

**PALERMO UNION ELEMENTARY SCHOOL DISTRICT
REQUEST FOR QUALIFICATIONS AND PROPOSALS (RFQ/P #P2022D-001)
ARCHITECTURAL SERVICES**

NOTICE IS HEREBY GIVEN that Palermo Union Elementary School District ("District") is seeking qualified persons, firms, partnerships, corporations, associations, or professional organizations to provide full architectural planning and designing services for the District's projects at Helen Wilcox Elementary, Golden Hills Elementary, and Palermo Middle School ("Projects").

Respondents to the Request for Qualifications and Proposals ("RFQ/P") should mail or deliver five (5) bound copies and one (1) electronic copy on CD/DVD or USB drive of their Statement of Qualifications ("SOQ") and Proposal to:

**Carlo Aguilar, Director of Maintenance, Operations, and Transportation
PALERMO UNION ELEMENTARY SCHOOL DISTRICT
7390 Bulldog Way
Palermo, CA 95968**

ALL RESPONSES ARE DUE BY 2:00 P.M. ON November 18, 2022. Any responses received after that date and time will not be accepted and will be returned unopened.

Mark envelope: "Statement of Qualifications and Proposal for Architectural Services."
FAXED OR EMAILED RESPONSES WILL NOT BE ACCEPTED.

A mandatory pre-proposal conference and site visits will be held on November 1, 2022 at 9:00 A.M.. The site visits will begin at Palermo School (7350 Bulldog Way, Palermo CA) and then proceed to the other two sites. All participants are required to sign-in. Failure to attend or tardiness will render the proposal ineligible. A Site Visit Certification form will be provided at the end of the site visits and must be submitted with the proposal.

Each SOQ and Proposal must conform and be responsive to the requirements set forth in the RFQ/P.

The District reserves the right to waive any informalities or irregularities in received submittals. Further, the District reserves the right to reject any and all submittals and to negotiate contract terms with one or more respondent firms for one or more of the work items. The District retains the sole discretion to determine issues of compliance and to determine whether a respondent is responsive, responsible, and qualified.

If you have any questions regarding this RFQ/P please submit them via email to Carlos Aguilar, Director of MOT, caquilar@palmok8.org before 4:00 p.m. on November 7, 2022. Responses will be posted on the district website (palmemoschools.org) as an Addendum to this RFQ/P by 4:00 p.m. on November 10, 2022.

I. RFQ/P RESPONSE SCHEDULE SUMMARY

The District reserves the right to change the dates on the schedule, set forth below, without prior notice.

DATE / TIME	EVENT
October 20, 2022	Issue RFQ/P.
November 1, 2022 at 9:00 a.m.	Mandatory pre-bid conference and site visits. Site visits will begin at Palermo School, 7350 Bulldog Way, Palermo CA.
November 7, 2022 at 4:00 p.m.	Deadline for submission of written questions to District concerning RFQ/P.
November 18, 2022 at 2:00 p.m.	Deadline for all submissions in response to RFQ/P.
Week of November 21, 2022	Review of submissions by selection committee.
Week of November 28, 2022	Interviews, as requested by selection committee.
Week of November 28, 2022	Notification to selected Firm(s).

II. BACKGROUND

Palermo Union Elementary School District ("District"), located in Butte County, serves about 1,296 students at four schools.

The District is seeking SOQs and Proposals from experienced entities to provide architectural services, including planning, program services, design, coordination, administration, consulting and advice, and related services for the District's projects at Helen Wilcox Elementary, Golden Hills Elementary, and Palermo Middle School ("Projects").

SCHOOL SITE	DESCRIPTION
Helen Wilcox Elementary 5737 Autrey Lane, Oroville, CA 95966	3 portable classrooms, 1 portable bathroom; ADA access to Kindergarten playground
Golden Hills Elementary 2400 Via Canela, Oroville, CA 95966	4 portable classrooms, 1 portable bathroom; 2 shade/rain structures

Palermo Middle School 7350 Bulldog Way, Palermo, CA 95968	4 portable classrooms, 1 portable bathroom, and 1 greenhouse

III. SCOPE OF SERVICES

Any firm selected based on this RFQ/P process must be capable of providing full architectural services through the design and construction phases of any and all selected projects. The architect will also prepare budgets for selected projects and meet, as needed, with District staff and consultants, school and neighborhood organizations, and upper-level District administrators. The desired Scope of Services is set forth at **Exhibit A** to the District’s form Agreement for Architectural Services (“Agreement”), which is distributed with this RFQ/P as **Attachment A** and incorporated herein by this reference. The exact scope of services and final fee, however, will be negotiated with the selected firm and finalized in any resulting contract.

Please note that the District presently does not intend to utilize an outside construction manager for the Projects. Architect’s scope of services will include an expanded role in the Bidding Phase and Construction Contract Administration Phase, among other phases.

IV. FORM OF AGREEMENT

Respondent must be capable of executing and performing in accordance with District’s form of Agreement for Architectural Services (“Agreement”), which is distributed with this RFQ/P as **Appendix A** and incorporated herein by this reference. **Any proposed changes to the form of Agreement must be identified in Respondent’s Submittal;** undisclosed change requests may not be entertained.

V. LIMITATIONS

The award of a contract, if at all, is at the District’s sole discretion. The District reserves the right to contract with any entity responding to this RFQ/P. The District makes no representation that participation in the RFQ/P process will lead to an award of a contract or any consideration whatsoever. Under no circumstances will the District be responsible for the cost of preparing a response to this RFQ/P.

The SOQs, Proposals, and any other supporting materials submitted to the District in response to this RFQ/P, will not be returned and will become the District’s property unless portions of the material are designated as proprietary when submitted and are specifically requested to be returned. Vague designations and/or blanket statements regarding entire pages or documents are insufficient and will not bind the District to protect the designated matter from disclosure.

Pursuant to *Michaelis, Montanari, & Johnson v. Superior Court* (2006) 38 Cal.4th 1065, SOQs and Proposals will be held confidential by the District and will not be subject to disclosure under the California Public Records Act until after either: (1) the District and the successful respondent have completed negotiations and entered into an agreement, or (2)

the District has rejected all Proposals. Furthermore, the District will have no liability to the respondent or other party as a result of any public disclosure of any SOQ or Proposal.

VI. FULL OPPORTUNITY

The District hereby affirmatively ensures that all firms, including without limitation, Disadvantaged Business Enterprises ("DBE"), Small Local Business Enterprises ("SLBE"), Small Emerging Local Business Enterprises ("SELBE"), and Disabled Veterans Business Enterprises ("DVBE"), shall be afforded full opportunity to submit SOQs and Proposals in response to this RFQ/P and no respondent will be discriminated against on the basis of race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, or veteran or military status in any consideration leading to the award of the contract.

VII. RESTRICTIONS ON LOBBYING AND CONTACTS

From the period beginning on the date of the issuance of this RFQ/P and ending on the date of the award of the contract, no person, or entity submitting in response to this RFQ/P, nor any officer, employee, representative, agent, or consultant representing such a person or entity shall contact through any means or engage in any discussion regarding this RFQ/P, the evaluation/selection process, or the award of the contract with any member of the District, Board of Education, selection members, or any member of the Citizens' Oversight Committee. Any such contact shall be grounds for the disqualification of the entity submitting a response.

VIII. RELATIONSHIP TO OUTSIDE GOVERNMENTAL AGENCIES

Depending upon the scope of work, respondent may be required to assist the District in working with various outside governmental agencies, including but not limited to, the following as applicable: City or County Planning Commissions and Departments, the Department of Toxic Substance Control ("DTSC"), the regional air quality control district, the state and regional water quality control boards, the California Department of Education, the Division of the State Architect, the State Allocation Board, and the Office of Public School Construction. Respondent shall discuss its experience with each of these agencies.

IX. CONFLICT OF INTEREST

Respondent shall certify that no official or employee of the District, nor any business entity in which an official of the District has an interest, has been employed or retained to solicit or assist in the procuring of the resulting contract, nor that any such person will be employed in the performance of any contract without immediate divulgence of this fact to the District.

X. INSTRUCTIONS FOR SUBMITTALS

A. Format Requirements

Firms responding to this RFQ/P must comply with the following format requirements. Material must be in 8-1/2 x 11 inch format. Submittals shall include divider tabs labeled with boldface headers below; e.g., the first tab should be entitled "Cover Letter", the second tab should be entitled "Business Information", etc. Submittals must not exceed twenty (20) single-sided pages, or ten (10) double-sided pages.

Provide five (5) bound copies and one (1) electronic copy on CD/DVD or USB drive of the SOQ and Proposal.

