


Board Office Use: Legislative File Info.	
File ID Number	13-0530
Committee	Facilities
Introduction Date	3-27-2013
Enactment Number	13-0588
Enactment Date	3/27/13



OAKLAND UNIFIED
SCHOOL DISTRICT

Community Schools, Thriving Students

Memo

To Board of Education 

From Tony Smith, Ed.D., Superintendent
Timothy White, Associate Superintendent, Facilities Planning and Management

Board Meeting Date March 27, 2013

Subject Amendment No. 1, Purchase Order - KW Engineering- Retro Commissioning Project

Action Requested Approval by the Board of Education of Amendment No. 1, Purchase Order with KW Engineering for Retro Commissioning Services on behalf of the District at Division of Facilities, Planning and Management Project, in an amount not-to exceed \$6,256.00 increasing previous contract amount from \$32,720.00 to a not to exceed amount of \$38,976.00 and revising the end date from December 1, 2011 through August 16, 2012 to June 30, 2013. All remaining portions of the agreement shall remain in full force and effect as originally stated.

Background This control system is used in all the other district high schools.

Local Business Participation Percentage 100.00%

Strategic Alignment Among the key purposes of the District's Facilities Master Plan is to provide an academic environment for the Oakland community that will give every student, educator, and community member using our facilities the best possible opportunity for learning.

Through implementation of the Facilities Master Plan, the District intends to improve the District's facilities in terms of structural integrity, safety, reliability of operating (mechanical) systems, access to modern resources,



number and type of appropriate laboratories and specialized instruction rooms, opportunities for physical education, and attractiveness, such that the Oakland Public Schools are second to none. Operation of the District schools under the planned approach is intended to ensure safety, cleanliness, and orderliness for all individuals participating in the learning process.

The basic facility needs of students such as proper lighting, functional roofs, noise control and well maintained buildings, not only convey the message that we value our students and teachers but may foster a sense of school pride and community ownership which may improve attitudes towards learning. The implementation of the Facilities Master Plan is our first step in that direction.

Recommendation

Approval by the Board of Education of Amendment No. 1, Purchase Order with KW Engineering for Retro Commissioning Services on behalf of the District at Division of Facilities, Planning and Management Project, in an amount not-to exceed \$6,256.00 increasing previous contract amount from \$32,720.00 to a not to exceed amount of \$38,976.00 and revising the end date from December 1, 2011 through August 16, 2012 to June 30, 2013. All remaining portions of the agreement shall remain in full force and effect as originally stated.

Fiscal Impact

Measure B

Attachments

- Independent Contractors Agreement including scope of work

**AMENDMENT NO. 1 TO
PURCHASE ORDER**

File ID Number: 13-0530
 Introduction Date: 3/27/13
 Enactment Number: 13-0588
 Enactment Date: 3/27/13
 By: o/s

This Amendment is entered into between the Oakland Unified School District (OUSD) and **Kw Engineering**. OUSD entered into an Agreement with CONTRACTOR for services on December 1, 2012 and the parties agree to amend that Agreement as follows:

1. **Services:** The scope of work is unchanged. The scope of work has changed.

If scope of work changed: Provide brief description of revised scope of work including description of expected final results, such as services, materials, products, and/or reports; attach additional pages as necessary. Attach revised scope of work.

The CONTRACTOR agrees to provide the following amended services: The scope consists of upgrading the boiler controls to an Alerton EMS at Castlemont, McClymonds and Oakland Technical high schools. Also Specifications, Bid Phase and Commissioning is included in the price for this project.

2. **Terms (duration):** The term of the contract is unchanged. The term of the contract has changed.

If term is changed: The contract term is extended by an additional Ten months, and the amended expiration date is June 30, 2013.

3. **Compensation:** The contract price is unchanged. The contract price has changed.

If the compensation is c hanged: The contract price is amended by

- Increase of \$6,256.00 to original contract amount
- Decrease of \$ _____ to original contract amount

and the new contract total is Thirty-eight thousand, nine hundred seventy-six dollars and no cents (\$38,976.00)

4. **Remaining Provisions:** All other provisions of the Agreement, and prior Amendment(s) if any, shall remain unchanged and in full force and effect as originally stated.

5. **Amendment History:**

There are no previous amendments to this Agreement. This contract has previously been amended as follows:

No.	Date	General Description of Reason for Amendment	Amount of Increase (Decrease)
			\$
			\$
			\$

6. **Approval:** This Agreement is not effective and no payment shall be made to Contractor until it is approved. Approval requires signature by the Board of Education, and the Superintendent as their designee.

