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OAKLAND UNIFIED
SCHOOL DISTRICT
Community Schools, Thriving Students

Memo

To Board of Education

From Antwan Wilson, Superintendent and Secretary, Board of Education
By: Vernon Hal, Senior Business Officer *VEH*
Joe Dominguez, Deputy Chief, Facilities Planning and Management

Board Meeting Date January 11, 2017

Subject Agreement for Facilities Master Plan - Jacobs - Division of Facilities, Planning and Management Project

Action Requested Approval by the Board of Education of Agreement for Facilities Master Plan between District and Jacobs Engineering Group, Inc., Oakland, CA, for the latter to provide Facilities Community Involvement, Enrollment Projections, Facility Capacity and Utilization Study, Facilities Needs Assessment, Maintenance, Schedules and Determination of Eligibility of State Funding, District Strategic Plan, Board Approved Asset Management Plan and Educational Technology Master Plan, Facility Condition Assessments, Educational Adequacy Assessments, Educational Specifications and Standards, Digital Facilities Master Plan, Cost Matrix (Prioritization), ADA Self-Evaluation, Development of Transition Plan, Project Database and Mapping, Draft Master Facilities Plan, Best Practices for New Facility Construction, Increase Sustainability, Energy Resource and Water Conservation, Identify Potential Properties for Site or Facility Reuse, Acquisition, Sale, Lease and Land Swap, Transportation and Parking, Deferred Maintenance Plan, Mandatory Deliverables & Meetings, in conjunction with the Division of Facilities Planning and Management Project, more specifically delineated in the Scope of Services in Exhibit "A", incorporated herein by reference as though fully set forth, for the period commencing January 12, 2017 and concluding no later than January 12, 2018, in an amount not to exceed \$2,331,778.00. This includes the Board's request for 1) Enhanced scope for community engagement and 2) Small local and small local resident business participation.

Discussion The District is in need of a clear path for revitalization of our schools. This comprehensive facilities plan will provide the necessary information in a clear fashion.

LBP (Local Business Participation Percentage) 50.7%

Procurement Method RFP/RFQ Process

Recommendation Approval by the Board of Education of Agreement for Facilities Master Plan between District and Jacobs Engineering Group, Inc., Oakland, CA, for the latter to provide Facilities Community Involvement, Enrollment Projections,

Facility Capacity and Utilization Study, Facilities Needs Assessment, Maintenance, Schedules and Determination of Eligibility of State Funding, District Strategic Plan, Board Approved Asset Management Plan and Educational Technology Master Plan, Facility Condition Assessments, Educational Adequacy Assessments, Educational Specifications and Standards, Digital Facilities Master Plan, Cost Matrix (Prioritization), ADA Self-Evaluation, Development of Transition Plan, Project Database and Mapping, Draft Master Facilities Plan, Best Practices for New Facility Construction, Increase Sustainability, Energy Resource and Water Conservation, Identify Potential Properties for Site or Facility Reuse, Acquisition, Sale, Lease and Land Swap, Transportation and Parking, Deferred Maintenance Plan, Mandatory Deliverables & Meetings, in conjunction with the Division of Facilities Planning and Management Project, more specifically delineated in the Scope of Services in Exhibit "A", incorporated herein by reference as though fully set forth, for the period commencing January 12, 2017 and concluding no later than January 12, 2018, in an amount not to exceed \$2,331,778.00. This includes the Board's request for 1) Enhanced scope for community engagement and 2) Small local and small local resident business participation

Fiscal Impact

Fund 21, Measure J

Attachments

- Agreement including scope of work
- Certificate of Insurance
- Consultant Proposal

CONTRACT JUSTIFICATION FORM
This Form Shall Be Submitted to the Board Office
With Every Consent Agenda Contract.

Legislative File ID No.

16-2378

Department: Facilities Planning and Management

Vendor Name: Jacobs Engineering Group, Inc.

Project Name: Facilities Planning and Management

Project No.: 00918

Contract Term: Intended Start: 1/12/2016

Intended End: 1/12/2017

Annual (if annual contract) or Total (if multi-year agreement) Cost: \$2,331,778.00

Approved by: Tadashi Nakadegawa

Is Vendor a local Oakland Business or have they meet the requirements of the

Local Business Policy?

Yes (No if Unchecked)

How was this Vendor selected?

RFP Process

Summarize the services this Vendor will be providing.

Facilities Community Involvement, Enrollment Projections, Facility Capacity and Utilization Study, Facilities Needs Assessment, Maintenance, Schedules and Determination of Eligibility of State Funding, District Strategic Plan, Board Approved Asset Management Plan and Educational Technology Master Plan, Facility Condition Assessments, Educational Adequacy Assessments, Educational Specifications and Standards, Digital Facilities Master Plan, Cost Matrix (Prioritization), ADA Self-Evaluation, Development of Transition Plan, Project Database and Mapping, Draft Master Facilities Plan, Best Practices for New Facility Construction, Increase Sustainability, Energy Resource and Water Conservation, Identify Potential Properties for Site or Facility Reuse, Acquisition, Sale, Lease and Land Swap, Transportation and Parking, Deferred Maintenance Plan, Mandatory Deliverables & Meetings

Was this contract competitively bid?

Yes (No if Unchecked)

If No, please answer the following:

1) How did you determine the price is competitive?

Facilities took and average of the RFP submitted to determine the price.

2) Please check the competitive bid exception relied upon:

Educational Materials

Special Services contracts for financial, economic, accounting, legal or administrative services

CUPCCAA Exception (Uniform Public Construction Cost Accounting Act)

Professional Service Agreements of less than \$86,000 (increases a small amount on January 1 of each year)

Construction related Professional Services such as Architects, DSA Inspectors, Environmental Consultants and Construction Managers (require a "fair, competitive selection process)

Energy conservation and alternative energy supply (e.g., solar, energy conservation, co-generation and alternative energy supply sources)

Emergency contracts

Technology contracts

electronic data-processing systems, supporting software and/or services (including copiers/printers) over the \$86,000 bid limit, must be competitively advertised, but any one of the three lowest responsible bidders may be selected

contracts for computers, software, telecommunications equipment, microwave equipment, and other related electronic equipment and apparatus, including E-Rate solicitations, may be procured through an RFP process instead of a competitive, lowest price bid process

Western States Contracting Alliance Contracts (WSCA)

California Multiple Award Schedule Contracts (CMAS) [contracts are often used for the purchase of information technology and software]

Piggyback" Contracts with other governmental entities

Perishable Food

Sole Source

Change Order for Material and Supplies if the cost agreed upon in writing does not exceed ten percent of the original contract price

☐ **Other, please provide specific exception**

3) **Not Applicable - no exception - Project was competitively bid**



Date: January 11, 2016

To: Board of Trustees

From: Antwan Wilson, Superintendent
By: Vernon Hal, Senior Business Officer
Joe Dominguez, Deputy Chief Facilities Planning and Management

Re: Approval by the Board of Education of the Agreement for Facilities Master Plan between the District and Jacobs Engineering, Oakland, CA

The purpose of this memo is to provide the background and summary for the FMP work to be completed by the Jacobs team to provide a thorough and comprehensive FMP to guide investment in District Facilities

Background:

The District needs an up to date, thorough, and comprehensive FMP including:

Facilities Community Involvement, Enrollment Projections, Facility Capacity and Utilization Study, Facilities Needs Assessment, Maintenance, Schedules and Determination of Eligibility of State Funding, District Strategic Plan, Board Approved Asset Management Plan and Educational Technology Master Plan, Facility Condition Assessments, Educational Adequacy Assessments, Educational Specifications and Standards, Digital Facilities Master Plan, Cost Matrix (Prioritization), ADA Self-Evaluation, Development of Transition Plan, Project Database and Mapping, Draft Master Facilities Plan, Best Practices for New Facility Construction, Increase Sustainability, Energy Resource and Water Conservation, Identify Potential Properties for Site or Facility Reuse, Acquisition, Sale, Lease and Land Swap, Transportation and Parking, Deferred Maintenance Plan, Mandatory Deliverables & Meetings,

Discussion

Our last FMP was completed in 2010 and is the primary document helping to inform project priorities for the current \$475 million Measure J Bond. This previous FMP identified over \$1.5 billion in need. As the District is focused on additional further improvements to our facilities it is clear that we need a updated guiding document to quantify current need and best prioritization options.

Through a RFP process conducted in Fall of 2016 and including (4) respondents with nationwide experience in guiding urban school districts through capital improvement programs, Jacobs Engineering Group, Oakland, CA was the clear and unanimous high score in both the proposal review stage and interview stage of the process and the overall unanimous recommendation for award.

The work will be carried out at follows:

Major Activities and Timeline/Duration:

December- January 2016

- Board Workshop on Facilities Master Plan
- Development of an internal Facilities Utilization Committee in partnership with internal and external stake holders to review vacant and underutilized sites for internal program use, reuse, sale, lease, swap or charter space.
- Demographic Study completed and data used for strategic planning for upcoming school year

June 2017

- Board approved final draft of Facilities Master Plan
- Vacant sites/underutilized sites designated by the Facilities Master Plan process and filtered through Facilities Utilization Committee and Board Approved
- Community Engagement for 2018 bond

June 2018

- New Bond campaign to support the implementation of the new Facilities Master Plan
- Ongoing Facilities Utilization Committee to review site inventory, vacant and underutilized sites for internal program use, reuse, sale, lease, swap or charter space.

Master Plan Scope of Work:

Scope of Work:

Scope adjustments are outlined below by associated existing contract Schedule of Values categories:

Task 1. Enhanced Community Engagement (14 meetings) – This proposal includes enhanced outreach services to be led by two collaborating Oakland-based small businesses. Scope of services is **consistent with District policy BP 7155** on community engagement and includes:

1. Conduct Plan for Planning and Engagement workshop with OUSD.
2. Development and implementation of a project Communications Strategy.
3. Development of and updating of a project-specific website to be hosted within OUSD's website to include links to online surveys and downloadable community documents.
4. Monitor and report project-related social media.
5. Development of project branding, logo, and graphic standards.
6. Production of re-usable project-specific wayfinding signage to be used at public meetings.
7. Up to 464 hours of community-related advisory consulting and prep/hosting/documenting meetings with school councils, neighborhood and community organizations to be determined in collaboration with OUSD.
8. Assist OUSD in nominating and recruiting a steering committee consistent with policy BP 7155.
9. Conduct up to 4 steering committee meetings integrated with planning process.
10. Conduct 14 community meetings (2 per board member district).
11. Provide modest refreshments and childcare for community meeting attendees. Venues and security are not included and will be provided by OUSD.
12. Conduct door-to-door canvassing consistent with District policy BP 7155.
13. Up to \$25,000 allowance for community engagement-related printing/reprographics.

14. Attend up to 6 OUSD Board Study Sessions to provide project updates.
15. Up to \$50,000 allowance for document translation services.

Task 2. Enrollment Projections, Facility Capacity and Utilization Study – per RFP

Task 3. Coordination with Third Party State Funding Eligibility Consultant – general coordination and consulting to integrate OUSD state funding eligibility (as determined by a third party consultant) into the facility masterplan.

Task 4. Review District Strategic Plan, Asset Management Plan and Technology Master Plan – per RFP

Task 5. Facility Condition Assessments - Permanent Buildings (90 sites, 5.03M SF) – sites as outlined in attachment as provided by OUSD. It is understood that OUSD has decided to defer condition assessment of portables.

Task 6. Educational Adequacy Assessments - Permanent Buildings – sites as outlined in attachment as provided by OUSD. It is understood that OUSD has decided to defer adequacy assessment of portables.

Task 7. Review Educational Specifications and Develop Assessment Standards – per RFP, to exclude updating of ed specs.

Task 8. Digital Facilities Master Plan (by OUSD) – project-specific website included under Task 1 Enhanced Community Engagement.

Task 9. Cost Matrix (Prioritized Implementation Budget) – per RFP

Task 10. ADA Self-Evaluation - Permanent Buildings – sites as outlined in attachment as provided by OUSD, to include portable buildings. Provide mentoring, training and orientation for small local firm/s who will perform ADA field assessments, building specialized experience and local capacity and serve OUSD in the future.

Task 11. Development of ADA Transition Plan –

Task 12. ADA Project Database and Mapping –

Task 13. Draft Master Facilities Plan - per RFP

Task 14. Best Practices for New Facility Construction – per RFP

Task 15. Sustainability, Energy Resource and Water Conservation Consulting Consultant – general coordination and consulting to integrate OUSD's previous conservation measures and sustainability vision into the facility masterplan.

Task 16. Real Estate Consulting Allowance (Properties for Reuse, Acquisition, Sale, Lease and Swap) – general coordination and real estate advisory consulting allowance.

Task 17. GIS Analysis of Special Education Transportation and Parking – general coordination and GIS transportation analysis consulting, specific to student transportation to include special education.

Task 18. Deferred Maintenance Plan – per RFP

Task 19. Mandatory Deliverables & Meetings – per RFP, with reduced meetings as described in Task 1.

Task 20. Community Asset Assessment and Planning – allowance for assessment of District-owned historically-significant buildings and green spaces, general consulting, and integration of findings into the Facility Master Plan.

Fee and Assumptions:

- Pricing below assumes firm fixed price terms to be billed monthly on a percent complete basis.
- Pricing is provided based on our understanding of OUSD's requirements as discussed during good faith negotiations. If necessary, we look forward to continuing to fine tune scope and fee to best serve your needs.
- Event space reservations to be made and any associated costs such as custodial presence and security or other fees to be paid by OUSD.
- All reprographics for draft and final deliverables will be performed by OUSD or reimbursed at cost by OUSD.



OAKLAND UNIFIED
SCHOOL DISTRICT

LOCAL BUSINESS PARTICIPATION WORKSHEET

PRIME: **Jacobs Engineering Group, Inc.**

Project: OUSD Facilities Master Plan Services RFP

Project #:

Estimate:

Bid Opening Date:

Time:

Project Mgr:

Architect:

LBU Credit Based on Policy

50.7%

*This firm meets the 50% LBU requirement
and receives 2 preference pts/2% bid discount
toward its based bid

Based Bid		\$ 2,331,778.45
Verified Local Business Participation Discount	2 pts [*]	\$ 46,635.57
Based Bid W/ LBP Discount		\$ 2,285,142.88

	Total Dollar Amount of Work	LBE %	SLB%	SLBR%	COMMENTS:
PRIME Company: Jacobs Engineering Group, Inc.					
Address: 300 Frank H Ogawa Plaza # 10	\$ 979,235.12	42.00%			1
City/State: Oakland, CA 94612					2
Phone: (510) 457-0027					3
					4
Company: Communities in Collaboration					
Address: 2323 Broadway	\$ 175,000.00			7.51%	1
City/State: Oakland, CA 94612					2
Phone: (510) 761-5171					3
					4
Company: A Squared Ventures					
Address: 333 Hegenberger, Suite 750	\$ 175,000.00			7.51%	1
City/State: Oakland, CA 94621					2
Phone: (415) 274-1821					3
					4



OAKLAND UNIFIED
SCHOOL DISTRICT

	Total Dollar Amount of Work	LBE %	SLB%	SLBR%	COMMENTS:
Company: Shah Kawasaki Architects	\$ 150,000.00		6.43%		1
Address: 570 10th Street, Suite 201					2
City/State: Oakland, California 94607					3
Phone: (510) 663-6090					4
Company: TCG ARCHITECTS, LLC	\$ 100,000.00		4.29%		1
Address: 3400 MacArthur Blvd, No. 119					2
City/State: Oakland, CA 94602					3
Phone: (925) 830-2868					4
TOTAL PARTICIPATION	\$ 1,579,235.12	42.0%	10.7%	15.0%	67.7%


APPROVAL- LEO Compliance Officer

AGREEMENT FOR FACILITIES MASTER PLANNING
Greater Than \$87,700

This Agreement for Facilities Master Planning ("Agreement" or "Contract") is made as of the 25th day of October in the year 2016, between the **Oakland Unified School District** ("District") and **Jacobs Engineering Group, Inc.** ("Consultant"). The District and Consultant may be individually referred to herein as a "Party" or collectively referred to herein as the "Parties."

WHEREAS, absent an exception or exclusion, competitive solicitation is required when contracting for Goods and Services in excess of the State bid limit, adjusted annually for inflation;

WHEREAS, the District is authorized to contract with and employ any persons for the furnishing of special and professional services and advice if those persons are specially trained and experienced and competent to perform the services required;

WHEREAS, the District is in need of such services and advice and the Consultant warrants that it is specially trained, licensed and experienced and competent to perform the services required by the District;

WHEREAS, the Consultant agrees to perform the services described in this Agreement in accordance with the standards of its profession, to District's satisfaction, and in accordance with this Agreement.

NOW, THEREFORE, the Parties agree as follows:

1. **Services.** Consultant shall furnish to the District the following services, as more fully described in **Exhibit "A,"** attached hereto and incorporated herein by this reference ("Services" or "Work"):

The scope of the project is to provide:

- 1) Facilities Community Involvement
- 2) Enrollment Projections
- 3) Facility Capacity and Utilization Study
- 4) Facilities Needs Assessment, Maintenance, Schedules and Determination of Eligibility of State Funding
- 5) District Strategic Plan Board Approved Asset Management Plan and Educational Technology Master Plan
- 6) Facility Condition Assessments
- 7) Educational Adequacy Assessments
- 8) Educational Specifications and Standards
- 9) Digital Facilities Master Plan,
- 10) Cost Metrix (Prioritization)
- 11) ADA Self-Evaluation
- 12) Development of Transition Plan
- 13) Project Database and Mapping
- 14) Draft Master Facilities Plan
- 15) Best Practices for New Facility Construction
- 16) Increase Sustainability Energy Resource and Water Conservation
- 17) Identify Potential Properties for Site or Facility Reuse, Acquisition, Sale, Lease and Land Swap
- 18) Transportation and Parking
- 19) Deferred Maintenance Plan
- 20) Mandatory Deliverables & Meetings

2. **Term.** Consultant shall commence providing Services under this Agreement on January 12, 2017, and will diligently perform as required or requested by District as applicable. The term for these Services shall expire on January 12, 2018. This Agreement may be extended upon mutual approval of both Parties in writing on an annual basis to the extent permissible under applicable law.