- The unbound copy shall be marked "Copy for Reproduction", and shall be formatted as follows:
 - No divider sheets or tabs.
 - Pages with proprietary information removed.
 - A cover sheet listing the firm's name, the total number of pages, and identifying those pages that were removed due to proprietary information.

B. Content Requirements

1. Cover Letter

- Provide an introduction letter signed by the architectural services company's authorized officer. If the architectural services company is a joint venture, duplicate the signature block and have a principal or officer also sign on behalf of each party to the joint venture.
- Identify clearly the individual(s) who are authorized to speak for the firm during the evaluation process.
- Respondent must include one (1) of the follow statements:

"[INSERT FIRM NAME] received a copy of the District's form of Agreement for Architectural Services Agreement ("Agreement") attached as Attachment A to the RFQ/P. [INSERT FIRM NAME] has reviewed the indemnity provisions and professional liability insurance provisions contained in the Agreement. If given the opportunity to contract with the District, [INSERT FIRM NAME] has no objections to the use of the Agreement."

OR

"[INSERT FIRM NAME] received a copy of the District's form of Agreement for Architectural Services ("Agreement") attached as Attachment A to the RFQ/P. [INSERT FIRM NAME] has reviewed the indemnity provisions and professional liability insurance provisions contained in the Agreement. If given the opportunity to contract with the District, [INSERT FIRM NAME] has objections to the use of the Agreement, listed as follows or as contained in the appendix to this Submittal."

A copy of District's form of Agreement is attached to this RFQ/P as **Attachment A**. To the extent Respondent has any objections to the form agreement, Respondent must state the objection, and must provide a reasonable description of its requested change in response to the objection. **The District will not entertain unidentified objections or vaguely described objections during any contract negotiation.** Objections may be attached as an Appendix to Respondent's response and will not count toward the page limit.

- Respondent shall certify that no official or employee of the District, nor any business entity in which a District official has an interest, has been employed or retained to solicit or assist in the procuring of the resulting contract(s), nor that any such person will be employed in the performance of any/all contract(s) without immediate divulgence of this fact to the District.

- Respondent shall certify no firm official or employee has ever been convicted of an ethics violation.
- Respondent shall sign and add the following language: *"By virtue of this submission, [INSERT FIRM NAME] declares that all information provided is true and correct."*

2. Business Information

- Company name, address, telephone, fax, and website.
- Name and email of main contact.
- Federal Tax I.D. Number.
- License or Registration Number.
- Type of organization (i.e. corporation, partnership, etc.). If a joint venture, describe the division of responsibilities between participating companies, offices (location) that would be the primary participants, and percentage interest of each firm.
- A brief description and history of the firm, including number of years the firm has been in business and date firm was established under its given name.
- Office location where the bulk of services solicited will be performed.
- State of California certification for your firm of Small Business or Disabled Veteran Business Enterprise status, if any.

3. Relevant Qualifications and Experience

- Describe your firm's approach to quality control/assurance procedures, including coordination of design disciplines and DSA final certification.
- Describe the approach to conformance with federal/state/local applicable code requirements, including Title 24 of the California Code of Regulations.
- Describe your firm's experience with construction cost reduction measures such as, but not limited to, value engineering in design and construction.
- Describe your firm's experience with DSA and working within the DSA processes.
- Describe your firm's experience with the Office of Public School Construction ("OPSC") and working within the OPSC processes.
- Describe your firm's experience with the Commissioning process.
- Describe your firm's experience with meeting aggressive completion schedules.
- Describe your firm's experience with alternate delivery construction methods.

- Provide information about prior services furnished/designs prepared by your firm in the last ten (10) years on a minimum of three (3) K-12 and/or community college educational projects. List the following for each project:
 - Reference(s): District name and name of contact person, title, telephone number, and email address to be contacted for a reference.
 - Project name and location.
 - Beginning and end dates of project (i.e., Notice of Completion and DSA final certification).
 - Original budget, bid amount, and final project cost at close-out.
 - Number of RFIs, Bulletins or Architect Supplemental Instructions, Change Order Requests, Change Orders for each project.
 - Briefly state relevance of projects included for consideration in this RFQ/P.
 - Specify role of firm or individual if work was not exclusively by the firm (i.e., joint venture, association).
 - Key individuals of the firm involved and their roles in the project.
 - Any sub-consultants that worked with the firm.
- Identify any and all K-12, community college, and/or other educational projects that your firm served as the design professional and was not closed-out by DSA and provide explanation.

4. Project Team Summary

- Identify key team members, including sub-consultants, and state their qualifications relevant to the scope of the Projects. Include the key personnel experience with DSA projects and other factors you believe is important and will assist the District in evaluating your firm's qualifications. Note, all proposers are hereby notified that the key personnel identified in the response to this RFQ/P is a material factor the District will evaluate in selecting the successful proposer. Therefore, proposers hereby acknowledge and understand that if awarded the contract, the key personnel identified in the response to this RFQ/P will be designated to perform services pursuant to the contract award.
- Each Submittal must include evidence that the firm is legally permitted and properly licensed for the scope of work and to conduct business in the State of California.
- Absent extenuating circumstances, the District requires the key personnel identified as the Respondent's team will remain intact through the project(s) duration. If a team member must leave, respondent must provide the explanation for such departure and provide a replacement team member at Respondent's expense and subject to the District's reserving the right to approve that team member's replacement.

5. Litigation History

Provide a comprehensive five (5)-year summary of the firm's claims, litigation, arbitration, and negotiated/settlement history with previous clients ("Claims"). This includes current/ongoing Claims. For each lawsuit, state the issues in the lawsuit, the status of the lawsuit, names of parties, and outcome. A Submittal failing to provide the requested information on past and present Claims, including lawsuits, and responses that assert attorney-client privilege and fail to provide the information requested, will be considered non-responsive, disqualified from the selection process, and will not be evaluated.

6. Fee Proposal

In a sealed envelope accompanying your SOQ and labeled as "[FIRM NAME] Fee Proposal for RFQ/P # **P2022D-001**," provide a general fee proposal for the Projects. The fee proposal shall also include hourly billing rates by position (proposed); staffing plan (proposed); and reimbursable schedule (proposed). The Proposal shall provide a Schedule of Rates ("SOR") by position, for each position proposed by your firm, whether you are submitting as a prime with subconsultant(s), or as joint venture or partnership. The SOR should identify proposed reimbursables by category. This SOR will be the basis for calculating the value of any additional services that may be added to the Respondent's scope of work.

7. Appendix (if used)

- Firm brochure/history/background, reprints, etc.
- Key team member resumes
- Objections to District's form of agreement, reasonably described and including proposed change(s).

XI. SELECTION PROCESS AND CRITERIA

A Committee will evaluate all submissions. Each submittal must be complete. Incomplete submittals will be considered nonresponsive and grounds for disqualification. The District retains the sole discretion to determine issues of compliance and to determine whether a firm is responsive, responsible, and qualified. Based upon the information presented in the submissions, the District may elect to conduct interviews with some or all of the respondents. After the interviews, if any, the Committee will identify the firm(s)/team(s) that can provide the greatest overall benefit to the District.

A. Evaluation Criteria

Submittals will be reviewed for responsiveness and evaluated pursuant to the specific criteria set forth in this RFQ/P, including, without limitation:

1. Experience and performance history of the firm with similar services;
2. Experience and results of proposed personnel;
3. Acceptable and verifiable professional references for relevant experience;

4. Current commitments and ability of firm to handle several simultaneous projects, including without limitation, availability of staffing and the level of service and support for the Projects, and availability of resources to meet anticipated schedule and Projects' requirements;
5. Capacity and commitment to provide services to District, including ability to respond to District's requests in a timely and appropriate fashion; to inform District of all issues discovered on Projects; and to work positively and cooperatively with District's team;
6. Credentials, including without limitation, professional and technical expertise, of specific employees assigned as members of the proposed team for the District;
7. Proposed Fee and value of services; and
8. Overall responsiveness of the SOQ and Proposal.

B. District Investigations

The District may perform investigations of responding parties that extend beyond contacting the references identified in the SOQs. The District may request a respondent to submit additional information pertinent to the review process. The District also reserves the right to investigate and rely upon information from other available sources in addition to any documents or information submitted.

C. Interviews

The District, at its sole discretion, may elect to interview selected firm(s). The District may elect to interview one or more firms. In the event the District does so, the procurement scoring will be cumulative. If your firm is requested to come in for an interview, the key proposed Projects staff will be expected to attend the interview. The interview will be an opportunity for the District's Selection Committee to further inquire as to the firm's suggested approaches to the Projects and the issues identified in this RFQ/P. Any comments or objections to the District's form of Agreement attached to this RFQ/P as **Attachment A** may be the subject of inquiry at the interview.