OAKLAND UNIFIED SCHOOL DISTRICT

CONTRACTOR

David Kakashiba, President of the Board

Date

3/28/13

Contractor Signature

Date

3/22/2013

Edgar Rakestraw, Jr., Secretary
Board of Education

Date

3/28/13

Print Name, Title

Timothy White, Associate Superintendent
Facilities, Planning and Management

Date

EXHIBIT "A" Scope of Work

Contractor Name:

Billing Rate: Six thousand, two hundred fifty-six dollars and no cents (\$6,256.00)

1. Description of Services to be Provided

Upgrade of boiler systems in three high schools.

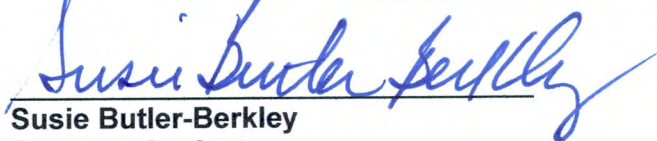
2. Specific Outcomes:

The upgraded boilers will provide a better system for the staff and students.

3. Alignment with District Strategic Plan: Indicate the goals and visions supported by the services of this contract:

<input type="checkbox"/> Ensure a high quality instructional core	<input type="checkbox"/> Prepare students for success in college and careers
<input checked="" type="checkbox"/> Develop social, emotional and physical health	<input checked="" type="checkbox"/> Safe, healthy and supportive schools
<input checked="" type="checkbox"/> Create equitable opportunities for learning	<input checked="" type="checkbox"/> Accountable for quality
<input type="checkbox"/> High quality and effective instruction	<input type="checkbox"/> Full service community district

Oakland Unified School District or the District verifies that the Contractor does not appear on the Excluded Parties List at www.epls.gov/epls/search.do.


Susie Butler-Berkley
Contract Analyst



February 13, 2013

Oakland Unified School District
Facilities Planning and Management
Attn: Richard Rogers
955 High Street
Oakland, CA 94601

Dear Mr. Rogers:

Attached is our invoice for services performed during **July-August 2012** for the Retrocommissioning Implementation Support project for the Oakland Unified School District, under Purchase Order Number P1204633 and Vendor Number V060571.

kW staff performed work on the following sub tasks associated with Task 3: Commissioning:

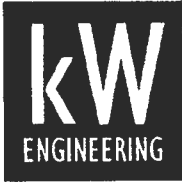
- Communications with OUSD staff
- Communication with contractors
- Review Sequence of Operation
- Commissioning services.

Please do not hesitate to contact me if you have any questions or need additional information

Sincerely,

A handwritten signature in blue ink, appearing to read 'Bruce Chamberlain', with a long horizontal line extending to the right.

Bruce Chamberlain
Enclosure: Invoice



kW Engineering, Inc.
287 17th Street
Suite 300
Oakland, CA 94612

Oakland U.S.D.
Facilities Planning & Management
Attn: Richard Rogers
955 High Street
Oakland, CA 94601

OUSD High Schools
RCx Implementation Support
PO # P1204633
Vendor ID# V060571

February 14, 2013
Project No: 2236-12A
Invoice Number 4293

Services Performed During July 01, 2012 to August 31, 2012
Professional Personnel

	Hours	Rate	Amount	
Project Manager				
Chamberlain, Bruce	10.00	152.00	1,520.00	
Rottmayer, Steve	20.00	152.00	3,040.00	
Senior Engineer II				
Gomes, Lyn	10.00	147.00	1,470.00	
Schoenfeld, Jonathan	1.50	147.00	220.50	
Totals	41.50		6,250.50	
Total Labor				6,250.50
		Total this Invoice		\$6,250.50

ACORD™ CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
02/21/2013


PRODUCER Dealey, Renton & Associates P. O. Box 12675 Oakland, CA 94604-2675 510 465-3090	THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.	
	INSURERS AFFORDING COVERAGE	NAIC #
INSURED Kilowatt Engineering, Inc dba: KW Engineering 287 17th Street, Suite 300 Oakland, CA 94612	INSURER A: Hartford Casualty Insurance Co.	
	INSURER B: Travelers Property Casualty Ins	
	INSURER C: U.S. Specialty Insurance Compan	
	INSURER D:	
	INSURER E:	