3. **Submittal of Documents.** The Consultant shall not commence the Work under this Agreement until the Consultant has submitted and the District has approved the certificate(s) and affidavit(s), and the endorsement(s) of insurance required as indicated below:

<u> X </u>	Signed Agreement	<u> X </u>	W-9 Form
<u> X </u>	Insurance Certificates & Endorsements	<u> X </u>	Workers' Compensation Certificate
<u> N/A </u>	Bonds (as requested by District)	<u> X </u>	Debarment Certification
<u> X </u>	Fingerprinting/Criminal Background Investigation Certification		Other: _____

4. **Compensation.** District agrees to pay the Consultant for Services satisfactorily rendered pursuant to this Agreement, at the rates indicated and as more specifically described in **Exhibit "B,"** on an hourly basis and a per-item basis, as applicable, and up to a **maximum amount not-to-exceed Two million, three hundred thirty-one thousand, seven hundred seventy-eight dollars and no cents** ("Contract Price"). District shall pay Consultant only for all undisputed amounts in installment payments within thirty (30) day after term after the Consultant submits an invoice to the District for Work actually completed and after the District's written approval of the Work, or the portion of the Work for which payment is to be made.

5. **Expenses.** District shall not be liable to Consultant for any costs or expenses paid or incurred by Consultant in performing the Work. Expenses will not be charged on this Work above the maximum not-to-exceed amount of the Contract Price. Rates for expenses are included on the Schedule of Fees and Charges attached hereto as **Exhibit "B"**.

6. **Materials.** Consultant shall furnish, at his/her own expense, all labor, materials, equipment, supplies and other items necessary to complete the services to be provided pursuant to this Agreement.

7. **Local, Small Local and Small Local Resident Business Enterprise (L/SL/SLRBE) Program:** Consultant shall comply with the requirements of District's L/SL/SLRBE Program, as applicable, which may require a fifty percent (50%) mandatory minimum local participation requirement in the performance of this Agreement. A copy of the District's Local Business Participation Policy can be obtained on the District's website, at www.ousd.k12.ca.us, under District Services, Facilities Planning & Management Department, Bids and Requests for Proposals.

8. **Independent Contractor.** Consultant, in the performance of this Agreement, shall be and act as an independent contractor. Consultant understands and agrees that he/she and all of his/her employees shall not be considered officers, employees, agents, fiduciaries, partner, or joint venture of the District, and are not entitled to benefits of any kind or nature normally provided employees of the District and/or to which District's employees are normally entitled, including, but not limited to, State Unemployment Compensation or Worker's Compensation. Consultant shall assume full responsibility for payment of all federal, state and local taxes or contributions, including unemployment insurance, social security and income taxes with respect to Consultant's employees.

9. **Standard of Care.**

9.1. Consultant represents that Consultant has the qualifications and ability to perform the Services in a professional manner, without the advice, control or supervision of District. Consultant's Services will be performed, findings obtained, reports and recommendations

prepared in accordance with generally and currently accepted principles and practices of its profession for services to California school districts. Consultant's Services will be performed with due care and in accordance with applicable law, code, rule, regulation, and/or ordinance.

- 9.2. Consultant hereby represents that it possesses the necessary professional capabilities, qualifications, licenses, skilled personnel, experience, expertise, and financial resources, and it has available and will provide the necessary equipment, materials, tools, and facilities to perform the Services in an efficient, professional, and timely manner in accordance with the terms and conditions of the Agreement.
- 9.3. Consultant shall be responsible for the professional quality, technical accuracy, completeness, and coordination of the Services, and Consultant understands that the District relies upon such professional quality, accuracy, completeness, and coordination by Consultant in performing the Services.
- 9.4. Consultant shall ensure that any individual performing work under the Agreement requiring a California license shall possess the appropriate license required by the State of California. All personnel shall have sufficient skill and experience to perform the work assigned to them.

10. **Originality of Services.** Consultant agrees that all technologies, formulae, procedures, processes, methods, writings, ideas, dialogue, compositions, recordings, teleplays and video productions prepared for, written for, or submitted to the District and/or used in connection with this Agreement, shall be wholly original to Consultant and shall not be copied in whole or in part from any other source, except that submitted to Consultant by District as a basis for such services.

11. **Copyright/Trademark/Patent.** Consultant understands and agrees that all matters produced under this Agreement shall become the property of District and cannot be used without District's express written permission. District shall have all right, title and interest in said matters, including the right to secure and maintain the copyright, trademark and/or patent of said matter in the name of the District. Consultant consents to use of Consultant's name in conjunction with the sale, use, performance and distribution of the matters, for any purpose and in any medium.

12. **Termination.**

- 12.1. **Without Cause by District.** After giving Consultant 30 days written notice. District may, upon thirty (30) day notice, with or without reason, terminate this Agreement and compensate Consultant only for services satisfactorily rendered to the date of termination. Written notice by District shall be sufficient to stop further performance of services by Consultant. Notice shall be deemed given when received by the Consultant or no later than three days after the day of mailing, whichever is sooner.
- 12.2. **Without Cause by Consultant.** Consultant may, upon sixty (60) days notice, with or without reason, terminate this Agreement. Upon this termination, District shall only be obligated to compensate Consultant for services satisfactorily rendered to the date of termination. Written notice by Consultant shall be sufficient to stop further performance of services to District. Consultant acknowledges that this sixty (60) day notice period is acceptable so that the District can attempt to procure the Services from another source.
- 12.3. **With Cause by District.** District may terminate this Agreement upon giving of written notice of intention to terminate for cause. Cause shall include:
 - 12.3.1. material violation of this Agreement by the Consultant; or
 - 12.3.2. any act by Consultant exposing the District to liability to others for personal injury or property damage; or
 - 12.3.3. Consultant is adjudged a bankrupt, Consultant makes a general assignment for the benefit of creditors or a receiver is appointed on account of Consultant's insolvency.

Written notice by District shall contain the reasons for such intention to terminate and, unless within three (3) calendar days after that notice the condition or violation shall cease

or satisfactory arrangements for the correction thereof be made, this Agreement shall upon the expiration of the three (3) calendar days cease and terminate. In the event of this termination, the District may secure the required Services from another Consultant. If the expense, fees, and/or costs to the District exceeds the cost of providing the Services pursuant to this Agreement, the Consultant shall immediately pay the excess expense, fees, and/or costs to the District upon the receipt of the District's notice of these expense, fees, and/or costs. The foregoing provisions are in addition to and not a limitation of any other rights or remedies available to District.

- 12.4. Upon termination, Consultant shall provide the District with all documents produced maintained or collected by Consultant pursuant to this Agreement, whether or not such documents are final or draft documents.

13. **Indemnification.** To the furthest extent permitted by California law, Consultant shall defend, indemnify, and hold free and harmless the District, its representatives, officers, consultants, employees, trustees ("the indemnified parties") from claims, demands, causes of action, costs, expenses, liability, loss, damage or injury if relating to personal injury if any, in law or equity ("Claim"), the negligence, recklessness, or willful misconduct of Consultant, its officials, officers, employees, subcontractors, consultants, or agents directly resulting from the negligent performance of the Services or from any activity, work, or thing done, permitted, or suffered by the Consultant in conjunction with this Agreement. The District shall have the right to accept or reject any legal representation that Consultant proposes to defend the indemnified parties.

14. **Insurance.**

- 14.1. The Consultant shall procure and maintain at all times it performs any portion of the Services the following insurance with minimum limits equal to the amount indicated below.

14.1.1. **Commercial General Liability and Automobile Liability Insurance.**

Commercial General Liability Insurance and Any Auto Automobile Liability Insurance that insure against all claims of bodily injury, property damage, personal injury, death, advertising injury, and medical payments arising from Consultant's performance of any portion of the Services. (Form CG 0001 and CA 0001)

- 14.1.2. **Workers' Compensation and Employers' Liability Insurance.** Workers' Compensation Insurance and Employers' Liability Insurance for all of its employees performing any portion of the Services. In accordance with provisions of section 3700 of the California Labor Code, the Consultant shall be required to secure workers' compensation coverage for its employees. If any class of employee or employees engaged in performing any portion of the Services under this Agreement are not protected under the Workers' Compensation Statute, adequate insurance coverage for the protection of any employee(s) not otherwise protected must be obtained before any of those employee(s) commence performing any portion of the Services.

- 14.1.3. **Professional Liability (Errors and Omissions).** Professional Liability (Errors and Omissions) Insurance as appropriate to the Consultant's profession.

Type of Coverage	Minimum Requirement
Commercial General Liability Insurance , including Bodily Injury, Personal Injury, Property Damage, Advertising Injury, and Medical Payments Each Occurrence General Aggregate	\$ 1,000,000 \$ 1,000,000
Automobile Liability Insurance - Any Auto Each Occurrence General Aggregate	\$ 1,000,000 \$ 1,000,000
Professional Liability	\$ 1,000,000

Workers Compensation	Statutory Limits
Employer's Liability	\$ 1,000,000

- 14.2. **Proof of Carriage of Insurance.** The Consultant shall not commence performing any portion of the Services until all required insurance has been obtained and certificates indicating the required coverage's have been delivered in duplicate to the District and approved by the District. Certificates and insurance policies shall include the following:
- 14.2.1. A clause stating: "This policy shall not be canceled or reduced in required limits of liability or amounts of insurance until notice has been mailed to the District, stating date of cancellation or reduction. Date of cancellation or reduction shall not be less than thirty (30) days after date of mailing notice."
 - 14.2.2. Language stating in particular those insured, extent of insurance, location and operation to which insurance applies, expiration date, to whom cancellation and reduction notice will be sent, and length of notice period.
 - 14.2.3. An endorsement stating that the District and the State and their representatives, employees, trustees, officers, are named additional insureds under all policies except Workers' Compensation Insurance, Professional Liability, and Employers' Liability Insurance. An endorsement shall also state that Consultant's insurance policies shall be primary to any insurance or self-insurance maintained by District.
 - 14.2.4. All policies shall be written on an occurrence form, except for Professional Liability which shall be on a claims-made form.
- 14.3. **Acceptability of Insurers.** Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A: VII, unless otherwise acceptable to the District.
15. **Assignment.** The obligations of the Consultant pursuant to this Agreement shall not be assigned by the Consultant.
16. **Compliance with Laws.** Consultant shall observe and comply with all rules and regulations of the governing board of the District and all federal, state, and local laws, ordinances and regulations. Consultant shall give all notices required by any law, ordinance, rule and regulation bearing on conduct of the Work as indicated or specified. If Consultant observes that any of the Work required by this Contract is at variance with any such laws, ordinance, rules or regulations, Consultant shall notify the District, in writing, and, at the sole option of the District, any necessary changes to the scope of the Work shall be made and this Contract shall be appropriately amended in writing, or this Contract shall be terminated effective upon Consultant's receipt of a written termination notice from the District. If Consultant performs any work that is in violation of any laws, ordinances, rules or regulations, without first notifying the District of the violation, Consultant shall bear all costs arising therefrom.
17. **Labor Code Requirements.** Consultant and its subcontractors shall comply with all applicable provisions of the California Labor Code sections 1720-1861, without limitation, the payment of the general prevailing per diem wage rates for public work projects (including repairs and maintenance, where applicable) of more than one thousand dollars (\$1,000). Copies of the prevailing rate of per diem wages are on file with the District/COE. In addition, the Consultant and each subcontractor shall comply with Sections 1735, 1777.5 and 1777.6, forbidding discrimination, and Sections 1776, 1777.5 and 1777.6 concerning the employment of apprentices by Consultant or subcontractors. Willful failure to comply may result in penalties, including loss of the right to bid on or receive public works contracts. **Registration:** As applicable, Consultant and its subcontractors shall comply with the registration and qualification requirements pursuant to sections 1725.5 and 1771.1 of the California Labor Code. **Certified Payroll Records:** Consultant and its subcontractor(s) shall keep accurate certified payroll records of employees, as applicable, and shall make them available to the District/COE immediately upon request.
18. **Permits/Licenses.** Consultant and all Consultant's employees or agents shall secure and

maintain in force such permits and licenses as are required by law in connection with the furnishing of services pursuant to this agreement.

19. **Safety and Security.** Consultant is responsible for maintaining safety in the performance of its rules under this Agreement. Consultant shall be responsible to ascertain from the District the rules and regulations pertaining to the safety, security, and driving on school grounds, particularly when children are present.
20. **Employment with Public Agency.** Consultant, if an employee of another public agency, agrees that Consultant will not receive salary or remuneration, other than vacation pay, as an employee of another public agency for the actual time in which services are actually being performed pursuant to this Agreement.
21. **Anti-Discrimination.** It is the policy of the District that in connection with all work performed under Contracts there be no discrimination against any employee engaged in the work because 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 military and veteran status and therefore the Consultant agrees to comply with applicable Federal and California laws including, but not limited to the California Fair Employment and Housing Act beginning with Government Code Section 12900 and Labor Code Section 1735. In addition, the Consultant agrees to require like compliance by all its subcontractor(s).
22. **Fingerprinting of Employees.** The Consultant shall comply with the provisions of Education Code section 45125.1 regarding the submission of employee fingerprints to the California Department of Justice and the completion of criminal background investigations of its employees. The Consultant shall not permit any employee to have any contact with District pupils until such time as the Consultant has verified in writing to the governing board of the District that the employee has not been convicted of a felony, as defined in Education Code section 45122.1. The Consultant's responsibility shall extend to all employees, subcontractors, agents, and employees or agents of subcontractors regardless of whether those individuals are paid or unpaid, concurrently employed by the District, or acting as independent contractors of the Consultant. Verification of compliance with this section shall be provided in writing to the District prior to each individual's commencement of employment or performing any portion of the Services and prior to permitting contact with any student.
23. **Audit.** Consultant shall establish and maintain books, records, and systems of account, in accordance with generally accepted accounting principles, reflecting all business operations of Consultant transacted under this Agreement. Consultant shall retain these books, records, and systems of account during the Term of this Agreement and for three (3) years thereafter. Consultant shall permit the District, its agent, other representatives, or an independent auditor to audit, examine, and make excerpts, copies, and transcripts from all books and records, and to make audit(s) of all billing statements, invoices, records, and other data related to the Services covered by this Agreement. Audit(s) may be performed at any time, provided that the District shall give reasonable prior notice to Consultant and shall conduct audit(s) during Consultant's normal business hours, unless Consultant otherwise consents.
24. **District's Evaluation of Consultant and Consultant's Employees and/or Subcontractors.** The District may evaluate the Consultant in any manner which is permissible under the law. The District's evaluation may include, without limitation:
 - 24.1. Requesting that District employee(s) evaluate the Consultant and the Consultant's employees and subcontractors and each of their performance.
 - 24.2. Announced and unannounced observance of Consultant, Consultant's employee(s), and/or subcontractor(s).

25. **Limitation of District Liability.** Other than as provided in this Agreement, financial obligations under this Agreement shall be limited to the payment of the compensation provided in this Agreement. Notwithstanding any other provision of this Agreement, in no event, shall either party be liable, regardless of whether any claim is based on contract or tort, for any special, consequential, indirect or incidental damages, including, but not limited to, lost profits or revenue, arising out of or in connection with this Agreement for the services performed in connection with this Agreement.

26. **Disputes:** In the event of a dispute between the parties as to performance of Work, Agreement interpretation, or payment, the Parties shall attempt to resolve the dispute by negotiation and/or mediation, if agreed to by the Parties. Pending resolution of the dispute, Consultant shall neither rescind the Agreement nor stop Work except, Consultant may without liability of any kind, suspend its services under this Agreement if the payment becomes for than 60 days past due.

27. **Confidentiality.** The Consultant and all Consultant's agents, personnel, employee(s), and/or subcontractor(s) shall maintain the confidentiality of all information received in the course of performing the Services. This requirement to maintain confidentiality shall extend beyond the termination of this Agreement.

28. **Notice.** Any notice required or permitted to be given under this Agreement shall be deemed to have been given, served, and received if given in writing and either personally delivered or deposited in the United States mail, registered or certified mail, postage prepaid, return receipt required, or sent by overnight delivery service, or facsimile transmission, addressed as follows:

Oakland Unified School District
955 High Street
Oakland, CA 94601
Tel: 510-535-7038; Fax: 510-535-7082
ATTN: Joe Dominguez, Deputy Chief

Consultant
Jacobs Engineering Group, Inc.
300 Frank H. Ogawa Plaza
Oakland, CA 94612
Tel: 510-457-0027
ATTN: Casey Morris, Principle

Any notice personally given or sent by facsimile transmission shall be effective upon receipt. Any notice sent by overnight delivery service shall be effective the business day next following delivery thereof to the overnight delivery service. Any notice given by mail shall be effective three (3) days after deposit in the United States mail.

29. **Integration/Entire Agreement of Parties.** This Agreement constitutes the entire agreement between the Parties and supersedes all prior discussions, negotiations, and agreements, whether oral or written. This Agreement may be amended or modified only by a written instrument executed by both Parties.

30. **California Law.** This Agreement shall be governed by and the rights, duties and obligations of the Parties shall be determined and enforced in accordance with the laws of the State of California. The Parties further agree that any action or proceeding brought to enforce the terms and conditions of this Agreement shall be maintained in the California county in which the District's administration offices are located.

