

# Del Terra's Timeline at BUSD

Contracts

Invoices

Personnel

2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
<b>2009</b>			<b>2012</b>			<b>2016</b>			<b>2017</b>			<b>2020</b>
<p><b>Sep. 1-</b> 2009 Agreement. Program Management Agreement Bassett USD and Del Terra. Effective through June 30, 2010</p> <p><b>Oct. 14-</b> Board ratifies Agreement for \$401,595 plus reimbursables of up to \$10,000</p>			<p>No Notable Events</p>			<p><b>Jun. 1-</b> Extra Services for Facilities report HVAC Assessment, Facility Report, District Roofing Assessment and DSA Close Out</p>			<p>No Notable Events</p>			<p>No Notable Events</p>
<b>2010</b>			<b>2013</b>			<b>2014</b>			<b>2018</b>			<b>2021</b>
<p><b>Jul. 1-</b> Professional Services Agreement from July 1, 2010 through December 31, 2013</p> <p><b>Jul. 22-</b> 2010 Program Management Agreement (*no close out*) \$320,000</p>			<p><b>Feb. 8-</b> 2013 Amendment to 2010 Agreement</p>			<p><b>Sep. 15-</b> Extra Services Inv 36382 21st Century TK-5 Project Reprogramming &amp; Replanning/ Tech</p>			<p><b>Apr. 21-</b> Del Terra declares that the 2015 Agreement had expired</p>			<p><b>Feb. 24-</b> DSA stop work order BHS, Edgewood, Sunkist and Van Wig</p>
<b>2011</b>			<b>2014</b>			<b>2015</b>			<b>2019</b>			<b>2020</b>
<p>No Notable Events</p>			<p><b>Apr. 1-</b> 2014 Amendment to 2009 Agreement; Effective 4/1/14 expires 3/31/15</p> <p><b>Aug. 5-</b> Board approves Fourth Amendment to 2010 Construction Management Agreement</p>			<p><b>Mar. 31-</b> 2014 Amendment expires</p> <p><b>Apr. 21-</b> Board approves Program and Construction Management Agreement</p>			<p><b>Jun. 18 -</b> Proposed Amendment to 2015 Agreement</p> <p><b>Jul. 29-</b> 2019 Agreement with Close Out included</p> <p><b>Sep. 24 –</b> Extra Services for BHS Adult School Modernization and Prop 39 Climate Energy Efficiency</p>			<p><b>Mar. 2-</b> DSA follow up letter</p> <p><b>Mar. 19-</b> Contract with SGH to close out</p> <p><b>Apr. 17-</b> Del Terra termination letter issued</p>
<b>2011</b>			<b>2015</b>			<b>2016</b>			<b>2017</b>			<b>2019</b>
<p><b>Aug. 11-</b> Inv 36220-11 Retention paid on 2009 Agreement</p>			<p><b>Apr. 29-</b> Inv. 36370-01 for PM and CM Services sent to District for \$400,000</p>			<p><b>Jun. 1-</b> Extra Services Invoices 36270-01, 362230-01, 362240-1, 36201-1 for various projects</p>			<p><b>Jun. 2-</b> Last Inv 36381-06 21<sup>st</sup> Century Schools TK-5 CM retention payment</p>			<p><b>Feb. 5-</b> Inv 36500-03 Retention/Final payment on Florence Flanner Modernization</p>
<b>2014</b>			<b>2015</b>			<b>2016</b>			<b>2018</b>			<b>2020</b>
<p><b>May 1-</b> Inv 36240-16 Rev. Retention paid on 2013 Amendment</p>			<p><b>May 1-</b> Inv. 36245-13 Final Payment for 2013 Agreement for Close Out</p>			<p><b>Jun. 8-</b> First invoice 36381-1 21<sup>st</sup> Century Schools TK-5 CM</p>			<p><b>May 3-</b> Retention Payment for 2015 Agreement. Invoice 36250R</p>			<p><b>May 21-</b> Invoice 36511 for close out under 2019 Agreement</p>
<b>2011</b>			<b>2015</b>			<b>2016</b>			<b>2017</b>			<b>2019</b>
<p><b>Nov. 4-</b> Invoice 36360-02 Final Payment on Demonstration Classrooms</p>			<p><b>Sep. 1-</b> Only invoice for 21st Century Classrooms 6-12 Project inv 36380-01</p>			<p><b>Sep. 15-</b> Extra Services Invoice 36382 21<sup>st</sup> Century TK-5 Reprogramming/Replanning</p> <p><b>Oct. 6-</b> Last substantive Invoice 36381-05 21st Century Schools TK-5 CM Project (paid 11/9/16)</p>			<p><b>May 3-</b> Retention Payment for 2015 Agreement. Invoice 36250R</p>			<p><b>May 21-</b> Invoice 36511 for close out under 2019 Agreement</p>
<b>2013</b>			<b>2014</b>			<b>2015</b>			<b>2016</b>			<b>2017</b>
<p><b>Jul. 18, 2013-</b> Reynoso appointed as Superintendent</p>			<p><b>Mar. 21, 2014-</b> Rojas hired as Deputy Superintendent</p>			<p><b>Nov. 4, 2014-</b> The voters in Bassett Unified School District area pass Measure V with a 64.2% vote</p>			<p><b>May 24, 2017-</b> Alejandro Rojas resigns as Superintendent, French appointed as Superintendent</p>			<p><b>Jan. 2019-</b> Bermudez Promoted to Executive Director of Business Services</p>
<b>2014</b>			<b>2015</b>			<b>2016</b>			<b>2017</b>			<b>2018</b>
<p><b>May 22, 2014-</b> Superintendent Reynoso takes medical leave, Alejandro Rojas appointed Acting Superintendent</p>			<p><b>Aug. 2015-</b> Debra French hired as Assistant Superintendent of Human Resources</p>			<p><b>Aug. 2016-</b> Linda Bermudez hired as Director of Policy Compliance and Partnerships</p>			<p><b>Jan. 2019-</b> Bermudez Promoted to Executive Director of Business Services</p>			<p><b>Feb. 2020-</b> Bermudez announces medical leave</p>
<b>2014</b>			<b>2015</b>			<b>2016</b>			<b>2017</b>			<b>2018</b>
<p><b>Oct. 2014-</b> Board appoints Rojas as Superintendent for the District</p>			<p><b>Sep. 2016-</b> Debra French appointed as Assistant Superintendent</p>			<p><b>Sep. 2016-</b> Debra French appointed as Assistant Superintendent</p>			<p><b>Feb. 2020-</b> Bermudez announces medical leave</p>			<p><b>Jun. 2021-</b> Bermudez terminated from BUSD</p>
<b>2017</b>			<b>2018</b>			<b>2019</b>			<b>2020</b>			<b>2021</b>
<p><b>May 2017-</b> French appointed as Superintendent until June 30, 2020</p>			<p><b>Aug. 2016-</b> Linda Bermudez hired as Director of Policy Compliance and Partnerships</p>			<p><b>Sep. 2016-</b> Debra French appointed as Assistant Superintendent</p>			<p><b>Feb. 2020-</b> Bermudez announces medical leave</p>			<p><b>Jun. 2021-</b> Bermudez terminated from BUSD</p>