COVERAGES

THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. AGGREGATE LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR ADD'L LTR	INSRD	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS	
A		GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC	57SBAKD1700	01/07/13	01/07/14	EACH OCCURRENCE	\$2,000,000
						DAMAGE TO RENTED PREMISES (Ea occurrence)	\$300,000
						MED EXP (Any one person)	\$10,000
						PERSONAL & ADV INJURY	\$2,000,000
						GENERAL AGGREGATE	\$4,000,000
						PRODUCTS - COMP/OP AGG	\$4,000,000
A		AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	57SBAKD1700	01/07/13	01/07/14	COMBINED SINGLE LIMIT (Ea accident)	\$2,000,000
						BODILY INJURY (Per person)	\$
						BODILY INJURY (Per accident)	\$
						PROPERTY DAMAGE (Per accident)	\$
		GARAGE LIABILITY <input type="checkbox"/> ANY AUTO				AUTO ONLY - EA ACCIDENT	\$
						OTHER THAN AUTO ONLY: EA ACC	\$
						AGG	\$
A		EXCESS/UMBRELLA LIABILITY <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> DEDUCTIBLE <input checked="" type="checkbox"/> RETENTION \$ 10000	57SBAKD1700	01/07/13	01/07/14	EACH OCCURRENCE	\$1,000,000
						AGGREGATE	\$1,000,000
							\$
							\$
							\$
B		WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? If yes, describe under SPECIAL PROVISIONS below	UB4033T115	02/28/13	02/28/14	<input checked="" type="checkbox"/> WC STATU-TORY LIMITS <input type="checkbox"/> OTH-ER	
						E.L. EACH ACCIDENT	\$1,000,000
						E.L. DISEASE - EA EMPLOYEE	\$1,000,000
						E.L. DISEASE - POLICY LIMIT	\$1,000,000
C		OTHER Professional Liability	USS1222807	04/02/12	04/02/13	\$1,000,000 per claim	\$1,000,000 annl aggr.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES / EXCLUSIONS ADDED BY ENDORSEMENT / SPECIAL PROVISIONS
 General Liability Excludes Claims Arising Out of the Performance of Professional Services.
 All operations of the named insured. Oakland Unified School District is named as Additional Insured's to General Liability per policy form wording.

CERTIFICATE HOLDER Oakland Unified School District 955 High Street Oakland, CA 94601-0000	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL <u>30</u> DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES. AUTHORIZED REPRESENTATIVE 
---	--

Insured: Kilowatt Engineering, Inc
Insurer: Hartford Casualty Insurance Co.
Policy Number: 57SBAKD1700
Policy Effective Date: 01/07/13

Additional Insured:

EXCERPTS FROM: Hartford Form SS 00 08 04 05

BUSINESS LIABILITY COVERAGE FORM

C. WHO IS AN INSURED

6. Additional Insureds When Required By Written Contract, Written Agreement Or Permit

The person(s) or organization(s) identified in Paragraphs a. through f. below are additional insureds when you have agreed, in a written contract, written agreement or because of a permit issued by a state or political subdivision, that such person or organization be added as an additional insured on your policy, provided the injury or damage occurs subsequent to the execution of the contract or agreement, or the issuance of the permit. A person or organization is an additional insured under this provision only for that period of time required by the contract, agreement or permit.

f. Any Other Party

(1) Any other person or organization who is not an insured under Paragraphs a. through e. above, but only with respect to liability for "bodily injury, "property damage" or "personal and advertising injury" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf:

- (a) In the performance of your ongoing operations;
- (b) In connection with your premises owned by or rented to you; or
- (c) In connection with "your work" and included within the "products- completed operations hazard, but only if
 - (i) The written contract or written agreement requires you to provide such coverage to such additional insured; and
 - (ii) This Coverage Part provides coverage for "bodily injury" or "property damage" included within the "products-completed operations hazard.

(2) With respect to the insurance afforded to these additional insureds, this insurance does not apply to: "Bodily injury, "property damage" or "personal and advertising injury" arising out of the rendering of, or the failure to render, any professional architectural, engineering or surveying services, including: inspection, or engineering

E.5. Separation of Insureds

Except with respect to the Limits of Insurance, and any rights or duties specifically assigned in this policy to the first Named Insured, this insurance applies:

- a. As if each Named Insured were the only Named Insured; and
- b. Separately to each insured against whom a claim is made or "suit" is brought.

E.7.b.(7).(b) Primary And Non-Contributory To Other Insurance When Required By Contract

If you have agreed in a written contract, written agreement or permit that this insurance is primary and non-contributory with the additional insured's own insurance, this insurance is primary and we will not seek contribution from that other insurance.

E.8.b. Waiver Of Rights Of Recovery (Waiver Of Subrogation)

If the insured has waived any rights of recovery against any person or organization for all or part of any payment, including Supplementary Payments, we have made under this Coverage Part, we also waive that right, provided the insured waived their rights of recovery against such person or organization in a contract, agreement or permit that was executed prior to the injury or damage.

EXCERPT FROM Hartford Form SS 04 38 06 01

HIRED AUTO AND NON-OWNED AUTO

B. With respect to the operation of a "non-owned auto", WHO IS AN INSURED is replaced by the following:
The following are "insureds":

- d. Anyone liable for the conduct of an "insured", but only to the extent of that liability.