XII. FINAL DETERMINATION AND AWARD

Respondents to this RFQ/P should mail or deliver five (5) bound copies and one of their Statement of Qualifications and Proposal to:

Carlos Aguilar, Director of Maintenance, Operations and Transportation
PALERMO UNION ELEMENTARY SCHOOL DISTRICT
7390 Bulldog Way
Palermo, CA 95968

ALL RESPONSES ARE DUE BY 2:00 P.M., ON November 18, 2022. Any submittal received after that date and time will not be accepted and will be returned unopened.

Mark envelope: "Statement of Qualifications and Proposal for Architectural Services." Fax or emailed responses will not be accepted. Late submittals will not be accepted or considered.

The District reserves the right to contract with any entity responding to this RFQ/P for all or portions of the above-described services, to reject any SOQ and Proposal as non-responsive, and/or not to contract with any respondent for the services described herein. The District makes no representation that participation in the RFQ/P process will lead

to an award of contract or any consideration whatsoever. The District reserves the right to seek proposals from or to contract with any firm not participating in this process. The District shall in no event be responsible for the cost of preparing any response to this RFQ/P.

The awarding of contract(s) is at the sole discretion of the District. The District may, at its option, determine to award contract(s) only for portions of the scope of work identified herein. In such case, the successful firm(s) will be given the option not to agree to enter into the contract and the District will retain the right to negotiate with any other proposing firm selected as a finalist. If no finalist is willing to enter into a contract for the reduced scope of work, the District will retain the right to enter into negotiations with any other firm responding to this RFQ/P.

THANK YOU FOR YOUR INTEREST IN THESE EXCITING PROJECTS!

ATTACHMENT A
DISTRICT'S AGREEMENT FOR ARCHITECTURAL SERVICES

[REMAINDER OF PAGE INTENTIONALLY BLANK; ATTACHMENT FOLLOWS]

EXHIBIT A
RESPONSIBILITIES AND SERVICES OF ARCHITECT

TABLE OF CONTENTS

A.	SCOPE OF PROJECT	1
B.	BASIC SERVICES	1
C.	PRE-DESIGN AND START-UP SERVICES	4
D.	SCHEMATIC DESIGN PHASE	7
E.	DESIGN DEVELOPMENT PHASE	11
F.	CONSTRUCTION DOCUMENTS PHASE	15
G.	BIDDING PHASE	21
H.	CONSTRUCTION CONTRACT ADMINISTRATION PHASE	23
I.	CLOSE OUT PHASE	28
J.	MEETINGS / SITE VISITS / WORKSHOPS	29

EXHIBIT A

RESPONSIBILITIES AND SERVICES OF ARCHITECT

Architect shall provide all professional services necessary for completing the following:

A. SCOPE OF PROJECT

1. Project Name: Projects at Helen Wilcox Elementary, Golden Hills Elementary, and Palermo Middle School

School Site	Description
Helen Wilcox Elementary 5737 Autrey Lane, Oroville, CA 95966	3 portable classrooms, 1 portable bathroom; ADA access to Kindergarten playground
Golden Hills Elementary 2400 Via Canela, Oroville, CA 95966	4 portable classrooms, 1 portable bathroom
Palermo Middle School 7350 Bulldog Way, Palermo, CA 95968	4 portable classrooms, 1 portable bathroom, and 1 greenhouse

2. Construction Cost Budget: \$3,000,000

B. BASIC SERVICES

Architect agrees to provide the Services described below:

1. Architect shall be responsible for the professional quality and technical accuracy of all studies, reports, projections, master plans, designs, drawings, specifications and other services furnished by Architect under the Agreement as well as coordination with all master plans, studies, reports and other information provided by District. Architect shall, without additional compensation, correct or revise any errors or omissions in its studies, reports, projections, master plans, design, drawings, specifications and other Services.
2. Architect will use all due care and diligence to confirm that its plans and specifications and all other information provided by or on behalf of District to potential bidders discloses and publishes any potentially relevant information that could, in any way, have an impact on a Contractor's cost of performance. Architect shall advise District of the most effective methods of identifying and securing such information as part of each stage of design. Architect shall track for District's benefit all such suggested and disclosed information.
3. District shall provide all information available to it to the extent the information relates to Architect's scope of work. This information shall include, if available,
 - a. As-builts;

- b. Physical characteristics;
- c. Legal limitations and utility locations for the Project site(s);
- d. Written legal description(s) of the Project site(s);
- e. Grades and lines of streets, alleys, pavements, and adjoining property and structures;
- f. Adjacent drainage;
- g. Rights-of-way, restrictions, easements, encroachments, zoning, deed restrictions, and boundaries and contours of the Project site(s);
- h. Locations, dimensions and necessary data with respect to existing buildings, other improvements and trees;
- i. Information concerning available utility services and lines, mechanical and other services, both public and private, above and below grade, including inverts and depths;
- j. Surveys, reports, as-built drawings, record drawings; and
- k. Subsoil data, chemical data, and other data logs of borings.

Architect shall Visually Verify this information and all existing Project utilities, including capacity, and document the location of existing utility lines, telephone, water, sewage, storm drains and other lines on or around the Project to the extent determinable by the documents provided by District.

If Architect determines that the information or documentation District provides is insufficient for purposes of design, or if Architect requires: a topographical survey; a geotechnical report; structural, mechanical, and/or chemical tests; tests for air and/or water pollution; test borings; test pits; determinations of soil bearing values; percolation tests; ground corrosion tests; resistivity tests; tests for hazardous materials; tests for anticipating subsoil conditions; and/or other information that District has not provided, then, at the soonest possible time after Architect has become aware that this additional information is needed, Architect shall request that District acquire that information. If the Parties mutually agree in writing, this additional information and service shall be procured through Architect, who may invoice District for those services as Extra Services.

- 4. **District Standards.** Architect shall incorporate into its work and the work of all Consultants the adopted District standards for facilities and construction.
- 5. **Mandatory Assistance.** If a third party dispute or litigation, or both, arises out of, or relates in any way to the Services provided under this Agreement, upon District's request, Architect, its agents, officers, and employees agree to assist in resolving the dispute or litigation. Architect's assistance includes, but is not limited to, providing professional consultations, attending mediations, arbitrations, depositions, trials or

any event related to the dispute resolution and/or litigation ("Mandatory Assistance").

[REMAINDER OF PAGE LEFT INTENTIONALLY BLANK]

C. PRE-DESIGN AND START-UP SERVICES

1. Project Initiation

Upon final execution of the Agreement with District, Architect shall:

- a. Within the first week following execution of the Agreement, review the proposed Schedule of Services set forth in **Exhibit C** to the Agreement and prepare a detailed scope of work list and work plan for documentation to District's satisfaction. This scope of work list and work plan will identify specific tasks including, but not limited to: interviews, data collection, analysis, report preparation, planning, architectural programming, concepts and schematic design preparation and estimating that are part of the work of the Project. Architect shall also identify milestone activities or dates, specific task responsibilities, required completion times necessary for review and approval by District and by all regulatory agencies and additional definition of deliverables.
- b. Review the developed work plan with District and its representatives to familiarize them with the proposed tasks and schedule and develop necessary modifications.

2. Development of Architectural Program

Architect shall prepare for District's review of an architectural program as follows:

- a. Perform pre-design investigations to establish appropriate guidelines around which and within which the Project is to be designed. Identify design issues relating to functional needs, directives and constraints imposed by regulatory codes. Review all data pertinent to the Project including survey, site maps, geotechnical reports and recommendations, soil testing results reports, and pertinent historical data, and other relevant information provided by District.
- b. Review DSA codes pertaining to the proposed Project design.
- c. Identify design issues relating to functional needs, directives and constraints imposed by applicable regulatory codes.
- d. Based on survey and topography data provided by District, input into computer and develop existing conditions base for the Schematic Design Phase.
- e. Administer Project as required to coordinate work with District and among Consultants.
- f. Adhere to and further develop existing District standards for facilities and construction, including but not limited to designation of any material, product, thing or service by specific brand or trade name pursuant to Public Contract Code section 3400, subdivision (c).

