2018-2019</u>
DESCRIPTION OF WORK PERFORMED /PERFORMING:	<u>The CSA Group provided Special Inspection Services and Program Inspection Services on the HRO Build it Back</u>
CONTRACT AMOUNT (\$):	<u>\$5,000,000</u>

CLIENT REFERENCE NO. 2

CLIENT NAME: ADDRESS:	<u>New York City Housing Authority</u>
CONTACT NAME/TITLE:	<u>Michael Moore/Director – NYCHA Office of Recovery and Resilience</u>
CONTACT EMAIL: SERVICE DATES:	<u>michele.moore@nycha.nyc.gov</u>
CONTACT PHONE:	<u>212.306.8563</u>
SERVICE DATES:	<u>March 2014 through July 2022 (expected)</u>
DESCRIPTION OF WORK PERFORMED /PERFORMING:	<u>Program Management Services</u>
CONTRACT AMOUNT (\$):	<u>Current Assigned \$36M - Expected Total \$48M</u>

CLIENT REFERENCE NO. 3

CLIENT NAME: ADDRESS:	Puerto Rico Federal Affairs Department
CONTACT NAME/TITLE:	Annie Mayol
CONTACT EMAIL: SERVICE DATES:	annie.mayol@foundationpr.org
CONTACT PHONE:	787-420-9656
SERVICE DATES:	January 2009 - June 2012
DESCRIPTION OF WORK PERFORMED /PERFORMING:	Program Management, Engineering Consultancy, Owner's Representation, Community Outreach, Training
CONTRACT AMOUNT (\$):	\$31 Million



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Designation of Subcontractors

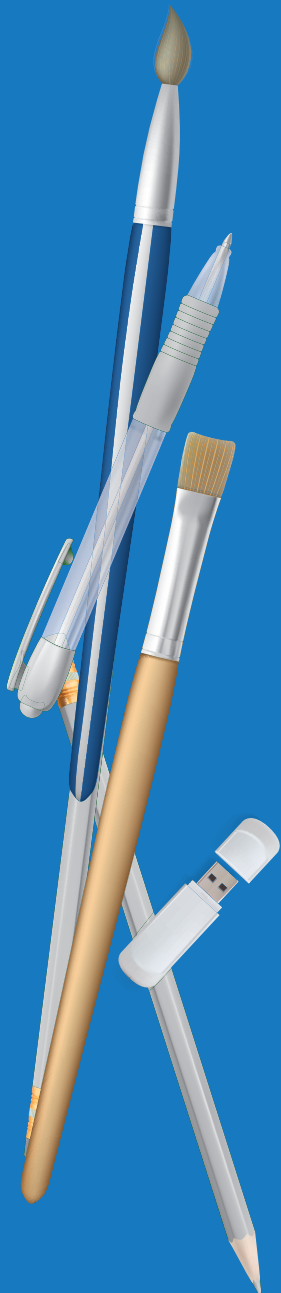
Tab 9







Tab 9



Designation of Subcontractors

PROPOSAL SUBMITTAL FORM 6: DESIGNATION OF SUBCONTRACTORS

PROPOSER NAME:

SUBCONTRACTOR NO. 1:

Proposed Subcontractor Services: Grants Management
Percentage (%) of Total Work: 10%
Subcontractor Name: Kinne Associates, LLC
Address: 7777 Davie Road Extension Suite 302A-3 Hollywood, FL 33024
Contact Person/Title: Richard Kinne / President
Phone: Office: (954) 391-6701 Mobile: (954) 439-6227
Email Address: richard@kinne.com

SUBCONTRACTOR NO. 2:

Proposed Subcontractor Services: Information Technology (IT) Services
Percentage (%) of Total Work: 5%
Subcontractor Name: Acumenian, LLC
Address: Corporate Office Park CPM Plaza 44 Road 20 Suite 201
Phone: (787) 999-4000 Guaynabo, PR 00966-3326
Contact Person/Title: Luis Matos / Vice President
Phone: (939) 717-6838
Email Address: lmatos@acumenian.com

SUBCONTRACTOR NO. 3

Proposed Subcontractor Services: Technical Advisory and Educational Trends
Percentage (%) of Total Work: 5%
Subcontractor Name: Fielding Nair International
Address: 259 Water Street, Suite 1L, Warren, RI 02885
Contact Person/Title: Jay J. Litman, AIA / Partner & RI Studio Principal
Phone: Office: +1.401.289-2789 Mobile: +1.401.474.0780
Email Address: jay@fieldingnair.com

ADD ADDITIONAL PAGES IF NEED



PROPOSAL SUBMITTAL FORM 6: DESIGNATION OF SUBCONTRACTORS

PROPOSER NAME:

SUBCONTRACTOR NO. 1:

Proposed Subcontractor Services: Social & Economic Data & Projections
Percentage (%) of Total Work: 5%
Subcontractor Name: Estudios Técnicos Inc.
Address: Domenech 113 Hato Rey, PR 00918
Contact Person/Title: Graham Castillo/President
Phone: (787) 751-1675
Email Address: gcastillo@estudios tecnicos.com

SUBCONTRACTOR NO. 2:

Proposed Subcontractor Services: Compliance Audits
Percentage (%) of Total Work: 5%
Subcontractor Name: Kevane Grant Thornton LLP
Address: 33 Bolivia Street Suite 400, San Juan, PR 00917-2013
Phone: (787) 754 1915
Contact Person/Title: Ojel Rodriguez/Partner
Phone: (787) 754 1915
Email Address: ojel.rodriguez@pr.gt.com

SUBCONTRACTOR NO. 3

Proposed Subcontractor Services: Legal
Percentage (%) of Total Work: 5%
Subcontractor Name: Pietrantonio Mendez & Alvarez LLC
Address: Popular Center 19th Floor, 208 Ponce de León, San Juan, 00918
Contact Person/Title: Edwin Cruz/Member
Phone: (787) 274-1212
Email Address: ecruz@pmaalaw.com

ADD ADDITIONAL PAGES IF NEED



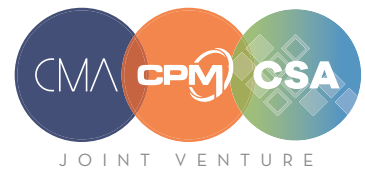


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Certificate of Insurance Coverage

Tab 10



JOINT VENTURE



C Dd Ee Ff Gg Hh Ii Jj Kk Ll Mm Nn Oo Pp Qq Rr Ss Tt Uu Vv Ww Xx Yy Zz

Desarrolla tus habilidades
Resolvamos nuestros problemas
Valor del mes

Septiembre	Unidad 11: Amigos y familia
Octubre	Unidad 5: El día de la familia
Noviembre	Unidad 7: El día de las fiestas
Diciembre	Unidad 9: El día de las fiestas

El día de la familia