Board Office Use: Legislative File Info.	
File ID Number	11-2527
Committee	Facilities
Introduction Date	12-6-2011
Enactment Number	11-2527
Enactment Date	12-14-11



OAKLAND UNIFIED
SCHOOL DISTRICT

Memo

To Board of Education

From Tony Smith, Ed.D., Superintendent
Timothy White, Assistant Superintendent, Facilities Planning and Management

Board Meeting Date December 14, 2011

Subject Division of Facilities Planning and Management P.O. Less than \$50,000.00

Action Requested: Ratification by the Board of Education of the attached contracts for the Division of Facilities Planning and Management.

File ID	Vendor Name	\$	Funding Source	Type	Site	Period	City
11-3006	911 Restoration	\$41,725.89	GO Bond-Measure A	P.O.	Claremont Landscaping	6-28-2011 thru 8-27-2011	Richmond
11-3007	ABC School Equipment	\$355.00	GO Bond-Measure B	P.O.	Jefferson New Building	9-16-2011	Corona
11-3008	Alarcon Bohm	\$7,949.13	Special Reserve Fund	P.O.	Claremont HVAC Replacement	9-27-2011	Oakland
11-3009	Alcal Specialty Contracting, Inc.	\$1,925.00	GO Bond-Measure B	P.O.	Madison Modernization (HVAC)	9-15-2011 thru 12-31-2011	Fremont
11-3010	AON	\$3,500.00	Special Reserve Fund	P.O.	La Escuelita Educational Complex	9-26-2011 thru 10-26-2011	Concord
11-3011	BT Mancini	\$881.00	GO Bond-Measure B	P.O.	Oakland HS Mod	12-1-2011 thru 3-30-2011	Milpitas
11-3012	Campus Security Solutions	\$4,921.08	GO Bond-Measure B	P.O.	Prescott ES Mod	10-21-2011 thru 12-31-2011	Campbell
11-3013	Chussy International	\$370.00	GO Bond-Measure A	P.O.	Division of Facilities, Planning and Management	9-21-2011 thru 9-21-2011	Oakland
11-3014	Energy Systems	\$1,950.00	Country School Facilities	P.O.	Downtown Educational Complex Relocation	9-30-2011 thru 9-30-2012	Stockton
11-3015	Graybar	\$2,958.66	GO Bond-Measure B	P.O.	Frick Wellness Center	9-26-2011 thru 9-30-2011	Dublin
11-3016	Janakes Electric Inc.	\$5,200.00	Special Reserve Fund	P.O.	Claremont HVAC Replacement	8-25-2011 thru 9-1-2011	Redwood City
11-3017	Kam Yan and	\$4,500.00	County School	P.O.	Carter	9-1-2011	Oakland



OAKLAND UNIFIED
SCHOOL DISTRICT

	Associates		Facilities Fund		Baseball Scoreboard	thru 6-30- 2012	
11-3018	KW Engineering	\$32,720.00	GO Bond-Measure B	P.O.	Division of Facilities, Planning and Management	12-1-2011 thru 3-31- 2012	Oakland
11-3019	Noodle, Inc.	\$1,819.00	GO Bond-Measure B	P.O.	Oakland HS Health	8-12-2010 thru 8-31- 2011	Oakland
11-3020	North American Fence & Supply, Inc.	\$9,461.00	GO Bond-Measure B	P.O.	Havenscourt Interim Dining	8-30-2011 thru 12-31- 2011	Oakland
11-3021	Polk Communications	\$2,775.00	GO Bond-Measure A	P.O.	Claremont MS Landscaping	8-21-2011 thru 11-30- 2011	Oakland
11-3022	ServeSmart	\$3,275.00	GO Bond-Measure B	P.O.	Oakland HS Mod	10-1-2011 thru 10-31- 2011	El Cajon
11-3024	Sterling Environmental Corp.	\$21,160.00	Special Reserve Fund	P.O.	Claremont HVAC Replacement	7-15-2011 thru 7-22- 2011	Oakland
11-3026	Tot Turf	\$32,000.00	Special Reserve Fund	P.O.	Melrose Play Structure Repair	9-15-2011 thru 12-31- 2011	Oakland
11-3027	Tri-Net & McNamara Services Co.	\$8,412.31	GO Bond-Measure B	P.O.	Elmhurst MS Modernizatio n- Auditorium	9-29-2011 thru 12-31- 2011	Los Gatos
11-3028	Tri-Net & McNamara Services Co.	\$3,504.92	GO Bond-Measure B	P.O.	Madison MS Health Center	9-19-2011 thru 12-31- 2011	Los Gatos

Discussion:

Among the key purposes of the District's Facilities Master Plan is to provide an academic environment for the Oakland community that will give every student, educator, and community member using our facilities the best possible opportunity for learning.