3. Construction Cost Budget

- a. Architect shall have responsibility to further develop, review, and reconcile the Construction Cost Budget within the parameters of the Construction Budget

established by District for the Project. The estimates forming the basis of the Construction Cost Budget are to be based on the developed functional architectural program as approved by District. The following conditions apply to the Construction Cost Budget prepared by Architect:

- (i) All costs are to be based on current market or bid prices, with escalation rate and duration clearly identified as a separate line item; rate of cost escalation and projected bid and construction dates are to be approved by District and its representatives.
 - (ii) Format shall be in a building systems format (e.g., foundations, substructure, structural system, exterior wall enclosure, window systems, etc.) for new buildings, and summarized by the Construction Specification Institute ("CSI") categories for buildings being modernized.
 - (iii) Contingencies for design, bidding, and construction are to be included as individual line items, with the percentage and base of calculation clearly identified.
 - (iv) Architect shall include all information and estimates from District that are intended to be part of the Construction Cost Budget.
 - (v) One week prior to submittal of documents, Architect shall submit its proposed Construction Cost Budget to District for review and approval. At that time, Architect shall coordinate with District to further develop, review, and reconcile the Construction Cost Budget.
 - (vi) Mechanical, electrical, civil, landscape and estimating consultant(s) shall participate in the progress meeting as appropriate and shall provide input and feedback into the development of the Construction Cost Budget.
- b. The Construction Cost Budget for the Project must at no point exceed District's Construction Budget for the Project. The accuracy of the Construction Cost Budget, including the costs for redesign necessary to maintain the Construction Cost Budget for the Project, shall be the responsibility of Architect.

4. Presentation

If requested, Architect, along with any involved consultant(s), shall present and review with District and, if directed, with District's Governing Board, the summary and detail of work involved in this Phase, including two-dimensional renderings of any proposed facility suitable for public presentation.

5. Deliverables and Numbers of Copies

Within thirty (30) days of the end of this Phase, Architect shall provide to District an electronic copy of the following items produced in this Phase:

- a. Architectural Program (include comparison between developed program and "model" program, include narrative explaining any substantial deviations);
- b. Site Plan;

- c. Revised Construction Cost Budget;
- d. Final Schedule of Services;
- e. Meeting Reports/Minutes from the Kick-off and other meetings; and
- f. Renderings, if requested by District.

6. Meetings

During this Phase, Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below in Section J.

[REMAINDER OF PAGE LEFT INTENTIONALLY BLANK]

D. SCHEMATIC DESIGN PHASE

Upon District's acceptance of Architect's work in the previous Phase and assuming District has not delayed or terminated the Agreement, Architect shall prepare for District's review a Schematic Design Study, containing the following items as applicable to the Project scope, as follows:

1. Prepare and review with District staff a scope of work list and work plan identifying specific tasks including, but not limited to: interviews, data collection, analysis, report preparation, planning, architectural programming, concepts and schematic design preparation and estimating that are part of the work of the Project. Also identified will be milestone activities or dates, specific task responsibilities of Architect, required completion times necessary for the review and approval by District and by pertinent regulatory agencies and additional definition of deliverables.
2. Review the developed work plan with District and its representatives to familiarize them with the proposed tasks and schedule and develop necessary modifications.

3. Architectural

- a. Scaled floor plans showing overall dimensions, identifying the various major areas and their relationship. Include circulation and room-by-room tabulation of all net usable floor areas and a summary of gross floor area. Also, provide typical layouts of major equipment or operational layout.
- b. Preliminary building exterior elevations and sections in sufficient detail to demonstrate design concept indicating location and size of fenestration.
- c. As applicable, identify proposed roof system, deck, insulation system, and drainage technique.
- d. Identify minimum finish requirements, including ceiling, floors, walls, doors, windows, and types of hardware.
- e. Identify code requirements, include occupancy classification(s) and type of construction.

4. Structural

- a. Layout structural systems with dimensions and floor elevations. Identify structural systems (including pre-cast, structural steel with composite deck, structural steel bar joists) with preliminary sizing identified.
- b. Identify foundation systems (including fill requirements, piles, caissons, spread footings) with preliminary sizing identified.

5. Mechanical

- a. Calculate block heating, ventilation, and cooling loads including skin versus internal loading.

- b. Select a minimum of two (2) HVAC systems that appear compatible with loading conditions for subsequent life cycle costing.
- c. Show selected system on drawings as follows:
 - (i) Single line drawing(s) of all mechanical equipment spaces, ductwork and pipe chases.
 - (ii) Location and preliminary sizing of all major equipment and duct work in allocated spaces.
 - (iii) Schematic piping.
 - (iv) Temperature control zoning.
- d. Provide design criteria to include the intent base of design for the Project.
- e. Evaluate and confirm the load requirements of all equipment and systems, the impact of those on existing facilities, and the requirements to increase these loads to accommodate the increase.

6. Electrical

- a. Calculate overall approximate electrical loads.
- b. Identify proposed electrical system for service, power, lighting, low voltage and communication loads, including proposed or planned additional buildings or other facilities on the Project site.
- c. Show system(s) selected on drawings as follows:
 - (i) Single line drawing(s) showing major distribution system.
 - (ii) Location and preliminary sizing of all major electrical systems and components including:
 - (A) Load centers.
 - (B) Main panels.
 - (C) Switch gear.
- d. Provide design criteria to include the intent base of design for the Project.
- e. Evaluate and confirm the load requirements of all equipment and systems, the impact of those on existing facilities, and the requirements to increase these loads to accommodate the increase.

7. Civil

- a. Develop on and off site utility systems such as sewer, water, storm drain, firewater lines and fire hydrants.

- b. Identify surface improvements including roadways, walkways, parking (with assumed wheel weights), preliminary finish grades and drainage.
- c. Coordinate finish floor elevations with architectural site plan.

8. Specifications

Prepare outline specifications of proposed architectural, structural, mechanical and electrical materials, systems and equipment and their criteria and quality standards. Architect is to use District's standardized equipment/material list for new construction and modernization in development of the Project design and specifications. Architect shall review and comment on District's construction bid contracts and contract documents (the "Division 0" and "Division 1" documents) as part of its Services under the Agreement.

9. Construction Cost Budget

Revise the Construction Cost Budget for the Project. Along with the conditions identified in the preceding Phase, the following conditions apply to the revised Construction Cost Budget:

- a. Schematic Estimates: This estimate consists of unit cost applied to the major items and quantities of work. The unit cost shall reflect the complete direct current cost of work. Complete cost includes labor, material, waste allowance, sales tax and subcontractor's mark-up.
 - (i) General conditions shall be applied separately. This estimate shall be prepared by specification section and summarized by the CSI categories.
- b. The estimate shall separate the Project's building cost from site and utilities cost. Architect shall submit to District the cost estimating format for prior review and approval.
- c. Escalation: all estimates shall be priced out at current market conditions. The estimates shall incorporate all adjustments as appropriate, relating to mid-point construction, contingency, and cost index (i.e. Lee Saylor Index).
- d. The Construction Cost Budget for the Project must at no point exceed District's Construction Budget. The accuracy of the Construction Cost Budget shall be the responsibility of Architect.
- e. Architect shall submit its proposed Construction Cost Budget to District for review and approval. At that time, Architect shall coordinate with District to further develop, review, and reconcile the Construction Cost Budget.
- f. At the end of this Phase, the Construction Cost Budget may include design contingencies of no more than ten percent (10%) in the cost estimates.
- g. The Construction Cost Budget for the Project must at no point exceed District's Construction Budget for the Project. The accuracy of the Construction Cost

Budget, including the costs for redesign necessary to maintain the Construction Cost Budget for the Project, shall be the responsibility of Architect.

10. Deliverables and Numbers of Copies

Within thirty (30) days of the end of this Phase, Architect shall provide to District a hard copy of the following items produced in this phase, together with one (1) copy of each item in electronic format:

- a. Breakdown of Construction Cost Budget as prepared for this Phase;
- b. Meeting reports/minutes;
- c. Schematic Design Package with alternatives;
- d. Statement indicating changes made to Architectural Program and Schedule;
and
- e. Copy of the DSA file, including all correspondence and meeting notes to date, or notification in writing that Architect has not met or corresponded with DSA.

11. Presentation

- a. Architect shall present and review with District the detailed Schematic Design.
- b. The Schematic Design shall be revised within the accepted program parameters until a final concept within the accepted Construction Cost Budget has been accepted and approved by District at no additional cost to District.

12. Meetings

During this Phase, Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below in Section J.