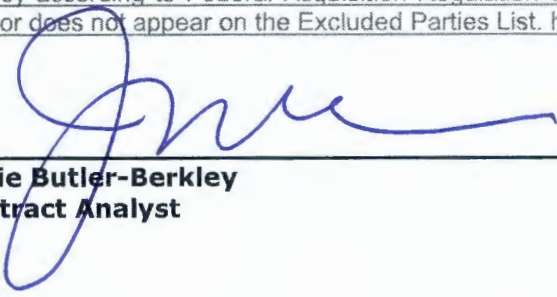
31. **Waiver.** The waiver by either party of any breach of any term, covenant, or condition herein contained shall not be deemed to be a waiver of such term, covenant, condition, or any subsequent breach of the same or any other term, covenant, or condition herein contained.

32. **Severability.** If any term, condition or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remaining provisions will nevertheless continue in full force and effect, and shall not be affected, impaired or invalidated in any way.

33. Incorporation of Recitals and Exhibits. The Recitals and each exhibit attached hereto are hereby incorporated herein by reference.

Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion: The District certifies to the best of its knowledge and belief, that it and its officials: Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency according to Federal Acquisition Regulation Subpart 9.4, and by signing this contract, certifies that this vendor does not appear on the Excluded Parties List.

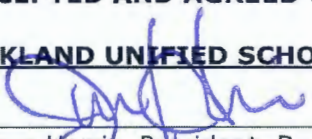
Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion: The District certifies to the best of its knowledge and belief, that it and its officials: Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency according to Federal Acquisition Regulation Subpart 9.4, and by signing this contract, certifies that this vendor does not appear on the Excluded Parties List. <https://www.sam.gov/portal/public/SAM>



Susie Butler-Berkley
Contract Analyst

ACCEPTED AND AGREED on the date indicated below:

OAKLAND UNIFIED SCHOOL DISTRICT


James Harris, President, Board of Education

1-11-17
Date


Antwan Wilson, Superintendent & Secretary, Board of Education

1-11-17
Date


Joe Dominguez, Deputy Chief, Facilities Planning and Management

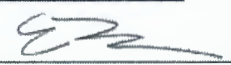
Date

APPROVED AS TO FORM:


OUSD Facilities Legal Counsel

12-16-16
Date

CONSULTANT


Eric Dillinger, Vice President
Jacobs Engineering Group, Inc.

December 16, 2016

Date

Information regarding Consultant:

Consultant: Jacobs Engineering Group, Inc.
License No.: C1578063
Address: 300 Frank H Ogawa Plaza, Suite 600
Oakland, CA 94612
Telephone: 510-457-0027
Facsimile: 510-457-0037
E-Mail: paul.mills@jacobs.com

Type of Business Entity:

☐ Individual
☐ Sole Proprietorship
☐ Partnership
☐ Limited Partnership
☒ Corporation, State: Delaware
☐ Limited Liability Company
☐ Other: _____

95-4081636Employer Identification and/or
Social Security Number

NOTE: United States Code, title 26, sections 6041 and 6109 require non-corporate recipients of \$600 or more to furnish their taxpayer identification number to the payer. The United States Code also provides that a penalty may be imposed for failure to furnish the taxpayer identification number. In order to comply with these rules, the District requires your federal tax identification number or Social Security number, whichever is applicable.


WORKERS' COMPENSATION CERTIFICATION

Labor Code section 3700 in relevant part provides:

Every employer except the State shall secure the payment of compensation in one or more of the following ways:

- a. By being insured against liability to pay compensation by one or more insurers duly authorized to write compensation insurance in this state.
- b. By securing from the Director of Industrial Relations a certificate of consent to self-insure, which may be given upon furnishing proof satisfactory to the Director of Industrial Relations of ability to self-insure and to pay any compensation that may become due to his employees.

I am aware of the provisions of section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the Work of this Contract.

Date:	December 16, 2016
Proper Name of Consultant:	Jacobs Engineering Group, Inc.
Signature:	
Print Name:	Eric Dillinger
Title:	Vice President

(In accordance with Article 5 - commencing at section 1860, chapter 1, part 7, division 2 of the Labor Code, the above certificate must be signed and filed with the awarding body prior to performing any Work under this Contract.)

**CERTIFICATION REGARDING DEBARMENT, SUSPENSION, INELIGIBILITY AND
VOLUNTARY EXCLUSION**

I am aware of and hereby certify that neither Jacobs Engineering Group, Inc. [Type name of Consultant] nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency. I further agree that I will include this clause without modification in all lower tier transactions, solicitations, proposals, contracts and subcontracts.

Where the Consultant or any lower participant is unable to certify to this statement, it shall attach an explanation hereto.

IN WITNESS WHEREOF, this instrument has been duly executed by the Principal of the above named Consultant on the 16 day of December 2016 for the purposes of submission of this Agreement.

By:



Signature

Eric Dillinger

Typed or Printed Name

Vice President

Title

CRIMINAL BACKGROUND INVESTIGATION CERTIFICATION

The undersigned does hereby certify to the governing board of the District as follows:

That I am a representative of the Consultant currently under contract ("Contract") with the District; that I am familiar with the facts herein certified, and am authorized and qualified to execute this certificate on behalf of Consultant. Consultant has taken at least one of the following actions with respect to the construction Project that is the subject of the Contract (check all that apply):

☒ Consultant has complied with the fingerprinting requirements of Education Code section 45125.1 with respect to all Consultant's employees and all of its subcontractors' employees who may have contact with District pupils in the course of providing services pursuant to the Contract, and the California Department of Justice has determined that none of those employees has been convicted of a felony, as that term is defined in Education Code section 45122.1. A complete and accurate list of Consultant's employees and of all of its subcontractors' employees who may come in contact with District pupils during the course and scope of the Contract is attached hereto; and/or

☐ Pursuant to Education Code section 45125.2, Consultant has installed or will install, prior to commencement of Work, a physical barrier at the Work Site, that will limit contact between Consultant's employees and District pupils at all times; and/or

☒ Pursuant to Education Code section 45125.2, Consultant certifies that all employees will be under the continual supervision of, and monitored by, an employee of the Consultant who the California Department of Justice has ascertained has not been convicted of a violent or serious felony. The name and title of the employee who will be supervising Consultant's employees and its subcontractors' employees is

Name: Paul Mills

Title: Engineering Project Manager


☐ The Work on the Contract is at an unoccupied school site and no employee and/or subcontractor or supplier of any tier of Contract shall come in contact with the District pupils.

Megan's Law (Sex Offenders). I have verified and will continue to verify that the employees of Consultant that will be on the Project site and the employees of the Subcontractor(s) that will be on the Project site are **not** listed on California's "Megan's Law" Website (<http://www.meganslaw.ca.gov/>).

Consultant's responsibility for background clearance extends to all of its employees, Subcontractors, and employees of Subcontractors coming into contact with District pupils regardless of whether they are designated as employees or acting as independent contractors of the Consultant.

Date: December 16, 2016

Proper Name of Consultant: Jacobs Engineering Group, Inc.

Signature: 

Print Name: Eric Dillinger

Title: Vice President

EXHIBIT "A"
Scope of Services

Consultant shall perform the following Services:

EXHIBIT B
Facility Masterplan, Fee Proposal

EXHIBIT A

We are pleased to present the following revised fee proposal based on our dialog and follow-on information and document exchange. Jacobs has worked collaboratively with OUSD to evaluate District needs and develop a revised project scope and fee that best achieves District objectives. Jacobs will serve as the prime contractor for this project, with the subcontracted support of local and national firms. The current proposal is consistent with OUSD's small/local business policy, with a combined 67.7% of the contract value pertaining to small local businesses (25.7%) and local business enterprises (42%).

Scope of Work:

Scope adjustments are outlined below by associated existing contract Schedule of Values categories:

Task 1. Enhanced Community Engagement (14 meetings) – This proposal includes enhanced outreach services to be led by two collaborating Oakland-based small businesses. Scope of services is **consistent with District policy BP 7155** on community engagement and includes:

1. Conduct Plan for Planning and Engagement workshop with OUSD.
2. Development and implementation of a project Communications Strategy.
3. Development of and updating of a project-specific website to be hosted within OUSD's website to include links to online surveys and downloadable community documents.
4. Monitor and report project-related social media.
5. Development of project branding, logo, and graphic standards.
6. Production of re-usable project-specific wayfinding signage to be used at public meetings.
7. Up to 464 hours of community-related advisory consulting and prep/hosting/documenting meetings with school councils, neighborhood and community organizations to be determined in collaboration with OUSD.
8. Assist OUSD in nominating and recruiting a steering committee consistent with policy BP 7155.
9. Conduct up to 4 steering committee meetings integrated with planning process.
10. Conduct 14 community meetings (2 per board member district).
11. Provide modest refreshments and childcare for community meeting attendees. Venues and security are not included and will be provided by OUSD.
12. Conduct door-to-door canvassing consistent with District policy BP 7155.
13. Up to \$25,000 allowance for community engagement-related printing/reprographics.
14. Attend up to 6 OUSD Board Study Sessions to provide project updates.
15. Up to \$50,000 allowance for document translation services.

Task 2. Enrollment Projections, Facility Capacity and Utilization Study – per RFP

Task 3. Coordination with Third Party State Funding Eligibility Consultant – general coordination and consulting to integrate OUSD state funding eligibility (as determined by a third party consultant) into the facility masterplan.

Task 4. Review District Strategic Plan, Asset Management Plan and Technology Master Plan – per RFP

Task 5. Facility Condition Assessments - Permanent Buildings (90 sites, 5.03M SF) – sites as outlined in attachment as provided by OUSD. It is understood that OUSD has decided to defer condition assessment of portables.

Task 6. Educational Adequacy Assessments - Permanent Buildings – sites as outlined in attachment as provided by OUSD. It is understood that OUSD has decided to defer adequacy assessment of portables.

Task 7. Review Educational Specifications and Develop Assessment Standards – per RFP, to exclude updating of ed specs.

Task 8. Digital Facilities Master Plan (by OUSD) – project-specific website included under Task 1 Enhanced Community Engagement.

Task 9. Cost Matrix (Prioritized Implementation Budget) – per RFP

Task 10. ADA Self-Evaluation - Permanent Buildings – sites as outlined in attachment as provided by OUSD, to include portable buildings. Provide mentoring, training and orientation for small local firm/s who will perform ADA field assessments, building specialized experience and local capacity and serve OUSD in the future.

Task 11. Development of ADA Transition Plan – per RFP, to exclude preparation of CAD drawings.

Task 12. ADA Project Database and Mapping – per RFP, to exclude preparation of CAD drawings.

Task 13. Draft Master Facilities Plan - per RFP

Task 14. Best Practices for New Facility Construction – per RFP

Task 15. Sustainability, Energy Resource and Water Conservation Consulting Consultant – general coordination and consulting to integrate OUSD's previous conservation measures and sustainability vision into the facility masterplan.

Task 16. Real Estate Consulting Allowance (Properties for Reuse, Acquisition, Sale, Lease and Swap) – general coordination and real estate advisory consulting allowance.

Task 17. GIS Analysis of Special Education Transportation and Parking – general coordination and GIS transportation analysis consulting, specific to student transportation to include special education.

Task 18. Deferred Maintenance Plan – per RFP

Task 19. Mandatory Deliverables & Meetings – per RFP, with reduced meetings as described in Task 1.

Task 20. Community Asset Assessment and Planning – allowance for assessment of District-owned historically-significant buildings and green spaces, general consulting, and integration of findings into the Facility Master Plan.

Fee and Assumptions:

- Pricing below assumes firm fixed price terms to be billed monthly on a percent complete basis.
- Pricing is provided based on our understanding of OUSD's requirements as discussed during good faith negotiations. If necessary, we look forward to continuing to fine tune scope and fee to best serve your needs.
- Event space reservations to be made and any associated costs such as custodial presence and security or other fees to be paid by OUSD.
- All reprographics for draft and final deliverables will be performed by OUSD or reimbursed at cost by OUSD.

Oakland Unified School District Facility Masterplan

Estimated Number of Facilities 90
Estimated Total Square Feet 5,027,656

Activity	Hours	Total Fee
Base Fee Proposal		
Task 1. Enhanced Community Engagement	2,958	\$ 584,718
Task 2. Enrollment Projections, Facility Capacity and Utilization Study ("Demographic Study")	394	\$ 55,586
Task 3. Coordination with Third Party State Funding Eligibility Consultant	120	\$ 19,425
Task 4. Review District Strategic Plan, Asset Management Plan and Technology Master Plan	200	\$ 16,604
Task 5. Facility Condition Assessments - Permanent Buildings (90 sites, 5.03M SF)	2,603	\$ 490,651
Task 6. Educational Adequacy Assessments - Permanent Buildings	1,064	\$ 145,142
Task 7. Review Educational Specifications and Develop Assessment Standards	108	\$ 19,070
Task 8. Project Website (included in Task 1)	-	\$ -
Task 9. Cost Matrix (Prioritized Implementation Budget)	184	\$ 29,335
Task 10. ADA Self-Evaluation - Permanent Buildings	1,045	\$ 191,857
Task 10A. ADA Self-Evaluation - Portables	160	\$ 21,600
Task 11. Development of ADA Transition Plan	1,396	\$ 175,627
Task 12. ADA Project Database and Mapping	429	\$ 76,144
Task 13. Draft Master Facilities Plan	854	\$ 177,379
Task 14. Best Practices for New Facility Construction	140	\$ 19,771
Task 15. Sustainability, Energy Resource and Water Conservation Consulting	158	\$ 22,155
Task 16. Real Estate Consulting Allowance (Properties for Reuse, Acquisition, Sale, Lease and Swap)	112	\$ 21,141
Task 17. GIS Analysis of Special Education Transportation and Parking	180	\$ 24,223
Task 18. Deferred Maintenance Plan	196	\$ 32,483
Task 19. Mandatory Deliverables & Meetings	348	\$ 58,868
Task 20. Community Asset Assessment (Historic Structures, Green Spaces)	933	\$ 150,000
Total Proposed Fee for Base Services	13,582	\$ 2,331,778

Exhibit C

Hourly rates for additional services are outlined below, and are valid up to end of base year of contract. Rates will be subject to 4% increase each anniversary of contract execution.

Direct expenses for additional services will be reimbursed at cost without markup.

Title	Hourly Rate
Principal in Charge	276
Project Manager	256
Project Coordinator	103
Senior Planning Director	265
GIS Analyst	131
Planning Director	158
Financial Analyst	158
Community Engagement Specialist	158
Web Developer	206
Educational Specs SME	251
Asset Management SME	236
Educational Adequacy Assessor	118
ADA Principal	310
ADA Inspector	142
ADA AutoCAD	79
Transportation Engineer	236
Transportation Planner	103
Architect Assessor	147
MEP Assessor	147



160 Spear Street, Suite 1200
San Francisco, CA 94105

October 5, 2016

Oakland Unified School District
Attention: Cesar Monterrosa
Director of Facilities
955 High Street
Oakland, CA 94601

RE: RFQ for Updating Long Range Facilities Master Planning Services And Facilities Condition Assessment, And Preparing Educational Adequacy Assessment And Ada Self-Evaluation And Transition Plan; Prepare Demographic Study

Dear Selection Committee:

We enthusiastically submit our qualifications to provide services for the above reference RFQ to Oakland Unified School District (OUSD). Our team, comprised of **Jacobs and DeJong-Richter**, includes national and local industry leaders in school facilities and a best-value solution to address your district's operational challenges.

Jacobs has delivered more K-12 facility assessments and master plans nationwide than any other firm. Together with DeJong-Richter, our team has worked at dozens of large urban school districts, representing more than one billion square feet nationwide, developing facility master plans that have resulted in public support for more than \$5.2 billion of facilities funding in the last five years alone. No other team can boast that amount of K-12 involvement and success, and market-specific experience makes a world of difference in a successful facility condition assessment and master plan program for schools.

Our team helps you deliver the following benefits to your stakeholders:

- **Student focus** – in addition to a technical measure of physical needs, we provide a functional adequacy assessment tailored to help your buildings support innovative instructional models
- **Districtwide equity** – we assess and plan schools for all OUSD students equitably
- **Actionable findings and defensible decisions** – our plan is based on a consistent, objective measure of capital needs that stand up to the scrutiny of the diverse OUSD community
- **Stakeholder alignment** – we apply our proven transparent assessment, master planning and optional community outreach techniques
- **Best value** – we understand that your budgets are limited and you require maximum value in return for your investment on this project

On behalf of our entire team, we look forward to a successful relationship with OUSD and commit the full resources of our firms to support you in your commitment to provide a high quality education to every student.

Regards,

Casey Morris, Principal
210.403.5559 | casey.morris@jacobs.com

Nina Wollman, K-12 National Director
817.735.2850 | nina.wollman@jacobs.com

Table of Contents (Section 2)

"In our business it is rare to find such exceptional partners and caring individuals.

"They [Jacobs] continue to support the time to suggest solutions. They are truly professionals and know how to do their work effectively and efficiently."

*Debbie Karcher,
Chief Information Officer,
Information Technology
Services, Miami-Dade County
Public Schools*

Section 1.	Letter of Transmittal	page 1
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Section 4.	Proposed Personnel/Project Team	pages 5 – 12
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Section 6.	Firm Information	pages 19 – 23
Section 7.	Prior Relevant Experience	pages 24-31
Section 8.	Cost Proposal	page 32

Prior Relevant Experience (Section 7)

Our experience with projects similar to yours makes our team best suited to support improved stewardship of your facility assets and provide the best value for your investment.

Each of the projects featured in this section utilized our structured MAPPS database software solution to track and address school districts' deferred maintenance backlogs.

We implement innovative assessment strategies that are objective, standards-based and customizable. If needed, we vary the level of detail based on age of a given facility, modelling/representative sampling and a compilation of known critical needs. This provides you with data at a lower cost yet still provides the defensible transparency that allows your stakeholders to rest easy at the end of the day.