Through implementation of the Facilities Master Plan, the District intends to improve the District's facilities in terms of structural integrity, safety, reliability of operating (mechanical) systems, access to modern resources, number and type of appropriate laboratories and specialized instruction rooms, opportunities for physical education, and attractiveness, such that the Oakland Public Schools are second to none. Operation of the District schools under the planned approach is intended to ensure safety, cleanliness, and orderliness for all individuals participating in the learning process.

The basic facility needs of students such as proper lighting, functional roofs, noise control and well maintained buildings, not only convey the message that we value our students and teachers but may foster a sense of school pride and community ownership which may improve attitudes towards learning. The implementation of the Facilities Master Plan is our first step in that direction.

Fiscal Impact:

Various

Recommendation:

The Board of Education is requested to approve the Facilities Planning and Management to OUSD school sites.



OAKLAND UNIFIED
SCHOOL DISTRICT

OAKLAND UNIFIED SCHOOL DISTRICT
 Department of Facilities Planning & Management

AGREEMENT REQUEST FORM

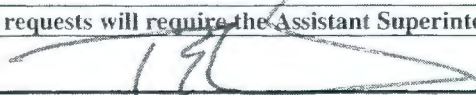

DATE SUBMITTED: 10.10.2011 SUBMITTED BY: Randy Horn

SECTION I. TYPE OF AGREEMENT (PLEASE CHECK ONE BOX)

<input checked="" type="checkbox"/> 1) A&E (Architects and Engineers) Contract	<input checked="" type="checkbox"/> X	<input type="checkbox"/> 5) "Small"(under \$15,000.00) Construction Contract	<input type="checkbox"/>
<input type="checkbox"/> 2) IOR (Inspector of Record) Contract	<input type="checkbox"/>	<input type="checkbox"/> 6) Resolution Awarding Bid & Construction Contract	<input type="checkbox"/>
<input type="checkbox"/> 3) Agreement for Professional Services-Testing Etc.	<input type="checkbox"/>	<input type="checkbox"/> 7) Change Order	Vendor Number: _____ Fiscal Year: <u>2011-2012</u>
<input type="checkbox"/> 4) Amendment to Agreement for Professional Services (Amendment #--)	<input type="checkbox"/>	<input type="checkbox"/> 8) Purchase Order	P.O. Under \$50K: _____ Date Processed: <u>10-24-2011</u> To: MB: <u>24</u> To DR: _____

SECTION II LOCAL BUSINESS PARTICIPATION PERCENTAGE

Local Business	Small Local Business	Small Local Resident Business	Total Percentage
100%			100%

All requests will require the Assistant Superintendent's and the Director of Facilities Authorization and Signature			
			
Timothy E. White	Date	Tadashi Nakadegawa	Date
Assistant Superintendent		Director of Facilities	<u>10/11/11</u>

SECTION III. AGREEMENT INFORMATION:

Project Name:	Retro-Commissioning Project	Project No:	07144 <u>9189901891</u>
Vendor Name:	Kw Engineering	Vendor Contact:	Steve Roumayer <u>6215</u>
Vendor Phone Number:	510.834.6420	Vendor Mailing Address:	287 17 th St. Ste. 300, Oakland, Ca 94612
Agreement Start & Stop Dates:	Start: 12.1.2011 Stop: 3.30.2012	Amounts:	Current Contract Amount: \$0 Not to Exceed Amount: \$32,720 Revised Contract Amount:
Has Work Started?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> X If yes give an explanation:	Has Work Been Completed?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> X
Certificate of Insurance Attached	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Date provided:	

For Construction Contracts \$15,000, please provide or attach the following:


- | | |
|--|--|
| 1) Number of Bids Received, List of Bidders and Amounts (Bid Form) <i>(Attach Bid Documents)</i> | <u>10-24-2011</u> |
| 2) Date(s) of Bid Advertisement | 6) Performance Bonds Attached |
| 3) Date of Bid Opening | 7) Payment Bonds Attached |
| 4) Name of Architect | 8) Number of Phases |
| 5) Liquidated damages per day | (Sections 6 & 7 to be completed by Contract Administration department) |

Scope of Work: kw Engineering will provide scope of work & specifications, bid phase review and commissioning to complete All projects.

Discussion Information: kw Engineering is providing implementation support for the 2009 PG & E retro-commissioning Projects at McClymonds, Oakland Technical High and Castlemont High Schools.