[REMAINDER OF PAGE LEFT INTENTIONALLY BLANK]

E. DESIGN DEVELOPMENT PHASE

Upon District's acceptance of Architect's work in the previous Phase and assuming District has not delayed or terminated the Agreement, Architect shall prepare from the accepted deliverables from the Schematic Design Phase, the Design Development Phase documents consisting of the following for each proposed system within Architect's scope of services:

1. Architectural

- a. Scaled, dimensioned floor plans with final room locations including all openings.
- b. 1/8" scale building sections showing dimensional relationships, materials and component relationships.
- c. Exterior elevations of all proposed new buildings, existing buildings to be renovated and all architectural elements of the Project.
- d. Identification of all fixed equipment to be installed in Project.
- e. Interior finishes identified and located within the rooms of all buildings.
- f. Site plan completely drawn with beginning notes and dimensions including grading and paving.
- g. Preliminary development of details and large scale blow-ups.
- h. Legend showing all symbols used on drawings.
- i. Floor plans identifying all fixed and major movable equipment and furniture.
- j. Further refinement of Outline Specifications for architectural, structural, mechanical, electrical, civil and landscape manuals, systems and equipment.
- k. Typical reflected ceiling development including ceiling grid and heights for each ceiling to be used, showing:
 - (i) Light fixtures.
 - (ii) Ceiling registers or diffusers.
 - (iii) Access Panels.

2. Structural

- a. Structural drawings with all major members located and sized.
- b. Establish final building and floor elevations.
- c. Preliminary specifications.

- d. Preliminary calculations for the structural systems including lateral force resistive systems, foundations, and all structural system components.
- e. Identify foundation requirement (including fill requirement, piles) with associated soil pressure, water table and seismic center.

3. Mechanical

- a. Heating and cooling load calculations as required and major duct or pipe runs sized to interface with structural.
- b. Major mechanical equipment should be scheduled indicating size and capacity.
- c. Ductwork and piping should be substantially located and sized.
- d. Plumbing plans for the Project shall indicate numbers and locations of fixtures and be in conformance with the code-mandated fixture count requirements of the Project.
- e. Devices in ceiling should be located.
- f. Legend showing all symbols used on drawings.
- g. More developed Outline Specifications indicating quality level and manufacture.
- h. Control Systems identified.
- i. Further evaluation and confirmation of the load requirements of all equipment and systems, the impact of those on existing facilities, and the requirements to increase these loads to accommodate the increase.

4. Electrical

- a. All lighting fixtures should be located and scheduled showing all types and quantities of fixtures to be used, including proposed lighting levels for each usable space.
- b. All major electrical equipment should be scheduled indicating size and capacity.
- c. Complete electrical distribution including a one-line diagram indicating final location of switchboards, communications, controls (high and low voltage), motor control centers, panels, transformers and emergency generators, if required. Low-voltage system includes fire alarm system, security system, clock and public address system, bell system, voice-data system, and telecom/technology system.
- d. Legend showing all symbols used on drawings.
- e. More developed and detailed Outline Specifications indicating quality level and manufacture.

- f. Further evaluation and confirmation of the load requirements of all equipment and systems, the impact of those on existing facilities, and the requirements to increase these loads to accommodate the increase.

5. Civil

- a. Further refinement of Schematic Design Phase development of on and off site utility systems for sewer, electrical, water, storm drain and fire water. Includes, without limitation, pipe sizes, materials, invert elevation location and installation details.
- b. Further refinement of Schematic Design Phase roadways, walkways, parking and storm drainage improvements. Includes details and large scale drawings of curb and gutter, manhole, thrust blocks, paved parking and roadway sections.

6. Bid Documents

Architect shall review and comment on District's construction bid contracts and contract documents (the "Division 0" documents and "Division 1" documents) as part of its Services under the Agreement.

7. Construction Cost Budget

- a. Revise the Construction Cost Budget for the Project. Along with the conditions identified in the Agreement and the preceding Phases, the following conditions apply to the revised Construction Cost Budget:
 - (i) Design Development Estimate: This further revised estimate shall be prepared by specification section, summarized by CSI category and divided by trade and work item. The estimate shall include individual item unit costs of materials, labor and equipment. Sales tax, Contractor's mark-ups, and general conditions shall be listed separately.
 - (ii) The Construction Cost Budget for the Project must at no point exceed District's Construction Budget. The accuracy of the Construction Cost Budget shall be the responsibility of Architect.
 - (iii) At this stage of the design, the Construction Cost Budget may include design contingencies of no more than ten percent (10%) in the cost estimates.
- b. Architect shall submit its proposed Construction Cost Budget to District for review and approval. At that time, Architect shall coordinate with District to further develop, review, and reconcile the Construction Cost Budget.
- c. The Construction Cost Budget for the Project must at no point exceed District's Construction Budget for the Project. The accuracy of the Construction Cost Budget, including the costs for redesign necessary to maintain the Construction Cost Budget for the Project, shall be the responsibility of Architect.

8. Deliverables and Numbers of Copies

Architect shall provide to District a hard copy of the following items produced in this phase, together with one (1) copy of each item in electronic format:

- a. Design Development drawing set from all professional disciplines necessary to deliver the Project;
- b. Specifications;
- c. Revised Construction Cost Budget; and
- d. Copy of the DSA file, including all correspondence and meeting notes to date, or notification in writing that Architect has not met or corresponded with DSA.

The Design Development deliverables shall be revised within the accepted program parameters until a final concept within the accepted Construction Cost Budget has been accepted and approved by District at no additional cost to District.

9. Meetings

During this Phase, Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below in Section J.

[REMAINDER OF PAGE LEFT INTENTIONALLY BLANK]

F. CONSTRUCTION DOCUMENTS PHASE

Upon District's acceptance of Architect's work in the previous Phase and assuming District has not delayed or terminated the Agreement, Architect shall prepare from the accepted deliverables from the Design Development Phase the Construction Documents consisting of the following for each proposed system within Architect's scope of work. All Projects subject to DSA's jurisdiction shall be submitted for review, back check, and approval, under the electronic plan review process ("EPR process"), rather than paper submission.

1. Construction Documents ("CD") 50% Stage:

a. General

Verify lead times and availability of all Project equipment, materials, and supplies and ensure that all of these will be available to the Contractor in a timely fashion so as not to delay the Project.

b. Architectural

- (i) Site plan developed to show building location, all topographical elements and existing/proposed contour lines.
- (ii) Elevations (exterior and interior), sections and floor plans corrected to reflect design development review comments.
- (iii) Architectural details and large blow-ups started.
- (iv) Well-developed finish, door, and hardware schedules.
- (v) Site utility plans started.
- (vi) Fixed equipment details and identification started.
- (vii) Reflected ceiling plans coordinated with floor plans and mechanical and electrical systems.

c. Structural

- (i) Structural floor plans and sections with detailing well advanced.
- (ii) Structural footing and foundation plans, floor and roof framing plans with detailing well advanced.
- (iii) Completed cover sheet with general notes, symbols and legends.

d. Mechanical

- (i) Mechanical calculations virtually completed with all piping and ductwork sized.
- (ii) Large scale mechanical details started.

(iii) Mechanical schedule for equipment substantially developed.

(iv) Complete design of Energy Management System ("EMS").

e. Electrical

(i) Lighting, power, signal and communication plans showing all switching and controls. Fixture schedule and lighting details development started.

(ii) Distribution information on all power consuming equipment; lighting and device branch wiring development well started.

(iii) All electrical equipment schedules started.

(iv) Special system components approximately located on plans.

(v) Complete design of low-voltage system. Low-voltage system includes fire alarm system, security system, clock and public address system, voice-data system, and telecom/technology system.

f. Civil

All site plans, site utilities, parking, walkway, and roadway systems updated to reflect update revisions from Design Development Phase Documents.

g. Construction Cost Budget

(i) Revise the Construction Cost Budget for the Project. Along with the conditions identified in the preceding phases, Architect shall update and refine the Design Development Phase revisions to the Construction Cost Budget. Architect shall provide a Construction Cost Budget sorted by Project Bid Packages, if more than one.

(ii) The Construction Cost Budget for the Project must at no point exceed District's Construction Budget. The accuracy of the Construction Cost Budget shall be the responsibility of Architect.

(iii) Architect shall submit its proposed Construction Cost Budget to District for review and approval. At that time, Architect shall coordinate with District to further develop, review, and reconcile the Construction Cost Budget.

(iv) At this stage of the design, the Construction Cost Budget may include design contingencies of no more than five percent (5%) in the cost estimates.

(v) The Construction Cost Budget for the Project must at no point exceed District's Construction Budget for the Project. The accuracy of the Construction Cost Budget, including the costs for redesign necessary to maintain the Construction Cost Budget for the Project, shall be the responsibility of Architect.

h. Specifications

More than fifty percent (50%) complete development and preparation of technical specifications describing materials, systems and equipment, workmanship, quality and performance criteria required for the construction of the Project.