OUSD can expect credible, actionable results as demonstrated by this team's proven performance on dozens of relevant K-12 assessment and master planning engagements through which Jacobs and DeJong-Richter have helped public school districts build the case for more than \$5.2 billion in public funding since 2011. Working together, we accomplished this by building consensus around solutions that uphold district priorities based on consistent, accurate facility data under a structured planning methodology.

On the next pages, we have provided the below five projects in more detail. These projects have scopes strikingly similar to yours, and showcase our experience in providing assessments and master planning services for K-12 education clients.

Fulton County Schools

Our facility condition assessments and master planning services provided a foundation for the district to achieve overwhelming success on their sales tax referendum **with a 77% approval by voters**. Additionally, our assessments and master planning team collaborated with our project management services team to continue implementation of a highly successful program that fully meets Fulton County's needs.

Aldine Independent School District

We implemented a comprehensive approach to assessments in this urban district with aging facilities. Our input resulted in a **72% voter approved** public referendum for \$798M in capital funding, and the resulting master plan greatly improved their approach to curriculum delivery.

Klein Independent School District

This district engaged our team to create a customized approach to assessing their facilities. After collaborating with stakeholders to best understand their needs, we tailored our assessments to meet campus-specific needs and goals to provide defensible data to back their \$498 million bond program. The resulting public support has led to an increase in funding, providing better outcomes for their students.

Miami-Dade County Public Schools

We have supported this district for 12 years with assessments and master planning services. When we first engaged with them, they were grappling with their deferred maintenance backlog. Now, our software solution is the backbone of their district information systems. Our services continue to support Miami-Dade's \$1.2 billion capital program.

Fort Bend Independent School District

Fort Bend ISD is a similarly sized district to yours. We implemented a planning approach with both the staff and the community that resulted in a successful \$435 million bond referendum. Our on-going management of condition data with our MAPPS software application continues to support the district to this day.

OAKLAND UNIFIED SCHOOL DISTRICT
Long Range Facilities Master Planning and Related Services

In addition to these five, the table below provides a representative sampling of the school clients nationwide who have entrusted us with their facility assessments, master planning and capital planning needs over the past five years.

Selected K-12 Assessment & Master Planning History
(✓ collaboration with Jacobs and DeJong-Richter, * in progress)

District	Year Complete	# of Schools	GSF	Condition Assessment	Software Implementation	Master Plan	Educational Adequacy	Enrollment Projections	Bond/Financial Planning	Community Engagement
Profiled Projects:										
✓ Fresno County Schools, Atlanta, GA	2009	97	9.8M	■	■	■	■		■	■
✓ Fulton County Schools, Atlanta, GA	2016	99	14M	■	■	■	■		■	■
✓ Aldine Independent School District, Houston, TX	2015	73	9.2M	■	■	■	■		■	■
✓ Klein Independent School District, TX	2015	59	6.2M	■	■	■	■	■	■	■
Miami-Dade County Public Schools, Miami, FL	2013	200	20M	■	■	■			■	
✓ Fort Bend Independent School District, Sugar Land, TX	2014	91	11M	■	■	■	■		■	■
Additional Experience:										
Elk Grove Unified School District, CA	2015	65	5.2M	■	■					
Sweetwater Union HS District, Chula Vista, CA	2014	33	4M	■	■	■	■			■
Massachusetts School Building Authority Statewide Assessment* (addl. assessments in 2006 & 2010)	2017	1,800	173M	■	■		■		■	
Polk County Public Schools	Ongoing	124	16.8M					■		■
✓ Duval County Public Schools	Ongoing	158	14.5M			■		■		■
✓ Rhode Island Dept. of Education Statewide Assessment*	2017	300	20M	■	■		■	■	■	■
Manatee County Public Schools	2016	57	7.9M			■		■		■
✓ Canutillo Independent School District, El Paso, TX	2016	12	1.8M	■	■	■	■	■	■	■
✓ Hawaii Dept. of Education Statewide Assessment*	2016	271	25M	■	■	■	■	■	■	■
Ysleta Independent School District, El Paso, TX	2015	60	4.5M	■	■		■		■	■
✓ El Paso Independent School District, TX	2015	93	10M	■	■	■	■	■	■	■
Chicago Public Schools, IL	2015	385	28.9M	■		■				
Broward County Public Schools, Fort Lauderdale, FL	2014	222	23M	■	■	■	■		■	
Orange County Public Schools, Orlando, FL	2014	145	10.9M	■		■	■			
✓ Omaha Public Schools	2014	88	9.5M	■	■	■			■	
✓ Bellevue Public Schools	2014	25	1.9M	■	■	■	■		■	
✓ Arlington Independent School District, TX	2014	89	7.3M	■	■	■	■		■	■
McAllen Independent School District, TX	2014	32	3.3M	■	■	■	■		■	
✓ Houston Independent School District, TX	2013	250	33M	■	■	■	■	■	■	■
Dallas Independent School District, Dallas, TX	2013	182	15M	■		■			■	■
✓ Auburn Public Schools, AL	2013	20	1.5M	■		■	■			■
San Antonio Independent School District, TX	2012	26	2.5M	■	■	■	■			
✓ Baltimore City Public Schools, MD	2012	160	19M	■	■	■	■	■		■
✓ Huntsville City Schools, AL	2012	26	2.5M	■		■	■			
✓ School District of Philadelphia, PA	2012	286	30M	■		■			■	■
✓ Milwaukee Public Schools, WI	2011	140	18M	■	■	■	■			

Fulton County Schools Facility Condition Assessment & Master Plan

ATLANTA, GEORGIA

Fulton County is an urban district in the southeastern US, similar in size to OUSD. We provided them with a condition and adequacy based prioritization of their schools along with cutting-edge facility technology that provides management infrastructure for optimized future capital programs. With our FCA data and Master Plan as a foundation, the district achieved overwhelming support for their sales tax referendum.

Relevance to OUSD:

- ▶ Jacobs / DeJONG/Richter Project
- ▶ Facility Condition Assessment
- ▶ Functional/Educational Adequacy
- ▶ Capacity Analysis
- ▶ MAPPS Software Implementation
- ▶ Facility Capital Master Planning
- ▶ Enrollment and Demographic Analysis
- ▶ Stakeholder Engagement

Completion

March 2016

Reference Contact

Patrick Burke
Deputy Superintendent of Operations
Fulton County Schools
6201 Powers Ferry Road
NW
Atlanta, GA 30339
470.254.8998
burkep@fultonschools.org

"The team has standardized tools to assist the FCS staff in the assessment of our facilities. Given the ever-changing nature of the construction market in Atlanta, having sound data to evaluate scope against budget among projects in a program is essential."

*Patrick Burke, Deputy
Superintendent of Operations,
Fulton County Schools*



Firm's Responsibility/Services Provided:

Our team executed a comprehensive assessment of 99 school and administrative sites in preparation for a sales tax referendum for Fulton County Schools (FCS) in greater Atlanta, GA.

- The project included reviewing existing educational specifications, educational adequacy and condition assessment, master planning and community engagement.
- To perform the educational adequacy assessment, we worked with District leadership to refine existing educational standards; and our teams visited the schools to gather facility data and perform gap analysis against standards.
- Additional teams of building professionals identified building system needs based on system and component evaluations. We deployed our MAPPS software that we used to inform capital planning and assist the District in managing capital and deferred maintenance needs in the coming years.

Value Added:

In addition to providing facility assessment services to FCS, we are providing program and construction management services in support of the District's \$976 million Capital Improvement Program.

This project worked hand-in-hand with the implementation of another contract where our project implementation specialist, John Dougherty, worked with our team providing these up-front planning services while Jacobs simultaneously fulfilled a program and construction management role.

Fresno Unified School District Facility Master Plan & Condition Assessment

FRESNO, CALIFORNIA

Fresno Unified School District is a large, urban district located in the San Joaquin Valley, similar in size to OUSD. Serving over 73,000 students, the district has rich cultural and ethnic diversity creating unique but rewarding challenges. To assist in the overall vision of the education program, the district acknowledged the strong influence that the physical environment has upon learning and teaching. We provided them with a condition and adequacy based prioritization of their schools for optimized future capital programs.

Relevance to OUSD:

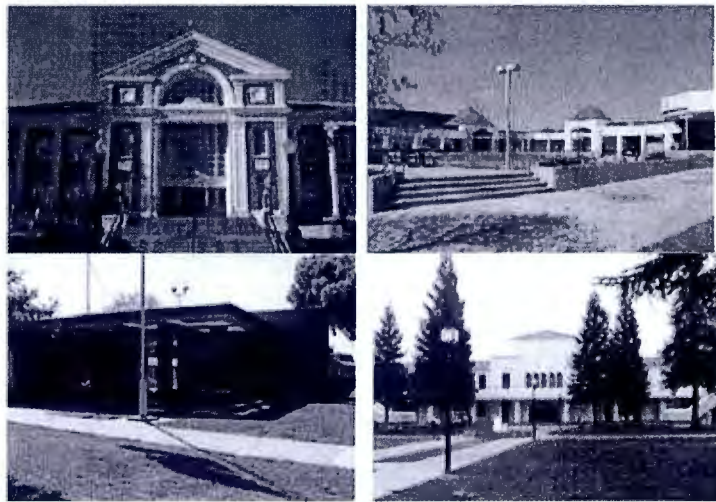
- ▶ Jacobs Project
- ▶ Facility Condition Assessment
- ▶ Functional/Educational Adequacy
- ▶ Facility Capital Master Planning
- ▶ Enrollment and Demographic Analysis
- ▶ Stakeholder Engagement

Completion

April 2009

Reference Contact

Lisa LeBlanc
Executive Director
Facilities Management &
Planning
559.457.6126
lalebla@fresno.k12.ca.us



Firm's Responsibility/Services Provided:

As in most districts over the past decade, Fresno USD experienced many years of exceptional growth, physically answered by the placement of multiple portable structures on most of the school sites, creating overcrowding and site limitations. The district acknowledged the need to develop a comprehensive Facilities Master Plan (FMP) as a means of planning and anticipating potential improvements and their funding requirements. The FMP assisted the district to achieve a common equitable base for the district facilities and to anticipate future needs. The plan addressed current facility conditions and suitability, and identified facility improvements to support student engagement and, most importantly, academic achievement.

Value Added:

This plan, as envisioned by the Board, Facility Ad Hoc Advisory Committee (FAAC) and staff, joins the educational programs of the district, with the physical planning of the district facilities. The district's "roadmap to excellence" was established as the overall direction of the district for educational goals. The FMP provided a visionary, "world class" guideline for improvement of district facilities.

Aldine Independent School District Facility Assessment & Master Plan

HOUSTON, TEXAS

Aldine ISD is an urban district with aging facilities. We provided a comprehensive approach, leveraging a facilities solution into improved districtwide operations and enhanced student educational opportunities. The resulting master plan helped the district transform their own approach to curriculum delivery in order to enhance the experience for their students and staff.

Relevance to OUSD:

- ▶ Jacobs / DeJONG/Richter Project
- ▶ Facility Condition Assessment
- ▶ Functional/Educational Adequacy
- ▶ Capacity Analysis
- ▶ MAPPS Software Implementation
- ▶ Facility Capital Master Planning
- ▶ Enrollment and Demographic Analysis
- ▶ Stakeholder Engagement

Completion

August 2015

Reference Contact

Dr. Archie Blanson
Deputy Superintendent of Operations
2520 W.W. Thorne Dr.
Houston, TX 77073
281.449.1011
ablanson@aldine.k12.tx.us



Firm's Responsibility/Services Provided:

Facing sustained enrollment growth of more than 2,100 students a year and aging, under-equipped school buildings marked by significant deferred maintenance backlog, Aldine enlisted Jacobs and DeJong-Richter to deliver its first comprehensive facility assessment and development of its 2015 Facility Master Plan.

- The plan prescribed \$1.6 billion in capital projects including new construction for capacity growth, critical repairs, technology infrastructure and grade reconfigurations to facilitate the District's operational transformation.
- Our focus on equity and transparency yielded overwhelming public support as proven by a 72% approval margin in the District's \$798 bond election in 2015.
- We implemented rapid deployment of four interdisciplinary assessment teams to meet an aggressive project schedule.
- In the interest of saving AISD more than \$25,000 in fees, Jacobs developed a hybrid scalable approach that dialed-in the depth of assessment to school age and mission priority.

Value Added:

While exploring facility options under Jacobs' structured planning process, District leadership came to the consensus that the solution to facility challenges provided an opportunity to implement previously unthinkable operational reforms that achieve cohesive school feeder patterns and sustained student relationships, reduced student transitions, heightened school accountability and improved educational programming.

Klein Independent School District Facility Condition Assessment & Master Plan KLEIN, TEXAS

We supported Klein ISD with a customized approach to assessing their facilities based on individual campus needs. Through our objective and transparent process, we achieved stakeholder trust and support for public funding.

Relevance to OUSD:

- ▶ Jacobs / DeJONG/Richter Project
- ▶ Facility Condition Assessment
- ▶ Functional/Educational Adequacy
- ▶ Capacity Analysis
- ▶ MAPPS Software Implementation
- ▶ Master Planning
- ▶ Enrollment Analysis
- ▶ Stakeholder Engagement
- ▶ Space Inventory
- ▶ Bond Planning

Completion
May 2015

Reference Contact
Robert N. Robertson,
Associate Superintendent
Facility & School Services
Klein Independent School
District
832.249.4520
rrobertson1@kleinisd.net



Firm's Responsibility/Services Provided:

We led the 2014 assessment for the Klein ISD's Facility Master Plan. Prior to beginning the assessments, our team worked with the district to gather historical information on their facilities. Teams were sent into the field to complete comprehensive educational adequacy and building condition assessments. We also converted and upgraded the district's site and floor plans to CAD drawings, developed educational specifications and updated the district's vision. 10-year enrollment projections were prepared for the district, which has been experiencing an increase in enrollment. Applying this data and working through a community engagement process, we developed an overall master plan to address the needs at their campuses. Throughout the master planning process we worked closely with the district and involved the community to create a sense of ownership in the community for the district and their vision.

Value Added:

We carefully incorporated Klein ISD's internal knowledge of their facilities into the assessment process, providing accurate and reliable data. By utilizing our assessment process, tailored with h district knowledge we provided a transparent process that stood up to public scrutiny. We have provided Klein ISD with customized reports to effectively communicate the districts need in an effort to educate the community while working towards passing a Bond program.

Klein ISD benefited from our overall process. They were looking for defensible quality data, which we provided. Our standards driven, repeatable process brought consistent and reliable data. The community engagement process brought transparency to the entire process and showed our data could withstand public scrutiny. Overall we built a significant amount of confidence in the bond proposal with district staff and the community.

Miami-Dade County Public Schools Assessment & Master Plan

MIAMI, FLORIDA

Miami-Dade is an urban district grappling with a deferred maintenance backlog. For 12 years, we have supported the district by providing technology and data management infrastructure for multiple District-performed assessments and State FISH updates.

Relevance to OUSD:

- ▶ Facility Condition Assessment
- ▶ MAPPS Software Implementation
- ▶ Facility Capital Master Planning
- ▶ District Staff-Supported Assessment

Completion
May 2013

Reference Contact
Rolando Necuze, RA
Director, Advance Planning
13135 SW 26th St.
Miami, FL 33175
305.995.4562
rnecuze@dadeschools.net

"In our business it is rare to find such exceptional partners and caring individuals. They [Jacobs] continue to support the District and the application long after it has been implemented. They are always quick to respond to inquiries, available to help with issues and never hesitate to spend the time to suggest solutions. They are truly professionals and know how to do their work effectively and efficiently."

*Debbie Karcher, Chief
Information Officer,
Information Technology
Services, Miami-Dade
County Public Schools*



Firm's Responsibility/Services Provided:

Jacobs has been providing technology and support services to Miami-Dade County Public Schools (MDCPS) continuously since 2004.

- In 2004, 2007 and 2011, we developed processes to assess 335 schools to support their district's \$3.3 billion capital improvement plan. We provided our assessment methodology, MAPPS facility software, staff training and management that allowed MDCPS employees to self-perform all field assessments and data entry.
- Our innovative methodology leveraged their in-house institutional knowledge and staffing capacity to achieve a low-cost, high-value facility assessment solution.
- We implemented an online QA/QC tool, providing increased data quality and transparency to their leadership.

Value Added:

Our MAPPS facility software is fully integrated with the State of Florida's F.I.S.H. (Florida Inventory of School Houses) system, saving Miami-Dade significant time and expense to fulfill State-mandated facility inventory updates.

Fort Bend Independent School District Facilities Condition Assessment & Master Plan SUGAR LAND, TEXAS

Fort Bend ISD is similar in size to OUSD. Our services equipped this public school district with objective facility data to prove the case for increased capital funding and prioritized maintenance. We continue to provide ongoing management of condition data through our MAPPS software solution.

Relevance to OUSD:

- ▶ Jacobs / DeJONG/Richter Project
- ▶ Facility Condition Assessment
- ▶ Functional / Educational Adequacy
- ▶ Capacity Analysis
- ▶ MAPPS Software Implementation
- ▶ Facility Capital Master Planning
- ▶ Enrollment and Demographic Analysis
- ▶ Attendance Boundary Changes
- ▶ Stakeholder Engagement

Completion
November 2014

Reference Contact
D. Allen Bassham
Executive Director Facilities
and School Services
2323 Texas Parkway
Missouri City, TX 77489
281.634.1871
david.bassham@fortbendisd.com

"With the objective data Jacobs collected, FBISD is better equipped to prioritize our maintenance and capital funding for years to come. The transparency and objectivity of the entire process affords us the opportunity to demonstrate our commitment to our students and our community."