Funding Source
 File ID No. 11-3018
 Introduction Date 12-6-2011
 Enactment No. 11-2527
 Enactment Date 12-14-11

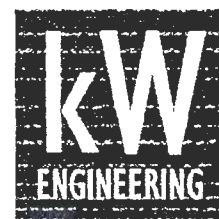
109643
 CA 94601
 2011 12 11 10 50
 DEPARTMENT OF FACILITIES PLANNING

Certified:

 Edger Rakestraw, Jr., Secretary
 Board of Education

Proj. # 07144

**Proposal to Provide
Implementation Support for 2009 PG&E
Retro-commissioning project at McClymonds,
Technical, and Castlemont High Schools**

Submitted to Oakland Unified School District,
Facilities Planning and Management
August 9th, 2011



287 17th Street, Suite 300
Oakland, CA 94612
(510) 834-6420
www.kw-engineering.com

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1.0 Overview

kW Engineering is pleased to present this proposal to support Oakland Unified School District (OUSD) with implementation of the 2009 retro-commissioning project conducted at three high schools under PG&E's core Retro-commissioning program. Recommendations resulting from the retro-commissioning (RCx) project were presented to OUSD in January of 2010.

This proposal is to provide Scope of Work documentation, Performance Specification documentation and Commissioning Services to support the implementation of the 2009 RCx project.

The RCx effort focused on the heating hot water, steam, and air distribution systems at the following high schools:

- Technical High School
- Mclymonds High School
- Castlemont High School

2.0 Project Scope

kW Engineering proposes to prepare a Scope of Work and Performance Specification for the measures identified in the 2009 PG&E Core RCx Findings Report. We will develop these documents for use as part of a Request for Proposal to send to contractors who can implement the measures. kW Engineering also proposes to provide OUSD with Commissioning Services to insure that the savings and incentives documented in the report are achieved.

The measures to be included in the scope of work include:

Technical High School:

1. Use BAS to Schedule AHU Fans and Optimize AHU Supply and Return Fan VFD Control
 - Balance air distribution system including terminal units
 - Connect supply fan and return fan to the existing building automation system and reschedule
2. Optimize Boiler Staging
 - Install automated isolation valves on boilers so that boilers can be isolated from heating hot water loop
 - Connect isolation valves to existing BAS
3. Hot Water Pump Control
 - Fix pump scheduling control including optimized start routine
 - Fix outside air lockout control
4. Check distribution system and remove pressure restrictions
5. Rebalance Hot Water Distribution System

Castlemont High School

1. Optimize Boiler Staging
 - Install automated isolation valves on boilers so that boilers can be isolated from heating hot water loop
 - Connect isolation valves to existing BAS
 - Enable boilers according to following schedule with existing building automation system

Lockout when Outside Air Temperature (°F) >	
Boiler #1	62
Boiler #2	65
Boiler #3	68

2. Hot Water Pump Control
 - o Fix pump scheduling control including optimized start routine
3. Check distribution system and remove pressure restrictions
4. Rebalance Hot Water Distribution System

McClymonds High School:

- 1) Conduct boiler tune up on Boiler 1, 2, and 3 so that boilers operate at rated efficiency
- 2) Optimize Boiler Staging
 - a. Install automated isolation valves on boilers so that boilers can be isolated from heating hot water loop
 - b. Connect isolation valves to existing BAS
 - c. Lockout and stage boilers according to outside air temperature
- 3) Replace Broken Thermostats & Steam Valves
 - a. Conduct survey of all thermostats and steam valves
 - b. Replace as required

3.0 Engineering Services

kW Engineering proposes the following engineering services for the proposed scope of work

Task 1: Scope of Work and Specifications

kW Engineering will use the 2009 RCx Findings report to create a scope of work and performance specifications suitable for bidding purposes to the design/build controls contractor. The controls contractor will act as the engineer of record and will likely sub-contract the required balancing and boiler tune up work. Detailed point-to-point design drawings, sequence of operations and points list will be developed by the controls contractor and reviewed by kW Engineering.

kW Engineering will begin by scheduling a Kickoff Meeting between OUSD and kW staff. The goal of this meeting will be to review the measures and discuss potential implementation issues prior to developing the scope of work and completing the bid walkthroughs with controls contractor(s).

At this stage, measures in the scope of work that may come in contact with hazardous materials should be noted. kW Engineering will support this effort, but OUSD will be responsible for identifying areas of concern. Hazardous material issues should be identified in the scope of work to reduce potential change orders.

kW Engineering's design package will include the following:

- Scope of Work document
- Commissioning Requirements and Specifications

All documents will be provided in MS word.