## Del Terra Timeline (Appendix 0)

9/1/09	2009 Agreement. Program Management Agreement Bassett USD and Del Terra. Effective through June 30, 2010. \$411,595 paid in 10 installments. Scope of work includes at Exhibit A “Assist and coordinate with architect to close all bond projects (Measure E) with DSA, ensure that contractor, consultants, testing and inspection laboratories provide verified reports, testing and inspection documents, contract information, DSA 102, DSA 6 forms, notice of completion, change order documents and any other additional documentation required to close these projects with DSA certification.	\$411,595
10/14/09	Board ratifies Agreement for \$401,595 plus reimbursables of up to \$10,000	
7/1/10	Professional Services Agreement from July 1, 2010 through December 31, 2013	
7/22/10	2010 Program Management Agreement (no “closeout” is included here). This agreement is amended for 2013 Amendment	
8/11/10	Inv 36220-11 Retention paid on 2009 Agreement	
2/8/13	2013 Amendment to 2010 Agreement to “provide the necessary DSA closeout services for the unclosed/open bond, nonbond and legacy projects	\$250,000
3/21/14	District hires Alex Rojas as Deputy Superintendent	
5/14	Alex Rojas becomes Interim Superintendent for the District	
5/1/14	Inv 36240-16 Rev. Retention paid on 2013 Amendment	\$15,000
5/22/14	Amendment to Professional Services Agreement effective 4/1/14 expires 3/31/15. Provide DSA close-out services for un-closed/open bond, non-bond and legacy projects. Perform all actions necessary to achieve DSA closeout for all District buildings that have not received a DSA certification. \$460,0000 to be paid in 12 equal payments (\$36,417 plus 5% retention upon completion)	\$460,000
8/5/14	Board approves Fourth Amendment to Construction Management Agreement (dated 5/25/10) Improvement to 3 classrooms located at Bassett High, Don Julian, and Edgewood Academy for \$300,000.	\$300,000
10/14	Alex Rojas becomes District Superintendent	
11/4/14	The voters in Bassett Unified School District area pass Measure V with a 64.2% vote	