*Max Cleaver, Former Chief
Operating Officer, Fort Bend
Independent School District*



Firm's Responsibility/Services Provided:

Our team completed a comprehensive facilities condition and educational adequacy assessment for Fort Bend ISD in suburban Houston, identifying \$484 million in facility needs over a 5-year planning horizon. We compiled data from assessment findings, capacity analysis, a five-year life-cycle forecast and a review of FBISD enrollment projections to inform a transparent planning process resulting in a successful bond election in 2014.

Value Added:

The credible data and extensive community engagement efforts garnered community support and voter approval of a \$435 million bond.

Unique Issues/Creative Initiatives:

Fort Bend ISD is a growing district with many new facilities. To cut overall costs for the assessment, we proposed performing life-cycle only assessments on buildings constructed in the last five years. This approach eliminated over one million square feet from comprehensive assessments and saved the District money on the project. This alternative approach allowed higher-level key information about the newer facilities to be gathered and input into the MAPPS software application for future planning.

Proposed Personnel/Project Team (Section 4)

Each member of our team is experienced with K-12 assessments and master planning services.

Our understanding of your specific needs versus those of any other client type (municipal, healthcare, military, etc.) means we focus on things like district-wide facility equity and adequacy of the student learning environment. Our teams provide objective data based on standards, not a subjective "gut feeling" report of the condition of a facility or individual classroom.

For example, for the **Department of Defense Education Agency**, our 21st Century Education experts implement a standards-based adequacy approach where standards are developed with input from district curriculum experts to address evolving requirements of innovative instructional models.

6.6.1 Resumes

We have hand-selected our team that has provided relevant services to many of the nation's largest school systems, and we integrate into your team to meet OUSD' project goals.

On the next page is an organizational chart that depicts reporting responsibilities of the proposed team. Resumes for each key member of our leadership team (shown in blue) are provided on the following pages.

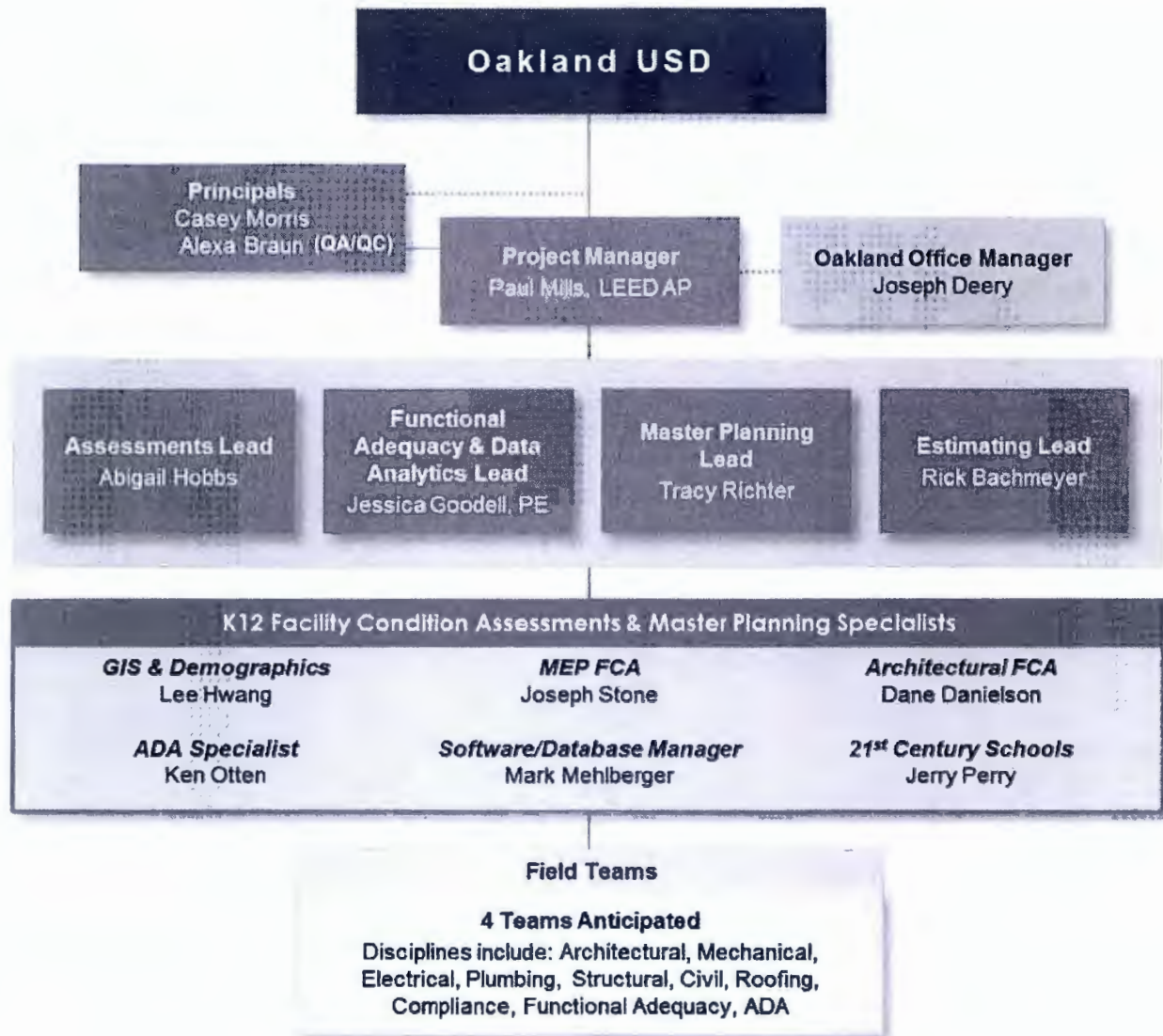
6.6.1.b Contract Responsibility

As project manager, **Paul Mills** is responsible for overall management of the contract and holds ultimate accountability for project success.

6.6.4 Commitment of Personnel

We commit to providing these proposed personnel to your project.

OAKLAND UNIFIED SCHOOL DISTRICT
Long Range Facilities Master Planning and Related Services



CASEY MORRIS

Senior Project Manager



Casey has extensive facility condition and school planning experience. With FCAs and planning as his career focus, Casey has worked in all parts of the country to design and deliver successful facility condition assessments and facility plans. His experience provides OUSD with necessary expertise to achieve District goals and objectives.

Education

BS, Industrial Engineering, Texas A&M University

Professional Memberships

Work History

Overall 22 years of experience.

Jacobs	2010 – Present
Magellan Consulting (acquired by Jacobs in 2010)	2000 – 2010
3D/International	1997 – 2000
United Space Alliance	1993 – 1997

Casey is an industry pioneer in the development of structured facility assessment methodologies for educational clients. He leads Jacobs' K-12 Facility Assessment Practice and has successfully delivered and overseen 47 assessments projects totaling more than 600 million SF. He makes sure that our OUSD team is equipped with all resources required to achieve your goals. Casey works closely with the client, leadership team and project manager to verify expectations are being met and that end goals are the focus of the process.

Representative Project Assignments

- **State of Rhode Island Facility Condition, Educational Program & Energy Assessment (complete April 2017); RI. Senior Project Manager.** Facility condition, educational program and energy assessment for every public school in the State of Rhode Island. Our team utilized our proprietary facility condition assessment program, MAPPS, to assess the schools, document conditions, estimate costs for repairs and calculate the facility condition index, a qualitative and quantitative indicator of the condition of the school. Our team assessed technology and infrastructure elements such as: network systems, physical security systems, emergency plans (campus level and at district level), audio visual systems, internet systems, classroom systems, construction technology, traffic flow, hazardous materials, acoustics and efficacy of emergency plans.
- **Fulton County Schools, Facility Condition Assessment and Master Plan; Atlanta, GA. Project Manager.** Managed an assessment and Master Plan for this large urban/suburban district. The project involved facility condition and educational adequacy assessments on 14 million square feet of space totaling 97 schools. The assessment served as the foundation for a Master Planning effort where options were developed to support a plan to secure public funding through a local option sales tax.
- **Fort Bend Independent School District, Facility Condition Assessment; Sugar Land, TX. Project Manager.** Provided assessment and master planning services. Compiled a comprehensive space inventory, a complete educational adequacy assessment and a complete facility condition assessment for all district facilities to identify current deficiency needs and project life-cycle renewal.
- **Arlington Independent School District, Facility Condition Assessment; Arlington, TX. Project Manager.** Provided assessment and master planning services. Compiled a comprehensive space inventory, a complete educational adequacy assessment and a complete facility condition assessment for all district facilities to identify current deficiency needs and project life-cycle renewal.

PAUL MILLS, LEED AP
Project Manager



Paul has dedicated his career to planning and delivering capital programs for educational clients. Working for public K-12 institutions, he has safeguarded owners' interests in facility master plans and design and construction contracts totaling more than \$3 billion.

Education

MS, Civil Engineering, University of Texas at Austin (coursework)

BA, Economic Development & Spanish, Tulane University

Registrations/Certifications
LEED Accredited Professional

Professional Memberships
Council of Educational Facility Planners International (CEFPI)

Construction Management Association of America (CMAA)

Ntl. Trust for Historic Preservation

Work History

Overall 20 years of experience.

Jacobs	2011 – Present
3DI/Parsons	1995 – 2011

Paul has dedicated his more than 20-year career to the planning, design and construction of high-performance public schools. His leadership and expertise in school facilities that support 21st Century instruction and education reform initiatives such as Small Learning Communities and New Tech High enhances your functional adequacy standards and assessment.

He facilitates a data-driven, consensus-based needs prioritization plan based on customized OUSD functional standards and values, equity and optimum student outcomes. Moreover, Paul's expertise in the implementation of K-12 new construction and renovations provides a practical owner's perspective that makes certain that your facility plan is built upon actionable, fully-budgeted projects.

A passionate advocate for public education, Paul is active in his local school district and has held numerous leadership roles in the Association for Learning Environments (formerly Council of Educational Facility Planners International).

Representative Project Assignments

- Los Angeles Unified School District - Small Learning Communities Conversion and High School Modernization Program.** Program Manager and Master Planner for \$188 million multi-site facilities improvements program supporting secondary education reform initiative to convert large comprehensive high schools into campuses of small personalized academies. Led multi-disciplinary team that reprogrammed 12 urban high schools into contiguous spaces dedicated to semi-autonomous thematic academies, operating under innovative 21st Century pedagogies such as New Tech High and the International Baccalaureate program.
- Hawaii Department of Education, State-Wide Long-Range Facility Master Plan;** Honolulu, HI. *Program Manager.* Leading ongoing multi-disciplinary facility assessment and master plan in support of statewide school district's \$200 million annual capital program. Employing innovative technologies and statewide standards to deliver Hawaii's first facility study that guides informed, data-driven, standards-based decisions with consideration of school capacity utilization, district and island equity, facility inventory and gap analysis.
- Aldine Independent School District, Building and Instruction Technology Assessment and Long Range Facilities Plan;** Houston, TX. *Project Manager.* Completed facility assessment and capacity study for 61-site public school district and delivering ongoing capital master plan with overt stakeholder engagement.
- New Orleans School Facility Master Plan;** New Orleans, LA. *Project Manager.* Led 50+ person multi-disciplinary master plan initiative comprised of facility assessment, space inventory, capital planning and stakeholder outreach, which prescribed a \$1.8 billion capital plan that was instrumental in the recovery of Post-Katrina New Orleans.

JESSICA GOODELL, PE
Educational Adequacy



Jessica is the Project Manager, a single point of contact for all aspects of your facilities condition assessment. Jessica has served in this same role on several large-scale assessment and master planning projects.

Education

MS, Mechanical Engineering,
Lehigh University

BS, Civil Engineering, Merrimack
College

Registrations/Certifications

Professional Engineer: TX

Professional Memberships

Council of Educational Facility
Planners International (CEFPI)

Work History

Overall 14 years of experience.

Jacobs	2010 – Present
Nelson Arch. Engineers	2006 – 2009

Jessica is a professional engineer experienced in facility condition assessment and forensic investigation and assessment. She has served as the Project Manager as well as Field Assessment Manager on numerous K-12 facility condition assessment and functional adequacy engagements. Jessica has experience coordinating multi-disciplined teams in gathering and presenting data. Based on an understanding of the clients' needs, Jessica makes sure that the assessments, data and findings are performed within the agreed scope of work.

Representative Project Assignments

- **State of Rhode Island Facility Condition, Educational Program & Energy Assessment (complete April 2017).** *Project Manager.* Facility condition, educational program and energy assessment for every public school in the State of Rhode Island. Our team utilized our proprietary facility condition assessment program, MAPPS, to assess the schools, document conditions, estimate costs for repairs and calculate the facility condition index. Our team assessed technology and infrastructure elements such as: internet systems, classroom systems, construction technology, traffic flow, hazardous materials, acoustics and efficacy of emergency plans.
- **Klein Independent School District, Facility Condition Assessment;** Klein, TX. *Project Manager.* Provided assessment and master planning services. Conducted a comprehensive educational adequacy assessment and facility condition assessment for all district facilities to identify current deficiency needs and project life-cycle renewal.
- **Fort Bend Independent School District, Facility Condition Assessment;** Sugar Land, TX. *Assessment Manager.* Provided assessment and master planning services. Compiled a comprehensive space inventory, a complete educational adequacy assessment and a complete facility condition assessment for all district facilities to identify current deficiency needs and project life-cycle renewal.
- **Arlington Independent School District, Facility Condition Assessment;** Arlington, TX. *Assessment Manager.* Provided assessment and master planning services. Compiled a comprehensive space inventory, a complete educational adequacy assessment and a complete facility condition assessment for all district facilities to identify current deficiency needs and project life-cycle renewal.
- **Huntsville City Schools, Facility Condition Assessment and Master Plan;** Huntsville, AL. *Assessment Manager.* Led field efforts for building condition assessment of 40 schools. Managed data input and quality review effort under aggressive schedule. Developed and produced various condition reports for direct client use and incorporation into facility master planning process.

Abigail Hobbs, NCARB
Assessment Manager



Abigail is a detail-oriented architectural professional with a commitment to overall quality of our deliverables. As Assessment Manager, she produces workable schedules and confirms the data collected by our assessors is accurate and usable. She is responsible for the overall progress of the field work.

Education

MArch & BS, Architecture,
University of Idaho

Registrations/Certifications

NCARB, National Council of
Architectural Registration Boards

Work History

Overall 14 years of experience.

Jacobs	2005 – 2009; 2013 – Present
San Antonio Military Medical Center	2011 – 2013
WestEast Design Group	2010
RIM Architects	2005
Klauder & Co. Architects	2002 – 2005

Abigail has focused on managing educational suitability and building condition assessment field teams on various K-12 projects throughout the country. She has also aided project managers in the coordination of various phases such as mobilization, field assessments, data entry, data analysis, quality control and reporting in MAPPS.

Abigail has helped conduct field training for both new employees and sub-consultant assessors to verify consistent data is gathered upfront, reducing potential questions and errors during the data entry and reporting phases of the project. Abigail has also performed quality assurance reviews of data and has coordinated with multi-discipline team members to confirm the data that is reported is as accurate and clear as possible.

Representative Project Assignments

- **State of Rhode Island Facility Condition, Educational Program & Energy Assessment (complete April 2017);** RI. Assessment Manager. Managed the training and daily field work of five condition assessment teams. Oversaw the review of collected data to provide quality and accuracy. Provided follow-up training and support during this long-term field assessment of 300 public school facilities in Rhode Island.
- **Fort Bend Independent School District Condition Assessment and Master Plan,** Klein, TX. Performed educational adequacy assessments and building condition assessments of various educational and administrative buildings throughout the district. Also performed data entry, data analysis and quality control utilizing MAPPS.
- **Aldine Independent School District Condition Assessment and Master Plan,** Aldine, TX. Project Coordinator. Managed the Facilities Condition Assessment and Life-Cycle Assessment of 68 facilities. Managed the data entry, data analysis and reporting utilizing MAPPS.
- **Hawaii Department of Education Statewide Facility Condition Assessment,** Honolulu, HI. Educational Adequacy Assessment Lead (Pilot). Lead the educational adequacy assessments for the pilot schools to set the standard for the remainder of the project assessments. Also performed data entry, data analysis and quality control utilizing MAPPS.
- **Klein Independent School District Condition Assessment and Master Plan,** Klein, TX. Educational Adequacy & Building Condition Assessment. Performed educational adequacy and building condition assessments of various educational and administrative buildings throughout the district. Also performed data entry, data analysis and quality control utilizing MAPPS.
- **McAllen Independent School District Condition Assessment and Master Plan,** McAllen, TX. Project Coordinator, Educational Adequacy Assessment & Building Condition Assessment. Managed the Facilities Condition Assessment and Life-Cycle Assessment of 37 Facilities.

TRACY RICHTER, REFP
Master Planning Lead



Tracy leads the educational standards and master planning portion of the scope. Tracy uses his facilitation and presentation skills to build consensus around K-12 facility planning.

Education

BA, History, Purdue University

Registrations/Certifications

Recognized Educational Facility Planner (REFP)

Professional Memberships

Council of Educational Facility Planners International (CEFPI)

Florida Educational Facility Planners Association

Work History

Overall 21 years of experience.

DeJONG- RICHTER	2000 – Present
St. Teresa School (Teacher)	1994 – 2000

With more than 20 years of teaching and educational experience, Tracy has coordinated and directed facility planning and educational specifications efforts for school districts of all sizes throughout the United States. Tracy and his team have helped more than 1,000 school districts develop outstanding learning environments through a systematic process that combines key data analysis with community participation and feedback. The resulting facility plans are not only strategic, but also include long-term goals to build a strong vision and future for the communities involved.