Task 2: Bid Phase

kW Engineering will support OUSD during the bidding phase of the project. This work includes participating in the onsite pre-bid meeting(s) at the three high schools with contractor(s) to answer questions about the scope of work and also incorporate any feedback from the contractors. Following the bid walkthrough, kW will be available to answer any follow-up questions that the controls contractors may have.

kW Engineering has budgeted time to review three contractor bids for each school and provide comments about the bids satisfying the scope of work and specification requirements. At the request of OUSD, we can also provide feedback concerning the costs, however, our understanding is that OUSD will make the final cost review and award the bids.

Task 3: Commissioning

We will prepare a commissioning (Cx) plan during the design phase and include it as part of the bid package so that the controls contractor bids include the cost of participating in the commissioning process. The plan will include definitions of roles and responsibilities as well as the lines of communication.

After construction is complete, we will perform a site walkthrough with the controls contractor to verify installation of equipment and controls sequences. This walkthrough will include supervision of functional performance tests performed by the controls contractor and



collection of field data (including logging) to verify the sequences of operation. kW Engineering will develop a punch list of items as needed to satisfy the design intent of the measures. We will also review the O&M manuals and verify that training has been provided by the controls contractor. At the end of the commissioning, we will prepare a commissioning report and will review it with the OUSD at a final Handoff Meeting.

Specific deliverables for a project of this size typically include:

- Commissioning Plan
 1. Pre-functional test procedures
 2. Functional Performance Test Results
 3. Trending requirements
- Punchlist of deficiencies, as needed, and subsequent resolutions
- Final Commissioning Report

4.0 Cost Proposal and Schedule

This section includes our proposed costs, anticipated completion time and clarifications and assumptions for this work.

Costs

kW Engineering proposes to complete the tasks described in this proposal on a time and material basis with the following estimates for each.

Task 1	Scope of Work and Specifications	\$12,352
Task 2	Bid Phase	\$8,080
Task 3	Commissioning	\$12,288
Total		\$32,720

Schedule

The schedule depends largely on when the project begins and the timing of key meetings and notices to proceed. The following table includes an estimate of the completion time for each task.

Task 1	Scope of Work and Specifications	30 days from Kickoff Meeting
Task 2	Bid Phase	45 days
Task 3	Commissioning	45 days from installation completion

Note: all days are business days.

Clarifications and Assumptions

- 1) Requested services outside the scope of work are available at the following billing rates:

kW Engineering - 2011 Rates	
Employment Category	Current Rate
Principal	\$ 189.00
Project Manager	\$ 152.00
Senior Engineer II/Consultant II	\$ 147.00
Senior Engineer/Consultant	\$ 142.00
Project Engineer	\$ 136.00
Engineer/Consultant	\$ 131.00
Intern	\$ 75.00
Administrative	\$ 55.00

- Status: The District is eligible to request the 3% augmentation with no further documentation. In order to request actual ADA costs, the attached worksheet must be completed (optional). Please advise us of your preference.

- Over 50 year-old Buildings Augmentation – Additional funding for site development work related to upgrading utility service is available for the over 50 year old buildings. In order to request this additional funding, a Site Development Worksheet for Additional Grants must be completed by the architect or other design professional (attached). This grant is optional. **Please be aware that the OPSC Plan Verification will review the request for additional grants, and will make adjustments to the request, which the District must further substantiate or concur with.**
 - Status: In order to capture this funding, the attached worksheet must be completed.

- Qualification for SB 575 Funding – The project may qualify for additional funding for an automatic fire detection/alarm system if it meets the provisions of SB 575. Please advise if the plans and specifications for the project contain these elements.
 - Status: We will ask for this funding unless you indicate otherwise.

- High Performance Grant Augmentation – SFP Regulation Section 1859.77.4, *Addition to a Site and Modernization Grant for High Performance Incentive*, provides additional funding for projects that incorporate high performance design features including, but not limited to, use of natural lighting, energy and water efficiency, improved indoor air quality and use of recycled materials. To qualify, a project must meet a minimum point score based on the HPRC, and receive DSA concurrence on the point total. Please consult with the project architect to determine if the project is eligible for this augmentation.
 - Status: It is our understanding that this project does not qualify for High Performance Grants.

- Career Tech Confirmation – Written confirmation from the District’s Career Technical Advisory Committee that the need for vocational and career technical facilities is being adequately met within the District and relative to this project.
 - Status: We have this in house.

- Resolution Date – Please provide a copy of the School District Board approved resolution that approves the filing of the project. A sample resolution can be provided at your request.
 - Status: Please provide the most current Board resolution authorizing Tim as signatory for SFP projects.

- Construction Delivery Method – Please identify one of the following:
 - Design-Bid-Build
 - Design-Build
 - Developer Built
 - Lease Lease-Back
 - Status: Need construction delivery method.