- (i) No part of the specifications shall call for a designated material, product, thing, or service by specific brand or trade name unless:
 - (A) The specification is followed by the words "or equal" so that bidders may furnish any equal material, product, thing, or service, as required by Public Contract Code section 3400, or
 - (B) The designation is allowable by a specific allowable exemption or exception pursuant to Public Contract Code section 3400.
- (ii) Specifications shall not contain restrictions that will limit competitive bids other than those required for maintenance convenience by District and only with District's prior approval.
- (iii) Specifications shall be in CSI format.

i. Deliverables and Numbers of Copies

Within thirty (30) days of the end of this Phase, Architect shall provide to District a hard copy of the following items produced in this Phase, together with one (1) copy of each item in electronic format:

- (i) Working drawings;
- (ii) Specifications;
- (iii) Statement of requirements for testing and inspection of service for compliance with Contract Documents and applicable codes; and
- (iv) Statement indicating any authorized changes made to the design from the last Phase and the cost impact of each change on the previously approved Construction Cost Budget. If no design changes occur but shifts of costs occur between disciplines, identify for District review.

2. Construction Documents – 100% / Completion Stage:

a. Architectural

- (i) Completed site plan.
- (ii) Completed floor plans, elevations, and sections.
- (iii) Architectural details and large blow-ups completed.
- (iv) Finish, door, and hardware schedules completed, including all details.

- (v) Site utility plans completed.
- (vi) Fixed equipment details and identification completed.
- (vii) Reflected ceiling plans completed.

b. Structural

- (i) Structural floor plans and sections with detailing completed.
- (ii) Structural calculations completed.

c. Mechanical

- (i) Large scale mechanical details complete.
- (ii) Mechanical schedules for equipment completed.
- (iii) Completed electrical schematic for environmental cooling and exhaust equipment.
- (iv) Complete energy conservation calculations and report.

d. Electrical

- (i) Lighting and power plan showing all switching and controls. Fixture schedule and lighting details completed.
- (ii) Distribution information on all power consuming equipment, including lighting, power, signal and communication device(s) branch wiring completed.
- (iii) All electrical equipment schedules completed.
- (iv) Special system components plans completed.
- (v) Electrical load calculations completed.

e. Civil

All site plans, site utilities, parking and roadway systems completed.

f. Construction Cost Budget

- (i) Revise the Construction Cost Budget for the Project. Along with the conditions identified in the preceding phases, Architect shall update and refine the fifty percent (50%) Construction Documents Phase revisions to the Construction Cost Budget.
- (ii) The Construction Cost Budget for the Project must at no point exceed District's Construction Budget. The accuracy of the Construction Cost Budget shall be the responsibility of Architect.

- (iii) Architect shall submit its proposed Construction Cost Budget to District for review and approval. At that time, Architect shall coordinate with District to further develop, review, and reconcile the Construction Cost Budget.
- (iv) At this stage of the design, the Construction Cost Budget shall not include any design contingencies in excess of the cost estimates.
- (v) The Construction Cost Budget for the Project must at no point exceed District's Construction Budget for the Project. The accuracy of the Construction Cost Budget, including the costs for redesign necessary to maintain the Construction Cost Budget for the Project, shall be the responsibility of Architect.

g. Specifications

- (i) Complete development and preparation of technical specifications describing materials, systems and equipment, workmanship, quality and performance criteria required for the construction of the Project.
- (ii) No part of the specifications shall call for a designated material, product, thing, or service by specific brand or trade name unless:
 - (A) The specification is followed by the words "or equal" so that bidders may furnish any equal material, product, thing, or service, as required by Public Contract Code section 3400, or
 - (B) The designation is allowable by specific allowable exemptions or exceptions pursuant to Public Contract Code section 3400.
- (iii) Specifications shall not contain restrictions that will limit competitive bids other than those required for maintenance convenience by District and only with District's prior approval.
- (iv) At one hundred percent (100%) review, District shall review the Specifications and shall direct Architect to make corrections at no cost to District.
- (v) Coordination of the Specifications with specifications developed by other disciplines.
- (vi) Specifications shall be in CSI format.

h. Constructability Review

District and/or its designee, at its sole discretion, shall have the right to conduct a constructability review of the Construction Documents. A report shall be given to Architect who shall make necessary changes along with providing written comments for each item listed in the report. Conducting a constructability review does not excuse Architect's obligation to provide Services that shall comply with professional architectural standards, including the standard of care applicable to architects designing public school facilities and applicable requirements of federal, state, and local law.

i. Deliverables and Numbers of Copies

Within thirty (30) days of the end of this Phase, Architect shall provide to District a hard copy of the following items produced in this Phase, together with one (1) copy of each item in electronic format:

- (i) Working drawings;
- (ii) Specifications;
- (iii) Engineering calculations;
- (iv) Construction Cost Budgets;
- (v) Statement of requirements for testing and inspection of service for compliance with Construction Documents and applicable codes;
- (vi) Copy of DSA file including all correspondence, meeting, minutes or reports, back-check comments, checklists to date; and
- (vii) Statement indicating any authorized changes made to the design from the last Phase and the cost impact of each change on the previously approved Construction Cost Budget. If no design changes occur but shifts of costs occur between disciplines, identify for District review.

3. Construction Documents Final Back-Check Stage:

- a. The Construction Documents final back-check stage shall be for the purpose of Architect incorporating all regulatory agencies' comments into the drawings, specifications, and estimate. All changes made by Architect during this stage shall be at no additional cost to District.
- b. The final contract documents delivered to District upon completion of Architect's work shall be the Bid Set and shall consist of the following:
 - (i) Drawings: Original tracings of all drawings on Architect's tracing paper with each Architect/Consultant's State license stamp.
 - (ii) Specifications: Original word-processed technical specifications on reproducible masters in CSI format.
- c. Architect shall update and refine the Consultants' completed Contract Documents.
- d. Conclusion of Construction Document Phase requires final stamp-out by DSA.

4. Meetings

During this Phase, Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below in Section J.

G. BIDDING PHASE

Upon District's acceptance of Architect's work in the previous Phase and assuming District has not delayed or terminated the Agreement, Architect shall perform Bidding Phase services for District as follows:

1. Work with the District to modify or add to standard, special, or general conditions for contract documents that might be needed for unique Project or contract conditions, for District's approval, and/or assist in the development of documents necessary for the bidding phase.
2. The development of the bidding procedures and the construction Contract Documents shall be the joint responsibility of District and Architect. Nevertheless, Architect will use all due care and diligence to confirm that its plans and specifications and all other information provided by or on behalf of District to potential bidders discloses and publishes any potentially relevant information that could, in any way, have an impact on a Contractor's cost of performance.
3. Prepare public solicitation notices for District approval. Review, coordinate, and estimate cost of bid phase addenda.
4. Coordinate all bid phase activities with District departments. Conduct pre-bid conferences to familiarize bidders with the bidding documents, and any special systems, materials or methods and with Project procedures. Conduct job walks and bidders' conferences, maintain and prepare minutes of job walks or bidder's conferences. Field questions from bidders, referring questions to District as required. Respond to bidder questions by addenda.
5. While the Project is being advertised for bids, all questions concerning intent shall be referred to District for screening and subsequent processing through Architect.
6. In the event that items requiring interpretation of the drawings or specifications are discovered during the bidding period, those items shall be analyzed by Architect for decision by District as to the proper procedure required. Corrective action will be in the form of an addendum prepared by Architect and issued by District.
7. Attend bid opening.
8. Conduct post-bid conferences as required. Assist and advise regarding bid protests.
9. Conduct pre-award conferences with successful bidders.
10. Schedule and conduct preconstruction meetings. Maintain, prepare, and distribute minutes.
11. Assist with the preparation of agenda items for Board approval. Coordinate submittals required by governing agencies.
12. Coordinate with Consultants.

13. Deliverables and Number of Copies

Within thirty (30) days of the end of this Phase, Architect shall provide to District a hard copy of the following items produced in this Phase, together with one (1) copy of each item in electronic format:

- a. Meeting report/minutes from the kick-off meeting;
- b. Meeting report/minutes from the pre-bid site walk; and
- c. Upon completion of the Bidding Phase, Architect shall produce a Conforming Set of plans and specifications incorporating all addenda issued thus far. Architect shall supply District with two (2) complete, reproducible sets of plans and specifications marked as a Conforming Set.