11/4/14	Invoice 36360-02 Final Payment on Demonstration Classrooms paid \$63,000 (payment on 12/4/14) <b>** note even though invoice says 11/20/14 the invoice must be from before 12/4/14 since the payment was made then**</b>	\$63,000
4/21/15	<b>Board approves Program and Construction Management Agreement providing for 4% Program management services fee on the Bond Program and 9.9% pm actual construction costs. Del Terra bills in 36 payments (\$31,666 plus 5% retention of \$39,166)</b>	<b>\$1,200,000 PM CM by Project</b>
4/29/15	Inv. 36370-01 PM and CM Services District-Wide Projects - \$400,000.00 (paid 7/21/16)	\$400,000
5/1/15	Inv. 36245-13 Final Payment for Closeout. Final \$23,000 retention payment made (Check issued 5/20/15)	
7/1/15	Invoice 36255-01 for Development of bond program - \$85,000 (Paid 2/8/16)	\$85,000
9/1/15	Only invoice for 21 <sup>st</sup> Century Classrooms 6-12 Project inv 36380-01 CM is issued for \$431,207 (Payment issued on 9/1/15) Edgewood, Torch and Bassett High.	\$431,207
6/1/16	Extra Services Invoice 36270-01 for Facilities report HVAC Assessment - \$115,750	\$115,750
6/1/16	Extra Services Inv 362230-01 Facility Report, Torch Environmental - \$68,000.00 (Paid 7/21/16)	\$68,000
6/1/16	Extra Services Inv. 362240-01 DSA Close-Out - \$64,500.00 (Paid 7/21/16)	\$64,500
6/1/16	Extra Services Inv 36201-01 District Roofing Assessment - \$74,500.00 (Paid 7/21/16)	\$74,500
6/8/16	1 <sup>st</sup> invoice 36381-01 21 <sup>st</sup> Century Schools TK-6 CM (7/21/16)	\$112,394
9/15/16	Extra Services Inv 36382 21 <sup>st</sup> Century TK-5 Project Reprogramming & Replanning/ Tech - \$230,000.00. Attachment to invoice shows this is for 21 <sup>st</sup> Century Classrooms (Paid 11/28/16)	\$230,000
10/6/16	Last substantive Invoice 36381-05 21 <sup>st</sup> Century Schools TK-5 CM Project (paid 11/9/16)	\$29,972
5/24/17	Alex Rojas Resigns as Superintendent (Alex Rojas is then hired as a consultant Greenvale Consulting for \$12,000 a month) Debra French hired at this time.	

6/2/17	Last Inv 36381-06 21 <sup>st</sup> Century Schools TK-5 CM retention payment (Paid 6/14/17)	\$9,900
4/21/18	Del Terra declares that the 2015 Agreement had expired	
5/3/18	Retention Payment for 2015 Agreement. Invoice 36250R	\$15,855
6/18	Proposed Amendment to 2015 Agreement	
2/5/19	Inv 36500-03 Retention/Final payment on Florence Flanner Modernization. (Paid 3/18/19)	\$42,975
7/29/19	2019 Agreement. Agreement for Program and Construction Management. BHS Swimming pool, gym HVAC, Football Field, Locker Room Various sites, AB 1266, and DSA Close out. \$796,245.	\$796,245
9/24/19	BHS Adult School additional services Bassett Adult School Renovation. Budget \$750,000, PM Fee \$27,298. CM Fee \$40,264. (approved Linda Bermudez)	\$67,562
9/24/19	Prop 39 Climate/Energy Efficiency Project additional service. Budget \$1,035,237. PM Fee \$37,679. CM \$55,577 (Approved Linda Bermudez)	\$93,256
9/24/19	Bassett Adult School Project additional service. Budget \$750,000. PM Fee \$27,298. CM \$40,264	\$67,562
5/21/20	Inv 36511 for close out under 2019 Agreement	\$1,175
2/24/21	DSA stop work order BHS, Edgewood, Sunkist & Van Wig	
3/2/21	DSA follow up letter	
3/19/21	Contract with SGH to close out	\$100,000
4/17/21	Del Terra termination letter issued	