- SAB 50-04, *Application for Funding*, signed by the District representative and architect. **SFC will complete this form for the project upon receipt of finalized construction cost and the information listed above.**

Client#: 2360

KILOWENGI

ACORD CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
04/01/11

PRODUCER
Dealey, Renton & Associates
P. O. Box 12675
Oakland, CA 94604-2675
510 465-3090

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.

INSURED
Kilowatt Engineering, Inc
dba: KW Engineering
287 17th Street, Suite 300
Oakland, CA 94612

INSURERS AFFORDING COVERAGE	NAIC #
INSURER A: Hartford Casualty Insurance Co.	
INSURER B: Travelers Property Casualty Co of Am	
INSURER C: U.S. Specialty Insurance Company	
INSURER D:	
INSURER E:	

COVERAGES

THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. AGGREGATE LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR ADD'L LTR INSRD	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS
A	GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC	57SBAKD1700 General Liab. Excludes Claims Arising out of the Performance of Professional Services	01/07/11	01/07/12	EACH OCCURRENCE \$2,000,000 DAMAGE TO RENTED PREMISES (EA OCCURRENCE) \$300,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$2,000,000 GENERAL AGGREGATE \$4,000,000 PRODUCTS - COMP/OP AGG \$4,000,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	57SBAKD1700	01/07/11	01/07/12	COMBINED SINGLE LIMIT (EA accident) \$2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ GARAGE LIABILITY <input type="checkbox"/> ANY AUTO OTHER THAN EA ACC AGG \$ EXCESS/UMBRELLA LIABILITY <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE DEDUCTIBLE \$ RETENTION \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? If yes, describe under SPECIAL PROVISIONS below	UB5614Y804	02/28/11	02/28/12	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER E L EACH ACCIDENT \$1,000,000 E L DISEASE - EA EMPLOYEE \$1,000,000 E L DISEASE - POLICY LIMIT \$1,000,000
C	OTHER Professional Liability	USS1121623	04/02/11	04/02/12	\$1,000,000 per claim \$1,000,000 annl aggr.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES / EXCLUSIONS ADDED BY ENDORSEMENT / SPECIAL PROVISIONS
For proposal purposes only.

CERTIFICATE HOLDER

SPECIMEN

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL 30 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES.

AUTHORIZED REPRESENTATIVE

[Signature]

AMENDMENT PURCHASE ORDER AGREEMENT

ROUTING FORM


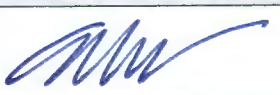

Project Information			
Project Name	Retro Commissioning Project	Site	Facilities
Basic Directions			
Services cannot be provided until the contract is fully approved and a Purchase Order has been issued.			
Attachment Checklist	<input type="checkbox"/> Proof of general liability insurance, including certificates and endorsements, if contract is over \$15,000 <input type="checkbox"/> Workers compensation insurance certification, unless vendor is a sole provider		

Contractor Information							
Contractor Name	KW Engineering	Agency's Contact	Bruce Chamberlain				
OUSD Vendor ID #	V060571	Title	Project Manager				
Street Address	287-17 th Street, #300	City	Oakland	State	CA	Zip	94612
Telephone	510-834-6420	Policy Expires	1-7-2014				
Contractor History	Previously been an OUSD contractor? X Yes <input type="checkbox"/> No			Worked as an OUSD employee? <input type="checkbox"/> Yes x No			
OUSD Project #	07114						

Term			
Date Work Will Begin	12-1-2011	Date Work Will End By (not more than 5 years from start date)	6-30-2013

Compensation			
Total Contract Amount	\$	Total Contract Not To Exceed	\$ 38,976.00
Pay Rate Per Hour (If Hourly)	\$	If Amendment, Changed Amount	\$ 6,256.00
Other Expenses		Requisition Number	

Budget Information				
<i>If you are planning to multi-fund a contract using LEP funds, please contact the State and Federal Office before completing requisition.</i>				
Resource #	Funding Source	Org Key	Object Code	Amount
9399, 9599, 9699	Measure B	9189901891	6215	\$6,256.00

Approval and Routing (In order of approval steps)					
Services cannot be provided before the contract is fully approved and a Purchase Order is issued. Signing this document affirms that to your knowledge services were not provided before a PO was issued.					
	Division Head	Charles Love	Phone	510-535-7081	Fax 510-535-7082
1.	Capital Program Contract & Accounting Manager				
	Signature		Date Approved	2-27-13	
2.	General Counsel, Department of Facilities Planning and Management				
	Signature		Date Approved	3.4.13	
3.	Associate Superintendent, Facilities Planning and Management				
	Signature		Date Approved		
4.	President, Board of Education				
	Signature		Date Approved		