Representative Project Assignments

- **State of Rhode Island, Facility Condition, Educational Program & Energy Assessment; RI**
- **Fort Bend Independent School District; Sugar Land, TX**
- **Arlington Independent School District; Arlington, TX**
- **Klein Independent School District; Klein, TX**
- **Duval County Public Schools; Jacksonville, FL**
- **Broward County Public Schools; Fort Lauderdale, FL**
- **Huntsville City Schools; Huntsville, AL**
- **Milwaukee Public Schools; Milwaukee, WI**
- **School District of Philadelphia; Philadelphia, PA**
- **U.S. Department of Defense Education Activity; Washington, DC**
- Palm Beach County Public Schools; West Palm Beach, FL
- Beverly Hills Unified School District; Beverly Hills, CA
- Blue Valley School District; Blue Valley, KS
- Campbell County Schools; VA
- Cincinnati Public School District; Cincinnati, OH
- District of Columbia Public Schools; Washington, DC
- Kokomo Center Township Consolidated Schools; Kokomo, IN
- Lapeer Community Schools; Lapeer, MI
- Leavenworth Unified School District #453; Leavenworth, KS
- Montgomery Public Schools; Montgomery, AL

**Bold indicates collaboration with Jacobs*

RICK BACHMEYER
Chief Cost Estimator



As Chief Cost Estimator, Rick reviews and refines all costs associated with the facilities condition and functional suitability assessment.

Education

Bachelor of Building
Construction, Texas A&M
University

Work History

Overall 40 years of experience.

Jacobs	2009 – Present
T. Baird & Associates	2006 – 2009
C.F. Jordan	2003 – 2006
C.D. Henderson	2001 – 2003
DalMac Construction Co	1984 – 2000
Bramcon General Contractors	1981 – 1984
Rogers O'Brian Construction Co	1979 – 1981
Robert E. McKee, Inc.	1976 – 1979

Rick has 38 years of experience as a contractor and owner's representative. He has lead preconstruction, estimating, project management; and been an integral contributor to the overall business management aspect of major construction firms. His expertise includes conceptual estimating, overall project budgeting, subcontractor selection, scope of work definition and relationships between trades, constructability reviews, change order estimates and settlement negotiations, cost control systems and scheduling.

The projects he has participated in include all the contractual delivery systems; Design -Build, CM Agent, CM @ Risk, Design-Assist, Lump Sum and Guaranteed Maximum Price. Rick has lead construction projects at the preconstruction stage, contract estimate stage; and, the construction stage. An ability to build and motivate a team for the benefit of the team, the project and the Owner has contributed to the successful projects in Rick's history. Teams have consisted of estimators; design teams, project managers, estimators and superintendents; and, owners, design teams, general contractors and their subcontractors.

Representative Project Assignments

- Arlington Middle Schools; Arlington, TX; \$19.7 Million
- Fort Bend ISD Schools; Houston, TX; \$9.5 Million
- Fort Bend Natatorium; Fort Bend, TX; \$6 Million
- Berkshire Elementary; Coppell, TX; \$8.7 Million
- Grand Prairie Schools New Construction, Additions & Renovations on multiple campuses; Grand Prairie, TX; \$95 Million
- McKinney High School; McKinney, TX; \$28 Million
- Connolly High School; Pflugerville, TX; \$19.5 Million
- Quinlan High School; Quinlan, TX; \$15.3 Million
- Crosby ISD Schools Additions & Renovations multiple campuses; Crosby, TX; \$22 Million
- Falcon Creek Elementary; McKinney, TX; \$6.85 Million
- Faubion Middle School; McKinney, TX; \$8 Million
- Pflugerville Schools; Pflugerville, TX; \$20.5 Million
- Riverchase Elementary; Coppell, TX; \$8.5 Million
- Richardson 9th Grade Center; Richardson, TX; \$16.9 Million
- Richardson ISD Design Build New, Additions & Renovations at 27 campuses; Richardson, TX; \$85 Million
- Pflugerville Elementary School; Pflugerville, TX; \$4.8 Million
- East Middle School; Houston, TX; \$11 Million
- Canyon ISD Program Management; Canyon, TX; \$25 Million
- Texas School for the Deaf; Austin, TX; \$31 Million

Statement of Services (Section 5)

"[Jacobs] and DeJONGRICHTER were instrumental in the success of FBISD's comprehensive facilities study, development of a facilities master plan, district-wide feeder pattern alignment, and attendance boundary changes. Their ability to gain a deep understanding of the unique aspects of our district, and to productively engage a broad crosssection of our community around the critical data points, along with a constant dedication to the students in our District helped us to gain broad support around often challenging issues."

*Beth Martinez, Fort Bend
ISD, Human Resources,
Executive Director Talent
Management*

General Overview

As the industry leader in K-12 facility condition assessments and capital planning, we have refined our project approach into an efficient, structured methodology over the course of serving 23 of the largest 100 school districts, comprising over one billion SF of schools.

While your objectives are similar to those of other school districts we serve nationwide, we recognize that this project demands a tailored approach in order to achieve your objectives. We've summarized our technical approach below, emphasizing the unique aspects of our plan and value-add strategies that reduce costs and maximize the benefits arising from this project. This work plan demonstrates our coordination of the work components by describing the sequence and inter-relationship of activities that result in the OUSD Facility Master Plan.



Our workplan is organized as follows:

1. Kick Off, Plan for Planning, Data Gathering
2. Educational Framework / Facility Standards
3. Facility Portfolio and Capacity Analysis
4. Pilot Assessment
5. Educational Adequacy Assessment
6. Building Condition Assessment
7. Facility Master Planning

We intend to structure our team as presented in Tab Four (Key Personnel) for all phases of your project.

Value Added for the School District of Philadelphia

For the School District of Philadelphia, Jacobs and DeJONG-RICHTER pulled assessment data from client sources and compiled into our MAPPS application. The data was reviewed with district staff for current relevance. Priorities for deficiencies as well as cost values were evaluated and refreshed to account for escalation and changes in construction market pricing. These costs, in addition to revised replacement values for schools within the district, were used to develop new Facility Condition Indices (FCI). These new FCIs served as one of the important metrics of evaluation for the District's facilities when determining the overall plan for the schools.



Specific Approach to the OUSD Facility Condition Assessment & Master Planning Project

The goal of this project is to provide an updated Master Plan for OUSD as it specifically relates the planning and construction of additions to existing school sites, modernization, reconstruction, or renovation of existing schools, District facilities and new school construction. The following key activities will be used to inform the master plan update: Educational Adequacy Assessment; Facilities Condition Assessment; ADA Self-Evaluation and Transition Plan; Demographic Study & Analysis and Deferred Maintenance Plan. The approach to executing these activities is described on the pages that follow:

1. Kick Off, Plan for Planning, Data Gathering

We launch all of our projects with interactive kickoff activities in which we confirm OUSD priorities, stakeholders, expectations and the preliminary work plan. Since there are several sessions that may involve either district administrators or community members or both, we identify the form and format for these sessions so that long-lead items can be initiated. At this point we request and begin collecting background data and information.

2. Educational Framework / Facility Standards

Shortly after contract award, we facilitate a stakeholder forum ideally attended by OUSD's Superintendent and key curriculum and facility leaders to gain an understanding of the District's overarching educational goals. We explore fundamental educational and operational framework concepts such as school size, student choice, grade configurations, magnet programs, teacher union requirements, portable classroom policy and the structure of your instructional modalities as they pertain to facilities. Following the forum, we conduct sessions to collect and define educational adequacy standards, facility standards and technology standards, described in more detail below.

3. Facility Portfolio and Capacity Analysis

Space Inventory: To help confirm that your facility master plan is appropriately suited to address the needs of your students, it's critical that we develop and/or validate the capacity of your schools. We accomplish this by documenting and field-verifying a space inventory of all instructional and core spaces, including location, SF area and functional use.

By sequencing space inventory field verification simultaneously with the educational adequacy assessments, and ahead of Building Condition Assessments (BCA), the assessment results benefit from a BCA informed by accurate building/room inventories.

If desired, we are also equipped to link our assessment platform to Revit/CAD model, enhancing the accuracy of measurements and providing printable tools for sundry facility management functions.

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Capacity: We compile your space data in our MAPPS software, configured to match your ed-spec standards by room use and school type. After setting aside rooms that serve for ad-hoc pull-out resource programs, we apply prorated area-adjustments to any grossly undersized classrooms and utilization factors reflective of the specific curriculum and schedule for each school type, yielding three distinct educational capacity measures for each campus, reflecting a realistic and equitable number of students that can be reasonably accommodated by each school:

- **Permanent Capacity** – capacity of permanent buildings
- **Temporary Capacity** – capacity of portable buildings
- **Recapturable Capacity** – capacity of classrooms used for non-instructional purposes that could be converted into potential capacity if the current program is relocated.

Our enrollment projections provide a valuable low cost third-party validation of fundamental planning data, and could reduce risks of misinformed capital decisions.

Enrollment Projections: Based on the RFP's scope requirement, we deploy DeJong-Richter's experienced K-12 demography experts to perform a peer review of OUSD's enrollment projections to confirm your assumptions, methodologies and calculations. If required, we also have the capability and specialized K-12 GIS experts in order to perform a complete update of your enrollment projections to include development of 10-year projections.

Capacity Utilization: We divide the current and projected enrollment into each school's factored capacity to calculate capacity utilization. Our utilization factoring strategy normalizes all schools so that 100% capacity utilization reflects optimal enrollment for all school types.

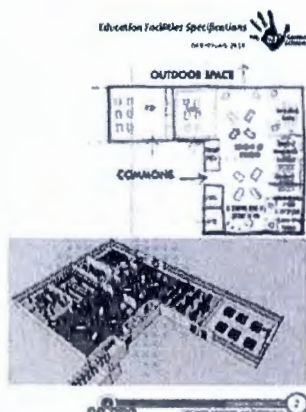
Core Capacity: Because many schools have evolved over time with numerous classroom additions, we also analyze the capacities of your core facilities such as the cafeteria, library and gymnasium, verifying the capital plan considers more than just classroom capacity.

Figures 1, 2 and 3 below, are infographics illustrating our approach to showing capacity utilization imbalance within a sample district.



Figure 1: Using Tableau data visualization tools, we have performed preliminary analytics on available datasets to identify geographical pockets of capacity over- and under- utilization.

Jacobs managed and facilitated the development of the Department of Defense Education Activity (DoDEA) 21st Century Educational Specifications, marshalling several national leaders in educational design.



4. Pilot Assessment

We advocate for a deliberate trial assessment of a representative sample of schools followed by a brief process and data quality review before rolling out the assessment of all facilities. This proactive strategy provides various benefits to OUSD, including:

- Validating assessment process and site access logistics.
- Validating that assessment data and standards provide desired granularity and utility of findings.
- Calibrate assessors to OUSD standards.
- Identify additional custom no-cost/high-value facility aspects to add to the assessment.
- Gain OUSD stakeholder confidence and buy-in.

5. Educational Adequacy Assessment

We perform an evaluation of all OUSD schools using an objective and repeatable standards-based approach that generates a catalog of cost-estimated and actionable educational building deficiencies.

Based on input from the Educational Framework, we develop quantifiable assessment standards for fundamental educational adequacy as well as support for modern instruction techniques for each school level and specialty program. After a field pilot and review exercise, we deploy specialized K-12 assessors equipped with innovative tablet data collection devices to visit each school and inventory campus and instructional space elements in order to determine what exists at each location. The findings are compiled into our MAPPS database to compare the field-verified existing conditions against standards developed during the Educational Framework sessions.

Using our database to prepare a prioritized actionable deficiency listing along with repair costs, we also calculate Educational Suitability Scores (ESS) used to rank and prioritize campus modernization projects. Since the analysis is based on agreed-upon standards, the assessment is very objective and repeatable in future studies.

Each school's ESS is based on weighted categories and criteria that we develop in collaboration with you. Typical categories are:

- **Capacity:** Ability of classrooms and core facilities to meet the needs of the student population.
- **Support for Programs:** Provision of special that support specific curriculum offerings and programs.
- **Technology:** Presence of wired and wireless infrastructure and equipment.
- **Supervision and Security:** Extent to which building and systems help or hinder security and safety.
- **Instructional Aids:** Presence of fixed equipment within classrooms.
- **Physical Characteristics:** Sizes and shapes of classrooms.
- **Learning Environment:** Degree to which learning areas are comfortable, well lit, odor free, controllable and quiet.

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- **Relationship of Spaces:** Effective and efficient design of spaces for optimal operational and educational functions.

6. Facility Condition Assessment

The Facility Condition Assessment (FCA) is performed by a team of architects and engineers who visit each facility to evaluate each building's overall condition, including its site, roof, structural integrity, the exterior building envelope, the interior and the mechanical, electrical and plumbing systems. The teams identify existing deficiencies and document current deficiencies and life-cycle (future capital renewal) requirements.

The condition assessment data collection is typically preceded by a review of facilities and issues with maintenance staff and other knowledgeable district stakeholders. We realize that no one knows the buildings as well as those who work with them every day. It is key to incorporate this institutional knowledge to achieve the most accurate reflection of the conditions of OUSD schools. This review is typically performed over a few days with our management team so that we can build a foundation of condition items from which our building professionals can work. We also engage local representatives such as the Principals and custodial staff at the time of the assessment to confirm their concerns are incorporated.

We use our MAPPS field data collection program to capture facility condition data directly into the MAPPS database, along with the associated priorities, categories and cost estimates. Our assessors are supported in the office by a quality control team and cost estimators to scrub the data and complete the assessment.

We understand the importance of respecting each school's unique programs, activities and needs, and we minimize disruption to campus activities as much as possible, such as scheduling assessments to avoid standardized test days.

The final phase of the assessment phase is to compile all of the deficiency needs and identify the priority of the repair in accordance with parameters defined during the planning phase. After a review cycle with OUSD stakeholders, we revise any priorities that have changed during the course of the assessment. The team uses the database programmed with RSMeans Construction Cost Data adjusted to the local Oakland market, to prepare cost estimates for all correctable deficiencies. From here, a master budget is prepared and an implementation schedule, or ranking of campuses, is developed to assist the school in allocating campus modernization funds among projects.

10-Year Need and Facility Condition Index. Combining the current educational adequacy and building condition/deferred maintenance repair costs with the 10-year life-cycle renewal forecast yields total 10-year need. Consistent with industry standard, we divide these costs into the cost of facility replacement value to generate FCIs for each building and campus. (Costs associated with additions, new construction and program enhancement projects are not a component of the initial assessment findings, but are developed during subsequent Master Planning activities.)

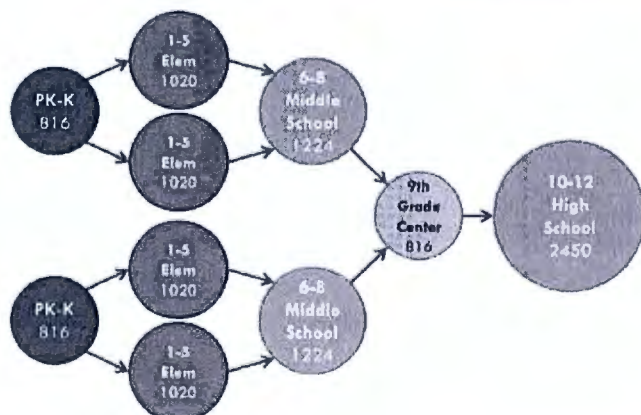


Weighted Priority In addition to the traditional FCI value associated with building condition assessments, Jacobs calculates a weighted priority for each building that takes into account the severity, or priority, of repairs and deferred maintenance required. While two buildings may have very similar FCIs, their needs may vary greatly in priority. One facility may need updates to finishes, interior specialties and plumbing items while the other facility's needs are manifested in the building envelope and HVAC systems. The latter facility has greater need based on those items and their impact to the operation of the facility. This facility should be ranked higher in the prioritization methodology. By weighting the needs to calculate this priority, we derive a much more accurate index to use in the prioritization of the facility within the portfolio.

7. Facility Master Planning

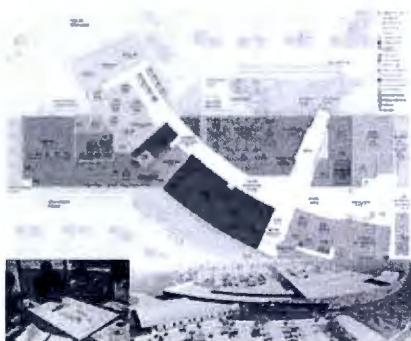
Options Planning. Based on information collected during the assessment, we facilitate an interactive planning process involving the participation of key District facility and educational leadership. All key formative documents are reviewed in detail including capacity utilization, attendance boundaries and student choice patterns, facility condition, educational adequacy, available properties and annual operational costs. We review data by each High School Cluster or

other grouping and vertical program alignment, as well as each campus. We explore your challenges and opportunities and develop operational and capital options that optimize student opportunity. Recent examples of the types of options we helped our clients facing similar challenges include:



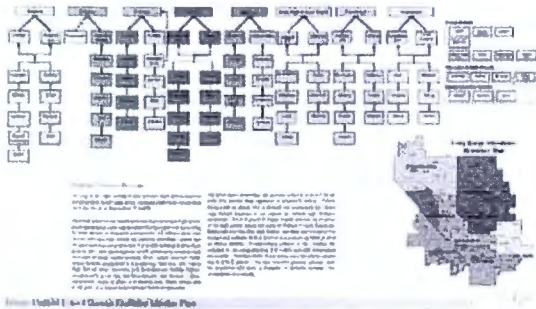
Grade reconfiguration. When we developed the facility master plan for Aldine ISD, one of the fastest growing districts in greater-Houston, we leveraged the need for several new schools into a districtwide operational grade re-configuration that provide education and accountability improvements for teachers, administrators and students. By eliminating 5th-6th grade

Intermediate Schools and introducing a PreK-K configuration districtwide, we were able to expand on the District's highly successful early education program and empower elementary school leaders to prepare their students for the student assessments for which they are accountable. Moreover, the former Intermediate School facilities could be repurposed as 1st-5th grade elementary schools with minimal capital investment.