H. CONSTRUCTION CONTRACT ADMINISTRATION PHASE

Upon District's acceptance of Architect's work in the previous Phase and assuming District has not delayed or terminated the Agreement, Architect shall perform Construction Contract Administration Phase services for District as follows:

1. Architect's responsibility to provide basic services for the Construction Phase under the Agreement commences with the award of the contract for construction and terminates upon satisfactory performance and completion of all tasks in this phase and commencement of the Closeout Phase or upon District's terminating the Agreement, whichever is earlier.
2. **General Construction Contract Administration Responsibilities**
 - a. Monitor schedule and cost information for Contractor. Document the progress and costs of the Project. Report and advise proactively on potential schedule and budget variances and impacts. Recommend potential solutions to schedule and cost problems. Work cooperatively with District and Contractor to ensure that Project is delivered on time and within budget. Review construction progress and prepare reports.
 - b. Verify permits, approvals, and schedules of values. Coordinate with DSA Project Inspector, and ensure compliance with all DSA reporting and closeout requirements. Submit necessary reports to state and local authorities.
 - c. Conduct construction meetings for the Project to discuss and resolve such matters as progress, quality and scheduling. Said meetings shall be weekly unless Project conditions do not require that frequency. Prepare and promptly distribute minutes. When required by field or other conditions, construction progress, or the quality of workmanship, conduct special construction meetings; record, prepare, and distribute minutes of these meetings to District and the affected construction Contractor.
 - d. Assist District in coordinating the services of special consultants and testing laboratories on the Project.
 - e. Monitor work of the construction Contractor to determine that the work is being performed in accordance with the requirements of the respective construction documents for the Project, including but not limited to the plans, specifications, addenda, and all other contract documents, as well as all applicable laws, regulations and directives of agencies with jurisdiction over any of the Project. As appropriate, make recommendations to District regarding special inspection or testing of work that is not in accordance with the provisions of the contract documents.
 - f. Prepare and distribute monthly project status reports for the Project including updates on project activities, progress of work, outstanding issues, potential problems, schedule, and status of RFIs, change orders, and submittals.

3. Construction Oversight and Project Certification Process

- a. Architect shall ensure that the Project Inspector is approved by the DSA for the Project by submitting the applicable Inspector's Qualification Record (form DSA 5 or more current version) to and by obtaining approval from the DSA prior to commencement of construction and prior to requesting issuance of project inspections cards (form DSA 152 or more current version).
- b. Architect shall request issuance of the proper number of project inspection cards (forms DSA 152 or more current version) by electronically submitting form DSA 102-IC (or more current version) to the DSA after the construction contract has been awarded. Architect shall provide project inspection cards to the Project Inspector prior to commencement of construction.
- c. Prior to commencement of construction, Architect shall provide (1) a copy of the DSA approved construction documents and (2) the DSA approved Statement of Structural Tests and Special Inspections (form DSA 103 or more current version) prepared by Architect to the Project Inspector and Laboratory of Record.
- d. Architect shall prepare and submit a Contract Information form (form DSA 102 or more current version) for all construction contracts.
- e. Architect shall maintain such personal contact with the Project as is necessary to assure themselves of compliance, in every material respect, with the DSA-approved construction documents. Personal contact shall include visits to the Project site by Architect or engineer or their qualified representative to observe construction.
- f. Architect shall notify DSA as to the disposition of materials noted on laboratory testing, and/or special inspection, reports as not conforming to the DSA-approved construction documents.
- g. Architect shall respond to DSA field trip notes as necessary.
- h. Architect shall submit an interim Verified Report (form DSA 6-AE or more current version) to the DSA electronically and a copy to the Project Inspector for each of the applicable nine (9) sections of form DSA 152 prior to the Project Inspector signing off that section of the project inspection card.
- i. Architect shall submit a Statement of Final Actual Project Cost (form DSA 168 or more current version) to the DSA.
- j. Architect shall submit Verified Reports (form DSA 6-AE or more current form) to the DSA and to the Project Inspector if any of the following events occur: (1) when construction is sufficiently complete in accordance with the DSA-approved construction documents so that District can occupy or utilize the Project; (2) work on the Project is suspended for a period of more than one month; (3) the services of Architect are terminated for any reason prior to completion of the Project; or (4) DSA requests a Verified Report.

4. Change Orders

- a. Architect shall review all of Contractor's change order requests to determine if those requests are valid and appropriate. Architect shall provide a recommendation to District as to whether the change should be approved, partially approved, returned to the Contractor for clarification, or rejected. Architect shall also determine cost and schedule effects of change orders. Prepare change order reports and maintain a change order log for the Project.
- b. Architect shall furnish all necessary Construction Change Documents and additional drawings for supplementing, clarifying, and/or correcting purposes and for change orders. District shall request these Construction Change Documents and drawings from Architect, which shall be provided at no additional cost unless designated as Extra Services by District. The original tracing(s) and/or drawings and contract wording for change orders shall be submitted to District for duplication and distribution.

5. Submittals

- a. Architect shall review and approve or take other appropriate action upon Contractor's submittals such as: shop drawings, Project data, samples and Construction Change Documents, but only for the purpose of checking for conformance with information given and the design concept expressed in the Contract Documents.
 - b. Architect shall review Contractor's schedule of submittals and advise District on whether that schedule is complete. Architect shall provide District with proposed revisions to this schedule and advise District on whether District should approve this schedule.
 - c. Architect's action upon Contractor's submittals shall be taken as expeditiously as possible so as to cause no unreasonable delay in the construction of the Project or in the work of Contractor(s), while allowing sufficient time in Architect's professional judgment to permit adequate review. In no case shall the review period associated with a single, particular submittal exceed twenty-one (21) calendar days from its receipt by Architect. Architect's response to each submittal shall be a substantive and acceptable response. This twenty-one (21)-day time period shall not include time when a submittal is within District's control or if the submittal is being reviewed by DSA. In no way does this provision reduce Architect's liability if it fails to prepare acceptable documents.
6. **RFIs.** During the course of construction as part of the basic services, Architect must respond to all Requests for Information ("RFI") as expeditiously as possible so as not to impact and delay the construction progress. In no case shall the review period associated with an RFI exceed seven (7) calendar days from receipt by Architect. Architect's response to each RFI shall be a substantive and acceptable response. This seven-day time period shall not include time when a submittal is within District's control or if the submittal is being reviewed by DSA. In no way does this provision reduce Architect's liability if it fails to prepare acceptable documents. Architect must verify that RFIs are passed through the Project Inspector, if any.

7. **Notices of Deficient Work.** On the basis of on-site observations, Architect shall keep District informed of the progress and the quality of the work, and shall endeavor to guard District against defects and deficiencies in the work. Architect shall timely notify District in writing of any defects or deficiencies in the work by any of District's Contractors that Architect may observe. However, Architect shall not be a guarantor of the Contractor's performance.
8. **As-Built Drawings.** Architect shall review and evaluate for District the Contractor(s)' documentation of the actual construction performed during the Project that the Contractor(s) should prepare and submit as As-Builts. As-Builts are documents that show the actual construction performed during the Project, including changes necessitated by Construction Change Documents and change orders, and detailed by District's construction Contractor(s) on a Conforming Set.
9. **Record Drawings.** Architect shall incorporate all information on all As-Builts, sketches, details, and clarifications, and prepare one (1) set of final Record Drawings for District. The Record Drawings shall incorporate onto one (1) set of drawings, all changes from all As-Builts, sketches, details, and clarifications, including, without limitation, all requests for information, Construction Change Documents and change orders based upon the construction Contractor's representations of actual construction. Architect shall deliver the Record Drawings to District at completion of the construction in a format acceptable to District, and it shall be a condition precedent to District's approval of Architect's final payment. Architect may insert the following notice on the Record Drawings:

These drawings [or corrected specifications] have been prepared based on information submitted, in part, by others. Architect has provided a review consistent with its legal standard of care.
10. **O&M Manuals and Warranties.** Architect shall review equipment, operation and maintenance manuals, and a complete set of warranty documents for all equipment and installed systems, to ensure that they meet the requirements of the plans and specifications.
11. **Start-up.** Architect shall also provide, at District's request, architectural/engineering advice to District on start-up, break-in, and debugging of facility systems and equipment, and on apparent deficiencies or defects in construction following the acceptance of the Contractor's work.
12. **Payment Statements.** Evaluate payment applications and verify progress. Recommendations of Payment by Architect constitute Architect's representation to District that work has progressed to the point indicated to the best of Architect's knowledge, information, and belief, and that the quality of the work is in general conformance with the Contract Documents.

13. Deliverables and Number of Copies

Within thirty (30) days of the end of this Phase, Architect shall provide to District a hard copy of the following items produced in this Phase, together with one (1) copy of each item in electronic format:

- a. Meeting report/minutes from the kick-off meeting;

- b. Observation reports; and
- c. Weekly meeting reports.