Creating a new high demand career program. Arlington ISD in the Dallas-Fort Worth Metroplex confronted regionalized capacity underutilization challenges similar to Oakland's. During options planning, we developed an innovative solution to repurpose a middle school with declining enrollment and less than 50% utilization as a state of the art open enrollment Career Tech Education High School,

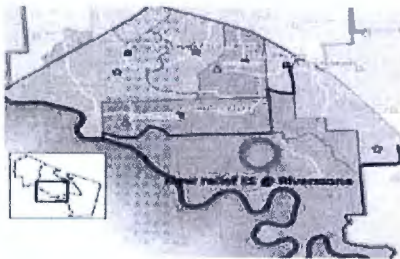
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a program that we had confirmed to be in high demand in our stakeholder engagement meetings. By consolidating middle school enrollment and introducing an exciting new program into underutilized facilities, we brought facility balance and new student opportunities to Arlington ISD.

Attendance boundary adjustments. To the extent possible we seek no-cost facility options to help our clients balance capacity utilization. Similar to OUSD's current scenario, Fresno USD had several schools in close proximity experiencing opposite utilization patterns, and imbalanced and split feeder patterns. We proposed relocation of attendance boundaries to balance utilization between adjacent schools, with no capital cost requirement.

Community Engagement (Optional). A hallmark of our projects is the overt commitment to transparency and stakeholder engagement that we weave into the planning process. We help the District assemble a Stakeholder Steering Committee representing a broad cross-section of the community that participates in and facilitates the development of the facility master plan (FMP). Central to the planning process are two community dialogue meetings, to which the entire OUSD community is openly invited. Steering Committee members facilitate small discussions and working groups to gain information. During the first community dialogue meeting (CD1), we present background data and conduct a paper and online survey focused on District values and educational framework concepts. The results of the CD1 survey are reviewed and considered by the planning team and Steering Committee in drafting multiple facility options for each school. During the second community dialogue meeting (CD2), we present stakeholders the first survey results and facility options, discuss these options in small group discussion format and complete a second questionnaire about each community member's opinions and preferences. Finally, results of the CD2 surveys are given strong consideration by the planning team and Steering Committee to distill the options into a singular set of FMP recommendations.



Facility Master Plan. Once the results from the options planning process are vetted by stakeholders, the planning committee reconvenes to distill the various operational and capital options into a singular set of FMP recommendations. A final report outlines both operational and prioritized capital actions for each of OUSD's facilities. Approximate cost of renovations, instructional technology improvements and educational and operational enhancements.

Firm Information (Section 6)

In the past 15 years alone, we have assessed over one billion square feet of facilities for K-12 clients.

Brief Firm History

Since our company's founding by Joseph J. Jacobs in 1947, we have gradually evolved from a one-man engineering consultant to the publicly-traded Fortune 500 company we are today.

About two-thirds of our consistent growth comes from organic expansion as we serve the changing and growing needs of our customers. Because we partner with our clients and truly understand their business objectives, we work where they need us to be and we position ourselves to serve their needs effectively.

Our rich history and dedication to achieving our clients' success guide our growth. But a few simple things remain constant throughout times of change: our firm commitment to our relationship-based business model and our focus on safety, quality and ethics are foundational to who we are.

Serving California Since 1945

Jacobs has been a fixture in California since 1945, with our headquarters located in Pasadena. Oakland is home to our growing Jacobs office, where more than 100 professionals are based and support a variety of projects in the Bay Area. Our Oakland office located downtown less than one mile from your headquarters.

Our proximity to your headquarters means we are there when you need us. We do not require temporary facilities on your property, saving you money over our competition without a local presence.

Facility Condition Assessment and Master Planning History

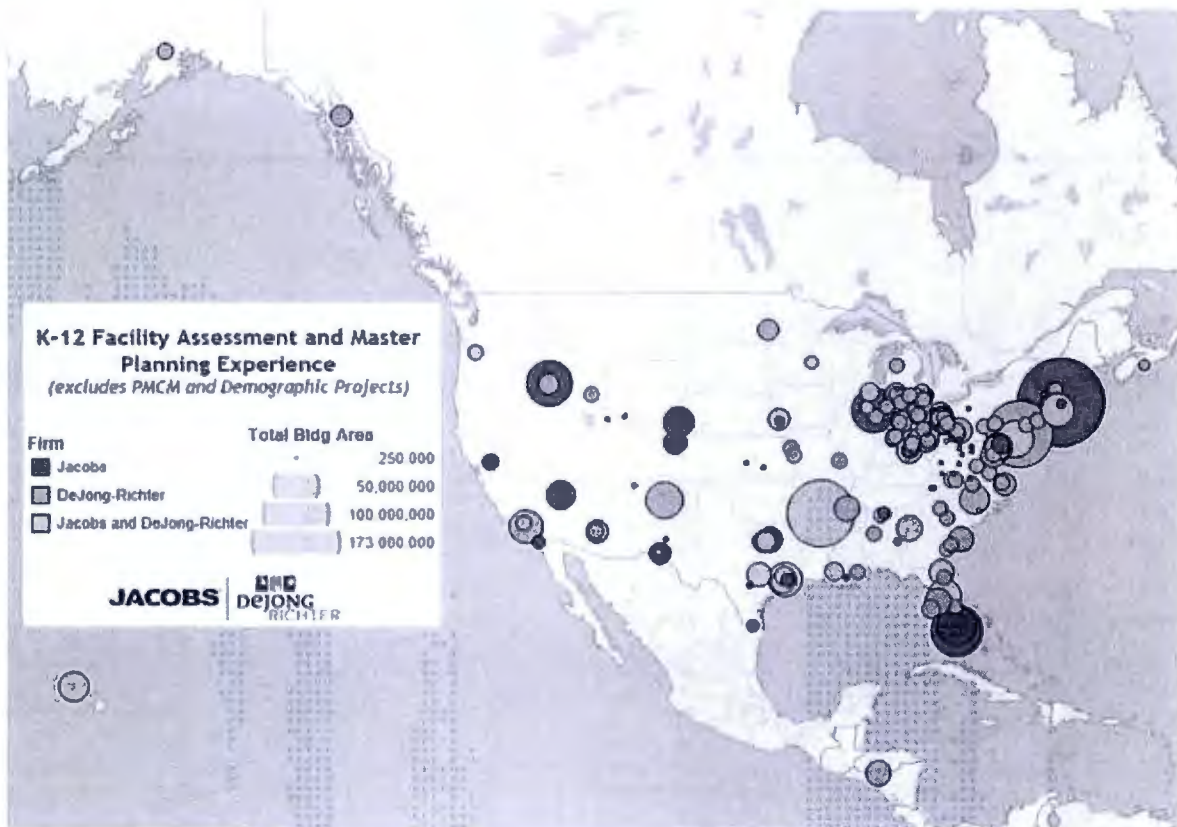
For Jacobs, FCA and master planning services are core services. We started providing master planning services in the 1960s and assessments services in the 1990s. In addition to K-12 clients, we execute these services for a wide variety of clients including the United States Air Force, Los Angeles World Airports, City of Atlanta and MD Anderson Cancer Center. There is likely no facility related issue that we have never seen before.

K-12 FOCUS

We have extensive experience providing facility condition assessment and master planning services to K-12 clients. We work with our clients to meet their goals and expectations, follow their guiding principles and help prioritize capital needs and make informed capital decisions.

Jacobs' standing as the trusted industry leader in K-12 capital planning, assessments and project delivery was earned by serving more than 13,000 of the nation's 98,000+ public schools, representing roughly one in eight schools. In total, we have assessed over one billion square feet of K-12 space in the last 15 years, more than all of our competitors combined.

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Financial Resources

Year	Annual Revenue	# of Clients
2015	\$12,114,832,000	6,615
2014	\$12,695,157,000	6,570
2013	\$11,818,376,000	4,740
2012	\$10,893,778,000	5,170
2011	\$10,381,664,000	4,900

Wall Street consistently recognizes Jacobs as one of the best-run firms in the engineering and construction industry. With \$12.1 billion in revenues in FY15, we attribute our successful growth and ongoing expansion to our relationship-based approach – with most of our work derived from long-term partnerships with clients. The combination of a loyal client base and steady growth is what enables us to attract and retain the industry's top talent for delivery to our clients. As a result of our sound business philosophy, we are prospering in diverse markets worldwide. Our annual revenues for the past ten years are as follows:

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Claims Filed

The Submitting Firm, Jacobs Engineering Group Inc., and its subsidiaries form an organization that is comprised of approximately 125 operating companies and affiliates, having a total current employment complement of over 60,000 persons and revenues of more than \$12 billion. From time to time and in the ordinary course of its business, the Company is subject to various claims, disputes, terminations, arbitrations, and other legal proceedings. It is the Company's practice to vigorously defend itself in such actions, many of which are generally subject to insurance and none of which are expected to have a materially adverse effect on the Company's consolidated financial statements.

Current Commitments

Below are the projects where our firm is currently engaged with K-12 clients. Our team currently has ample capacity to provide services for the OUSD FCA and Master Planning Services project in addition to these.

Current Project	Dollar Value	Time Frame
Rhode Island Dept. of Education Statewide Assessment	\$4.3M (\$700k remaining)	Completes in April 2017
Massachusetts School Building Authority Statewide Needs Survey	\$800k (\$650k remaining)	Completes in June 2017
Hawaii Dept. of Education Statewide Assessment	\$4.6M (\$675k remaining)	Completes in March 2017

References

Below are the projects where our firm is currently engaged with K-12 clients. Our team currently has ample capacity to provide services for the

Contract Name	Location	Owner Name	Current Client Contact
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Fresno

Fulton County
Schools Facility
Condition
Assessment &
Master Plan

Atlanta,
Georgia

Fulton County
Schools

Patrick Burke, Deputy
Superintendent of Operations
6201 Powers Ferry Road NW
Atlanta, GA 30339
470.254.8998
burkep@fultonschools.org

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Aldine ISD Facility Condition Assessment & Master Plan	Houston, Texas	Aldine Independent School District	Dr. Archie Blanson, Deputy Superintendent of Operations 2520 W.W. Thorne Dr. Houston, TX 77073 281.449.1011 ablanson@aldine.k12.tx.us
Klein ISD Facilities Condition Assessment & Master Plan	Klein, Texas	Klein Independent School District	Robert N. Robertson, Associate Superintendent Facility & School Services 7200 Spring Cypress Road Klein, Texas 77379 832.832.249-4520 robertson1@kleinisd.net
Miami-Dade County Public Schools Assessment & Master Plan	Miami, Florida	Miami-Dade County Public Schools	Rolando Necuze, RA, Director, Advance Planning 13135 SW 26th St. Miami, FL 33175 305.995.4562 rnecuze@dadeschools.net
Fort Bend ISD Facilities Condition Assessment & Master Plan	Sugar Land, Texas	Fort Bend Independent School District	D. Allen Bassham, Executive Director Facilities & School Services 2323 Texas Parkway Missouri City, TX 77489 281.634.1871 david.bassham@fortbendisd.com

Prior Relevant Experience (Section 7)

Our experience with projects similar to yours makes our team best suited to support improved stewardship of your facility assets and provide the best value for your investment.

Each of the projects featured in this section utilized our structured MAPPS database software solution to track and address school districts' deferred maintenance backlogs.

We implement innovative assessment strategies that are objective, standards-based and customizable. If needed, we vary the level of detail based on age of a given facility, modelling/representative sampling and a compilation of known critical needs. This provides you with data at a lower cost yet still provides the defensible transparency that allows your stakeholders to rest easy at the end of the day.

OUSD can expect credible, actionable results as demonstrated by this team's proven performance on dozens of relevant K-12 assessment and master planning engagements through which Jacobs and DeJong-Richter have helped public school districts build the case for more than \$5.2 billion in public funding since 2011. Working together, we accomplished this by building consensus around solutions that uphold district priorities based on consistent, accurate facility data under a structured planning methodology.

On the next pages, we have provided the below five projects in more detail. These projects have scopes strikingly similar to yours, and showcase our experience in providing assessments and master planning services for K-12 education clients.

Fulton County Schools

Our facility condition assessments and master planning services provided a foundation for the district to achieve overwhelming success on their sales tax referendum **with a 77% approval by voters**. Additionally, our assessments and master planning team collaborated with our project management services team to continue implementation of a highly successful program that fully meets Fulton County's needs.

Aldine Independent School District

We implemented a comprehensive approach to assessments in this urban district with aging facilities. Our input resulted in a **72% voter approved** public referendum for \$798M in capital funding, and the resulting master plan greatly improved their approach to curriculum delivery.

Klein Independent School District

This district engaged our team to create a customized approach to assessing their facilities. After collaborating with stakeholders to best understand their needs, we tailored our assessments to meet campus-specific needs and goals to provide defensible data to back their \$498 million bond program. The resulting public support has led to an increase in funding, providing better outcomes for their students.

Miami-Dade County Public Schools

We have supported this district for 12 years with assessments and master planning services. When we first engaged with them, they were grappling with their deferred maintenance backlog. Now, our software solution is the backbone of their district information systems. Our services continue to support Miami-Dade's \$1.2 billion capital program.

Fort Bend Independent School District

Fort Bend ISD is a similarly sized district to yours. We implemented a planning approach with both the staff and the community that resulted in a successful \$435 million bond referendum. Our on-going management of condition data with our MAPPS software application continues to support the district to this day.

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In addition to these five, the table below provides a representative sampling of the school clients nationwide who have entrusted us with their facility assessments, master planning and capital planning needs over the past five years.

Selected K-12 Assessment & Master Planning History
(✓ collaboration with Jacobs and DeJong-Richter, * in progress)

Selected K-12 Assessment & Master Planning History (✓ collaboration with Jacobs and DeJong-Richter, * in progress)				Relevance to OUSD						
				Condition Assessment	Software Implementation	Master Plan	Educational Adequacy	Enrollment Projections	Bond/Financial Planning	Community Engagement
District	Year Complete	# of Schools	GSF							
Profiled Projects:										
✓ Fresno County Schools, Atlanta, GA	2009	97	9.8M	■	■	■	■		■	■
✓ Fulton County Schools, Atlanta, GA	2016	99	14M	■	■	■	■		■	■
✓ Aldine Independent School District, Houston, TX	2015	73	9.2M	■	■	■	■		■	■
✓ Klein Independent School District, TX	2015	59	6.2M	■	■	■	■	■	■	■
Miami-Dade County Public Schools, Miami, FL	2013	200	20M	■	■	■			■	
✓ Fort Bend Independent School District, Sugar Land, TX	2014	91	11M	■	■	■	■		■	■
Additional Experience:										
Elk Grove Unified School District, CA	2015	65	5.2M	■	■					
Sweetwater Union HS District, Chula Vista, CA	2014	33	4M	■	■	■	■			■
Massachusetts School Building Authority Statewide Assessment* (addl. assessments in 2006 & 2010)	2017	1,800	173M	■	■		■		■	
Polk County Public Schools	Ongoing	124	16.8M					■		■
✓ Duval County Public Schools	Ongoing	158	14.5M			■		■		■
✓ Rhode Island Dept. of Education Statewide Assessment*	2017	300	20M	■	■		■	■	■	■
Manatee County Public Schools	2016	57	7.9M			■		■		■
✓ Canutillo Independent School District, El Paso, TX	2016	12	1.8M	■	■	■	■	■	■	■
✓ Hawaii Dept. of Education Statewide Assessment*	2016	271	25M	■	■		■	■	■	■
Ysleta Independent School District, El Paso, TX	2015	60	4.5M	■	■		■		■	■
✓ El Paso Independent School District, TX	2015	93	10M	■	■	■	■	■	■	
Chicago Public Schools, IL	2015	385	28.9M	■		■				
Broward County Public Schools, Fort Lauderdale, FL	2014	222	23M	■	■	■	■		■	
Orange County Public Schools, Orlando, FL	2014	145	10.9M	■		■	■			
✓ Omaha Public Schools	2014	88	9.5M	■	■	■			■	
✓ Bellevue Public Schools	2014	25	1.9M	■	■	■	■		■	
✓ Arlington Independent School District, TX	2014	89	7.3M	■	■	■	■		■	■
McAllen Independent School District, TX	2014	32	3.3M	■	■	■	■		■	
✓ Houston Independent School District, TX	2013	250	33M	■	■	■	■	■	■	■
Dallas Independent School District, Dallas, TX	2013	182	15M	■		■			■	■
✓ Auburn Public Schools, AL	2013	20	1.5M	■		■	■			■
San Antonio Independent School District, TX	2012	26	2.5M	■	■	■	■			
✓ Baltimore City Public Schools, MD	2012	160	19M	■	■	■	■	■		■
✓ Huntsville City Schools, AL	2012	26	2.5M	■		■	■			
✓ School District of Philadelphia, PA	2012	286	30M	■		■			■	■
✓ Milwaukee Public Schools, WI	2011	140	18M	■	■	■	■			

Fulton County Schools Facility Condition Assessment & Master Plan

ATLANTA, GEORGIA

Fulton County is an urban district in the southeastern US, similar in size to OUSD. We provided them with a condition and adequacy based prioritization of their schools along with cutting-edge facility technology that provides management infrastructure for optimized future capital programs. With our FCA data and Master Plan as a foundation, the district achieved overwhelming support for their sales tax referendum.

Relevance to OUSD:

- ▶ Jacobs / DeJONG/Richter Project
- ▶ Facility Condition Assessment
- ▶ Functional/Educational Adequacy
- ▶ Capacity Analysis
- ▶ MAPPS Software Implementation
- ▶ Facility Capital Master Planning
- ▶ Enrollment and Demographic Analysis
- ▶ Stakeholder Engagement

Completion

March 2016

Reference Contact

Patrick Burke
Deputy Superintendent of Operations
Fulton County Schools
6201 Powers Ferry Road NW
Atlanta, GA 30339
470.254.8998
burkep@fultonschools.org

"The team has standardized tools to assist the FCS staff in the assessment of our facilities. Given the ever-changing nature of the construction market in Atlanta, having sound data to evaluate scope against budget among projects in a program is essential."

Patrick Burke, Deputy Superintendent of Operations, Fulton County Schools



Firm's Responsibility/Services Provided:

Our team executed a comprehensive assessment of 99 school and administrative sites in preparation for a sales tax referendum for Fulton County Schools (FCS) in greater Atlanta, GA.

- The project included reviewing existing educational specifications, educational adequacy and condition assessment, master planning and community engagement.
- To perform the educational adequacy assessment, we worked with District leadership to refine existing educational standards; and our teams visited the schools to gather facility data and perform gap analysis against standards.
- Additional teams of building professionals identified building system needs based on system and component evaluations. We deployed our MAPPS software that we used to inform capital planning and assist the District in managing capital and deferred maintenance needs in the coming years.

Value Added:

In addition to providing facility assessment services to FCS, we are providing program and construction management services in support of the District's \$976 million Capital Improvement Program.

This project worked hand-in-hand with the implementation of another contract where our project implementation specialist, John Dougherty, worked with our team providing these up-front planning services while Jacobs simultaneously fulfilled a program and construction management role.

Fresno Unified School District Facility Master Plan & Condition Assessment
FRESNO, CALIFORNIA

Fresno Unified School District is a large, urban district located in the San Joaquin Valley, similar in size to OUSD. Serving over 73,000 students, the district has rich cultural and ethnic diversity creating unique but rewarding challenges. To assist in the overall vision of the education program, the district acknowledged the strong influence that the physical environment has upon learning and teaching. We provided them with a condition and adequacy based prioritization of their schools for optimized future capital programs.

Relevance to OUSD:

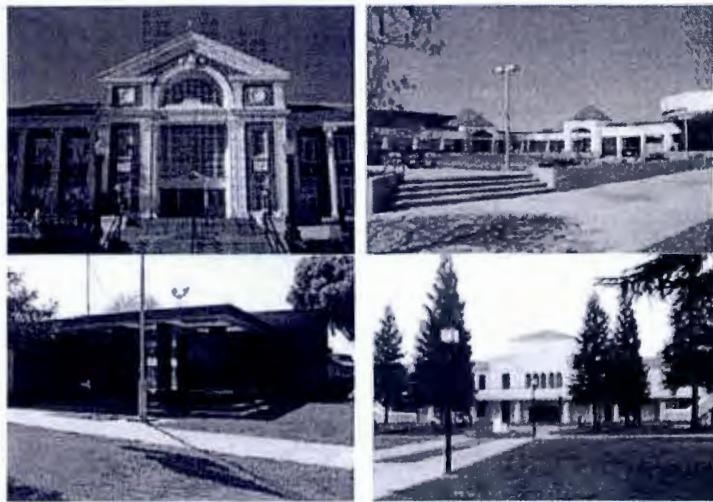
- ▶ Jacobs Project
- ▶ Facility Condition Assessment
- ▶ Functional/Educational Adequacy
- ▶ Facility Capital Master Planning
- ▶ Enrollment and Demographic Analysis
- ▶ Stakeholder Engagement

Completion

April 2009

Reference Contact

Lisa LeBlanc
Executive Director
Facilities Management &
Planning
559.457.6126
lalebla@fresno.k12.ca.us



Firm's Responsibility/Services Provided:

As in most districts over the past decade, Fresno USD experienced many years of exceptional growth, physically answered by the placement of multiple portable structures on most of the school sites, creating overcrowding and site limitations. The district acknowledged the need to develop a comprehensive Facilities Master Plan (FMP) as a means of planning and anticipating potential improvements and their funding requirements. The FMP assisted the district to achieve a common equitable base for the district facilities and to anticipate future needs. The plan addressed current facility conditions and suitability, and identified facility improvements to support student engagement and, most importantly, academic achievement.

Value Added:

This plan, as envisioned by the Board, Facility Ad Hoc Advisory Committee (FAAC) and staff, joins the educational programs of the district, with the physical planning of the district facilities. The district's "roadmap to excellence" was established as the overall direction of the district for educational goals. The FMP provided a visionary, "world class" guideline for improvement of district facilities.

Aldine Independent School District Facility Assessment & Master Plan

HOUSTON, TEXAS

Aldine ISD is an urban district with aging facilities. We provided a comprehensive approach, leveraging a facilities solution into improved districtwide operations and enhanced student educational opportunities. The resulting master plan helped the district transform their own approach to curriculum delivery in order to enhance the experience for their students and staff.

Relevance to OUSD:

- ▶ Jacobs / DeJONG/Richter Project
- ▶ Facility Condition Assessment
- ▶ Functional/Educational Adequacy
- ▶ Capacity Analysis
- ▶ MAPPS Software Implementation
- ▶ Facility Capital Master Planning
- ▶ Enrollment and Demographic Analysis
- ▶ Stakeholder Engagement

Completion
August 2015

Reference Contact
Dr. Archie Blanson
Deputy Superintendent of Operations
2520 W.W. Thorne Dr.
Houston, TX 77073
281.449.1011
ablanson@aldine.k12.tx.us



Firm's Responsibility/Services Provided:

Facing sustained enrollment growth of more than 2,100 students a year and aging, under-equipped school buildings marked by significant deferred maintenance backlog, Aldine enlisted Jacobs and DeJong-Richter to deliver its first comprehensive facility assessment and development of its 2015 Facility Master Plan.

- The plan prescribed \$1.6 billion in capital projects including new construction for capacity growth, critical repairs, technology infrastructure and grade reconfigurations to facilitate the District's operational transformation.
- Our focus on equity and transparency yielded overwhelming public support as proven by a 72% approval margin in the District's \$798 bond election in 2015.
- We implemented rapid deployment of four interdisciplinary assessment teams to meet an aggressive project schedule.
- In the interest of saving AISD more than \$25,000 in fees, Jacobs developed a hybrid scalable approach that dialed-in the depth of assessment to school age and mission priority.

Value Added:

While exploring facility options under Jacobs' structured planning process, District leadership came to the consensus that the solution to facility challenges provided an opportunity to implement previously unthinkable operational reforms that achieve cohesive school feeder patterns and sustained student relationships, reduced student transitions, heightened school accountability and improved educational programming.

Klein Independent School District Facility Condition Assessment & Master Plan KLEIN, TEXAS

We supported Klein ISD with a customized approach to assessing their facilities based on individual campus needs. Through our objective and transparent process, we achieved stakeholder trust and support for public funding.

Relevance to OUSD:

- ▶ Jacobs / DeJONG/Richter Project
- ▶ Facility Condition Assessment
- ▶ Functional/Educational Adequacy
- ▶ Capacity Analysis
- ▶ MAPPS Software Implementation
- ▶ Master Planning
- ▶ Enrollment Analysis
- ▶ Stakeholder Engagement
- ▶ Space Inventory
- ▶ Bond Planning

Completion
May 2015

Reference Contact
Robert N. Robertson,
Associate Superintendent
Facility & School Services
Klein Independent School
District
832.249.4520
rrobertson1@kleinisd.net



Firm's Responsibility/Services Provided:

We led the 2014 assessment for the Klein ISD's Facility Master Plan. Prior to beginning the assessments, our team worked with the district to gather historical information on their facilities. Teams were sent into the field to complete comprehensive educational adequacy and building condition assessments. We also converted and upgraded the district's site and floor plans to CAD drawings, developed educational specifications and updated the district's vision. 10-year enrollment projections were prepared for the district, which has been experiencing an increase in enrollment. Applying this data and working through a community engagement process, we developed an overall master plan to address the needs at their campuses. Throughout the master planning process we worked closely with the district and involved the community to create a sense of ownership in the community for the district and their vision.

Value Added:

We carefully incorporated Klein ISD's internal knowledge of their facilities into the assessment process, providing accurate and reliable data. By utilizing our assessment process, tailored with h district knowledge we provided a transparent process that stood up to public scrutiny. We have provided Klein ISD with customized reports to effectively communicate the districts need in an effort to educate the community while working towards passing a Bond program.

Klein ISD benefited from our overall process. They were looking for defensible quality data, which we provided. Our standards driven, repeatable process brought consistent and reliable data. The community engagement process brought transparency to the entire process and showed our data could withstand public scrutiny. Overall we built a significant amount of confidence in the bond proposal with district staff and the community.

Miami-Dade County Public Schools Assessment & Master Plan
MIAMI, FLORIDA

Miami-Dade is an urban district grappling with a deferred maintenance backlog. For 12 years, we have supported the district by providing technology and data management infrastructure for multiple District-performed assessments and State FISH updates.

Relevance to OUSD:

- ▶ Facility Condition Assessment
- ▶ MAPPS Software Implementation
- ▶ Facility Capital Master Planning
- ▶ District Staff-Supported Assessment

Completion
May 2013

Reference Contact
Rolando Necuze, RA
Director, Advance Planning
13135 SW 26th St.
Miami, FL 33175
305.995.4562
rnecuze@dadeschools.net

"In our business it is rare to find such exceptional partners and caring individuals. They [Jacobs] continue to support the District and the application long after it has been implemented. They are always quick to respond to inquiries, available to help with issues and never hesitate to spend the time to suggest solutions. They are truly professionals and know how to do their work effectively and efficiently."

*Debbie Karcher, Chief
Information Officer,
Information Technology
Services, Miami-Dade
County Public Schools*



Firm's Responsibility/Services Provided:

Jacobs has been providing technology and support services to Miami-Dade County Public Schools (MDCPS) continuously since 2004.

- In 2004, 2007 and 2011, we developed processes to assess 335 schools to support their district's \$3.3 billion capital improvement plan. We provided our assessment methodology, MAPPS facility software, staff training and management that allowed MDCPS employees to self-perform all field assessments and data entry.
- Our innovative methodology leveraged their in-house institutional knowledge and staffing capacity to achieve a low-cost, high-value facility assessment solution.
- We implemented an online QA/QC tool, providing increased data quality and transparency to their leadership.

Value Added:

Our MAPPS facility software is fully integrated with the State of Florida's F.I.S.H. (Florida Inventory of School Houses) system, saving Miami-Dade significant time and expense to fulfill State-mandated facility inventory updates.

Fort Bend Independent School District Facilities Condition Assessment & Master Plan SUGAR LAND, TEXAS

Fort Bend ISD is similar in size to OUSD. Our services equipped this public school district with objective facility data to prove the case for increased capital funding and prioritized maintenance. We continue to provide ongoing management of condition data through our MAPPS software solution.

Relevance to OUSD:

- ▶ Jacobs / DeJONG/Richter Project
- ▶ Facility Condition Assessment
- ▶ Functional / Educational Adequacy
- ▶ Capacity Analysis
- ▶ MAPPS Software Implementation
- ▶ Facility Capital Master Planning
- ▶ Enrollment and Demographic Analysis
- ▶ Attendance Boundary Changes
- ▶ Stakeholder Engagement

Completion
November 2014

Reference Contact
D. Allen Bassham
Executive Director Facilities
and School Services
2323 Texas Parkway
Missouri City, TX 77489
281.634.1871
david.bassham@fortbendisd.com

"With the objective data Jacobs collected, FBISD is better equipped to prioritize our maintenance and capital funding for years to come. The transparency and objectivity of the entire process affords us the opportunity to demonstrate our commitment to our students and our community."

*Max Cleaver, Former Chief
Operating Officer, Fort Bend
Independent School District*



Firm's Responsibility/Services Provided:

Our team completed a comprehensive facilities condition and educational adequacy assessment for Fort Bend ISD in suburban Houston, identifying \$484 million in facility needs over a 5-year planning horizon. We compiled data from assessment findings, capacity analysis, a five-year life-cycle forecast and a review of FBISD enrollment projections to inform a transparent planning process resulting in a successful bond election in 2014.

Value Added:

The credible data and extensive community engagement efforts garnered community support and voter approval of a \$435 million bond.

Unique Issues/Creative Initiatives:

Fort Bend ISD is a growing district with many new facilities. To cut overall costs for the assessment, we proposed performing life-cycle only assessments on buildings constructed in the last five years. This approach eliminated over one million square feet from comprehensive assessments and saved the District money on the project. This alternative approach allowed higher-level key information about the newer facilities to be gathered and input into the MAPPS software application for future planning.

Cost Proposal (Section 8)

Below please find the rate schedule for the personnel roles anticipated to be included in this project. Should more detailed ADA assessment services be required, we respectfully reserve the right to add a sub consultant to our team and negotiate their fees at that time.

The fees proposed for the scope of services will be established based on the exact scope of services Oakland USD chooses to execute under this contract.

Proposed Rate Schedule Table:

POSITION TITLE	RATE
Principal	\$193.00
Project Manager	\$177.00
Deputy PM	\$134.00
Quality Assurance	\$181.00
Sr. Planner	\$ 152.00
Planner	\$ 105.00
Sr. Architect	\$ 175.00
Architect	\$ 142.00
Sr. Engineer	\$181.00
Engineer	\$146.00
Cost Estimator	\$125.00
Technical Writer	\$110.00
Administrative	\$ 84.00

Proposed Reimbursable Expenses:

The following items will be reimbursable at cost:

- All travel costs
- Mileage (at Federal mileage rate)
- Printing
- Reproduction materials (e.g. binders, CDs, etc.)



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
11/07/2016

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER LIC #0437153 Marsh Risk & Insurance Services CIRTS_Support@internal.jacobs.com 777 S. Figueroa Street Los Angeles, CA 90017-5822	1-212-948-1306	CONTACT NAME: PHONE (A/C, No, Ext): FAX (A/C, No): 1-212-948-1306 E-MAIL ADDRESS: INSURER(S) AFFORDING COVERAGE INSURER A: ACE AMER INS CO INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:	NAIC # 22667
INSURED Jacobs Engineering Group Inc. 155 North Lake Avenue, 9th Floor Pasadena, CA 91101			

COVERAGES

CERTIFICATE NUMBER: 48425777

REVISION NUMBER:

THIS IS TO CERTIFY THAT 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. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> CONTRACTUAL LIABILITY GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		HDO G27853766	07/01/16	07/01/17	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 250,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 1,000,000 PRODUCTS - COMP/OP AGG \$ 1,000,000 \$
A	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS		ISA H09042398	07/01/16	07/01/17	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB EXCESS LIAB DED RETENTION \$	<input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE				EACH OCCURRENCE \$ AGGREGATE \$ \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) if yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N N/A	SCF C48605291 (WI) WLR C48605254 (AOS) WCU C4860528A (LA, OH, TX)	07/01/16 07/01/16 07/01/16	07/01/17 07/01/17 07/01/17	<input checked="" type="checkbox"/> PER STATUTE <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

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

PROJECT MGR: Paul Mills. CONTRACT MGR: Craig Washington. RE: OUSD Facility Assessment and Masterplan. CONTRACT END DATE: 11/30/2017. SECTOR: Public. *\$2,250,000 SIR FOR STATES OF: LA, OH, TX. *THIS IS A SAMPLE CERTIFICATE ONLY*. THE ACTUAL CERTIFICATE FOR THE PROPOSED PROJECT WILL COMPLY WITH THE TERMS AND CONDITIONS NEGOTIATED IN THE FINAL CONTRACT, CONSISTENT WITH POLICY TERMS AND CONDITIONS.

CERTIFICATE HOLDER

CANCELLATION

Oakland Unified School District 1000 Broadway Suite 680 Oakland, CA 94607 USA	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
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SUPPLEMENT TO CERTIFICATE OF INSURANCE

DATE

11/07/2016

NAME OF INSURED: Jacobs Engineering Group Inc.



DEPARTMENT OF FACILITIES PLANNING & MANAGEMENT ROUTING FORM

Project Information			
Project Name	Facilities Planning and Management	Site	918
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	Jacobs Engineering Group, Inc..	Agency's Contact	Casey Morris, Principal				
OUSD Vendor ID #	Jacobs	Title	Principal				
Street Address	300 Frank H. Ogawa Plaza	City	Oakland	State	CA	Zip	94612
Telephone	510-457-0027	Policy Expires	7-1-2017				
Contractor History	Previously been an OUSD contractor? <input type="checkbox"/> Yes <input type="checkbox"/> No		Worked as an OUSD employee? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
OUSD Project #	00918						

Term			
Date Work Will Begin	1-12-2017	Date Work Will End By (not more than 5 years from start date)	1-12-2018

Compensation			
Total Contract Amount	\$	Total Contract Not To Exceed	\$ 2,331,778.00
Pay Rate Per Hour (If Hourly)	\$	If Amendment, Changed Amount	\$
Other Expenses		Requisition Number	

Budget Information				
If you are planning to multi-fund a contract using LEP funds, please contact the State and Federal Office <u>before</u> completing requisition.				
Resource #	Funding Source	Org Key	Object Code	Amount
9450	Fund 21, Measure J	9189905911	5825	\$2,331,778.00

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.					
1.	Division Head	Phone	510-535-7038	Fax	510-535-7082
	Director, Facilities Planning and Management				
	Signature	Date Approved		12/19/16	
2.	General Counsel, Department of Facilities Planning and Management				
	Signature	Date Approved		12-19-16	
3.	Executive Director of Buildings, Custodial & Grounds				
	Signature	Date Approved			
4.	Senior Business Officer, Board of Education				
	Signature	Date Approved			
5.	President, Board of Education				
	Signature	Date Approved			