14.Meetings

During this Phase, Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below in Section J.

[REMAINDER OF PAGE LEFT INTENTIONALLY BLANK]

I. CLOSE OUT PHASE

1. As the Construction Administration Phase progresses, Architect shall perform the following Close Out Phase services for District as required in a timely manner:
 - a. Architect shall review the Project and observe the construction as required to determine when the Contractor has completed the construction of the Project and shall prepare punch lists of items that remain in need of correction or completion.
 - b. Architect shall collect from the Contractor, review, and forward to District all written warranties, operation manuals, and spare parts with Architect's recommendation as to the adequacy of these items.
 - c. Architect shall prepare or collect, as applicable, and provide to DSA, all reports required by DSA related to the design and construction of the Project.
 - d. Architect shall respond to the DSA "90-day" letter.
 - e. Architect shall obtain all required DSA approval of all Construction Change Documents and addenda to the Contractor's contract.
 - f. Architect shall prepare a set of As-Built Drawings for the Project, as required by District.
 - g. Architect shall review and prepare a package of all warranty and O&M documentation.
 - h. Architect shall organize electronic files, plans and prepare a Project binder.
 - i. Architect shall have primary responsibility to coordinate all Services required to close-out the design and construction of the Project with District and among Consultants.
2. When the design and construction of the Project is complete, District shall prepare and record with the County Recorder a Notice of Completion for the Project.

3. Deliverables and Number of Copies

- a. Punch list; and
- b. Upon completion of the Project, all related Project documents, including As-Builts and Record Drawings. These are the sole property of District.

4. Meetings

During this phase, Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below in Section J.

J. MEETINGS / SITE VISITS / WORKSHOPS

1. Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below. Architect shall chair, conduct and take minutes of all coordination meetings with its Consultant(s) during the entire design phase. Architect shall invite District and/or its representative to participate in these meetings. Architect shall keep a separate log to document design/coordination comments generated in these meetings.

2. General Meeting, Site Visit, and Workshop Requirements

- a. Architect shall always be prepared to answer questions and issues from District staff, site staff, potential bidders, and/or Contractors, as applicable.
- b. Architect shall maintain a log of all meetings, site visits or site observations held in conjunction with the design and construction of the Project, with documentation of major discussion points, observations, decisions, questions or comments. These shall be furnished to District and/or its representative for inclusion in the overall Project documentation.
- c. As required, Architect shall provide at no additional cost to District copies of all documents or other information needed for each meeting, site visit, and workshop.
- d. Each meeting may last up to a full day (eight (8) hours) and shall be held at District office or at the Project site, unless otherwise indicated.

3. Meetings During Project Initiation Phase (____ (__) meeting(s))

- a. Within the first week following execution of the Agreement, Architect shall participate in one (1) Project kick-off meeting to determine the Project intent, scope, budget and timetable, which shall encompass the following:
 - (i) Architect, its appropriate consultant(s), and District staff, shall attend the meeting.
 - (ii) The Project kick-off meeting will introduce key team members from District and Architect to each other, defining roles and responsibilities relative to the Project.
 - (iii) During this meeting, Architect shall:
 - (A) Identify and review pertinent information and/or documentation necessary from District for the completion of the Project.
 - (B) Review and explain the overall Project goals, general approach, tasks, work plan and procedures and deliverable products of the Project.
 - (C) Review and explain the scope of work and Project work plan for all parties present; determine any adjustments or fine tuning that needs to be made to the work plan.

(D) Review documentation of the Project kick-off meeting prepared by District's representative and comment prior to distribution.

b. Architect shall participate in ___ (__) meeting(s) as requested by District.

4. Initial Site Visits (___ (__) meeting(s))

a. Architect shall visit the Project site to complete a visual inventory and documentation of the existing conditions.

5. Meetings During Architectural Program (___ (__) meeting(s))

a. Architect shall conduct _____ (__) site visit/meeting(s) with District's facilities team to gather information from District facilities team and site personnel and to make a visual presentation regarding the Project.

b. Electrical, civil, mechanical, structural, landscaping, and estimating consultant(s) shall participate in these meetings as appropriate and shall provide input and feedback into the development of the Construction Cost Budget.

c. Architect shall conduct a minimum of __ (__) additional meetings as requested by District.

6. Meetings During Schematic Design Phase (___ (__) meeting(s))

a. Within the first two weeks following the start of the Schematic Design Phase, Architect shall conduct ___ (__) design workshop[s] with District's facilities team and site personnel to complete a basic design framework with computer-aided design equipment ("CADD"). District may, at its discretion, allow Architect to proceed with this meeting without using CADD. This workshop shall be ongoing and may include several meetings and shall not be concluded until each attendee has indicated his or her acceptance with Architect's preliminary design. This workshop shall include the following:

(i) Architect shall designate its team member duties and responsibilities.

(ii) Architect and District shall review District goals and expectations.

(iii) District shall provide input and requirements.

(iv) Architect and District shall review Project scope and budget, including the Construction Cost Budget and the Construction Budget.

(v) Prepare and/or revise the scope of work list and general work plan from the Pre-Design Phase, for documentation in a computer-generated Project schedule.

(vi) Establish methods to facilitate the communication and coordination efforts for the Project.

b. Architect shall participate in _____ (__) meeting(s) as requested by District.

7. Meetings During Design Development Phase (_____ (__) meeting(s))

- a. At the time designated for completion of the Design Development package, Architect shall conduct _____ (__) meeting[s], per package or submittal, with District to review the following:
 - (i) Present the Design Development package for review and comment to proceed with preparation of final plans and specification.
 - (ii) Architect and District shall review Project scope and budget, including the Construction Cost Budget and the Construction Budget.

- b. **Value Engineering Workshop (_____ (__) meeting(s))**
 - (i) Architect shall conduct value engineering workshop(s), as requested by District, which shall include all of Architect's Consultant(s), and District during the Design Development Phase. This workshop shall be ongoing and may include several meetings.

8. Meetings During Construction Documents Phase (_____ (__) meeting(s))

- a. Prior to beginning work on the fifty percent (50%) design package, Architect shall conduct _____ (__) meeting(s), per package or submittal, with District to revise the Design Development package and receive comments.

- b. At the time designated for completion of the fifty percent (50%) submittal package, Architect shall conduct _____ (__) meeting(s), per package or submittal, with District to review the following:
 - (i) Present the fifty percent (50%) submittal package for review and comment to proceed with preparation of final plans and specifications.
 - (ii) Architect and District shall provide further review of Project scope and budget, including the Construction Cost Budget and the Construction Budget.

- c. At the time designated for completion of the one hundred percent (100%) Construction Document package, Architect shall conduct _____ (__) meeting(s), per package or submittal, with District to review the following:
 - (i) Present the hundred percent (100%) Construction Document package for review and comment to proceed with preparation of final plans and specifications.
 - (ii) Architect and District shall provide further review of Project scope and budget, including the Construction Cost Budget and the Construction Budget.

9. Meetings During Bidding Phase (_____ (__) meeting(s))

- a. Attend and take part in _____ (__) meeting(s), per package or submittal, with all potential bidders, and District staff.

- b. Conduct _____ (__) kick-off meeting(s) with the successful bidder, and District staff to finalize the roles and responsibilities of each party and provide protocols and processes to follow during construction.

10. Meetings During Construction Administration Phase (weekly Project meetings until entire Project is complete)

- a. Architect shall visit the Project site as necessary or when requested, and in no case less than once per week, sufficient to determine that the Project is being constructed in accordance with the plans and specifications, and to resolve discrepancies in the Contract Documents and to monitor the progress of the construction of the Project.
- b. Conduct weekly Project meetings with District staff to review with District staff the progress of the work. Architect agrees to attend weekly Project meetings, at no additional cost to District, until the work of the Project is complete.
- c. Architect shall ensure that Consultant(s) visit the site in conformance with their agreement(s) and that Consultant agreements shall reference District requirements for Construction Phase services.

11. Citizens' Bond Oversight Committee Meetings (_____ (____) meeting(s)) (if applicable)

Architect acknowledges that the design and construction of the Project is subject to oversight by District's citizen bond oversight committee. Architect shall, at District's direction, attend District citizen bond oversight committee meeting(s) and present Architect's design to District's citizen bond oversight committee for review.

12. Governing Board Meetings (_____ (__) meeting(s))

Architect acknowledges that District's Governing Board must approve all designs. Architect shall, at District's direction, attend District Governing Board meeting(s) and present Architect's design to District's Governing Board for review and approval.

END OF EXHIBIT