

Board Office Use: Legislative File Info.	
File ID Number	17-2009
Introduction Date	10-11-2017
Enactment Number	17-1439
Enactment Date	10-11-17



**OAKLAND UNIFIED  
SCHOOL DISTRICT**

Community Schools, Thriving Students

# Memo

**To** Board of Education

**From** Kyla Johnson-Trammell, Superintendent and Secretary, Board of Education  
By: Vernon Hal, Senior Business Officer *YEH*  
Joe Dominguez, Deputy Chief, Facilities Planning and Management *[Signature]*

**Board Meeting Date** October 11, 2017

**Subject** Amendment No. 3 Independent Consultant Agreement -HKIT Architects - Glenview Expansion- New Construction Phase II Project

**Action Requested** Approval by the Board of Education of Amendment No. 3, for an Independent Agreement between the District and HKIT Architects, Oakland, CA, for the latter to provide services for two(4) additional areas of unanticipated design and engineering services that related to community engagement, in conjunction with the Glenview Expansion - New Construction Phase II Project, in an amount of \$67,610.00, increasing the previous contract amount form \$2,809,900.00 to a not-to-exceed amount of \$2,877,510.00. All remaining portions of the agreement shall remain in full force and effect.

**Discussion** Consultant is being retained to develop and support the successful implementation of the community engagement plan for the Glenview Construction Project.

**LBP** (Local business participation percentage) 100.00%

**Recommendation** Approval by the Board of Education of Amendment No. 3, for an Independent Agreement between the District and HKIT Architects, Oakland, CA, for the latter to provide services for two(4) additional areas of unanticipated design and engineering services that related to community engagement, in conjunction with the Glenview Expansion - New Construction Phase II Project, in an amount of \$67,610.00, increasing the previous contract amount form \$2,809,900.00 to a not-to-exceed amount of \$2,877,510.00. All remaining portions of the agreement shall remain in full force and effect.

**Fiscal Impact** Fund 21, Measure J

**Attachments**

- Amendment No. 3, including scope of work
- Consultant Proposal



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

**Legislative File ID No.** 17-2009

**Department:** Facilities Planning and Management

**Vendor Name:** HKIT

**Project Name:** Glenview New Construction **Project No.:** 13134

**Contract Term:** Intended Start: 8/9/2017 Intended End: 1/25/2018

**Annual (if annual contract) or Total (if multi-year agreement) Cost:** \$67,610.00

**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?**

**Summarize the services this Vendor will be providing.**

- Retaining Wall Cap Re-Design
- Maintenance of North Retaining Wall Property Line Gap and Outreach
- Elevator Relocation and Existing System Redesign
- Project Rebidding

**Was this contract competitively bid?** ☐ Yes (No if Unchecked)

If No, please answer the following:

1) How did you determine the price is competitive?

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**



## AMENDMENT NO. 3 TO INDEPENDENT CONSULTANT CONTRACT

This Amendment is entered into between the Oakland Unified School District (OUSD) and HKIT. OUSD entered into an Agreement with CONTRACTOR for services on August 24, 2017, and the parties agree to amend that Agreement as follows:

<b>1. Services:</b>	<input type="checkbox"/> The scope of work is <u>unchanged</u> .	<input checked="" type="checkbox"/> The scope of work has <u>changed</u> .
<p><b>If scope of work changed:</b> Provide brief description of revised scope of work including description of expected final results, such as services, materials, products, and/or reports; attach additional pages as necessary. <u>Attach revised scope of work.</u></p> <p>The CONTRACTOR agrees to provide the following amended services: <u>The scope of the project is to provide design &amp; engineering services for two (2) additional areas, as well as to related community engagement.</u></p>		
<b>2. Terms (duration):</b>	<input checked="" type="checkbox"/> The term of the contract is <u>unchanged</u> .	<input type="checkbox"/> The term of the contract has <u>changed</u> .
<p><b>If term is changed:</b> The contract term is extended by an additional _____, and the amended expiration date is _____.</p>		
<b>3. Compensation:</b>	<input type="checkbox"/> The contract price is <u>unchanged</u> .	<input checked="" type="checkbox"/> The contract price has <u>changed</u> .
<p><b>If the compensation is changed:</b> The contract price is amended by</p> <p style="padding-left: 40px;"><input checked="" type="checkbox"/> Increase of \$67,610.00 to original contract amount</p> <p style="padding-left: 40px;"><input type="checkbox"/> Decrease of \$_____ to original contract amount</p> <p style="text-align: center;">and the new contract total is <b>Two million, eight hundred seventy-seven thousand, five hundred ten dollars and no cents (\$2,877,510.00).</b></p>		

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

**5. Amendment History:**

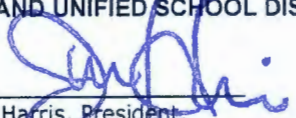
☒ There are no previous amendments to this Agreement. ☐ This contract has previously been amended as follows:

No.	Date	General Description of Reason for Amendment	Amount of Increase (Decrease)
1	8-12-2015	Request that the District adjust the provision of existing contract in two ways	\$ - 0 -
2	5-10-2017	Additional services for unanticipated design and engineering work	\$85,000.00
3	9-28 -2017	Additional services for unanticipated design & engineering work	\$67,610.00

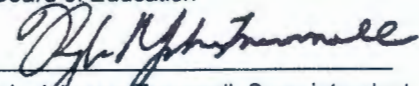
**6. Approval:** This Agreement is not effective and no payment shall be made to Contractor until it is approved. Approval requires signature by the Board of Education, and the Superintendent as their designee.



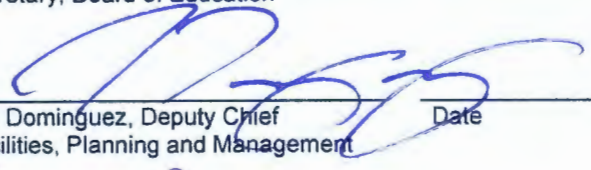
## OAKLAND UNIFIED SCHOOL DISTRICT

  
 James Harris, President,  
 Board of Education

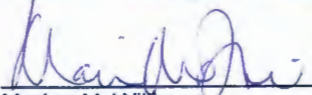
  
 Date

  
 Kyla Johnson Trammell, Superintendent  
 Secretary, Board of Education

  
 Date

  
 Joe Dominguez, Deputy Chief  
 Facilities, Planning and Management

Date

  
 Marion McWilliams,  
 General Counsel, Facilities, Planning and Management

  
 Date

## CONTRACTOR

  
 Contractor Signature

August 24, 2017

Date

Dara A. Youngdale, President

Print Name, Title

## EXHIBIT "A" Scope of Work

Contractor Name: HKIT

Billing Rate: Sixty-seven thousand, six hundred ten dollars and no cents (\$67,610.00)

## 1. Description of Services to be Provided

The scope of the project is to request that services are required for two (4) additional areas of unanticipated design and engineering services that related to community engagement.

## 2. Specific Outcomes:

Create equitable opportunities for learning; and provide accountability for quality.

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

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

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>

Cesar Monterrosa  
 Director of Facilities Planning & Management



538 NINTH STREET SUITE 240 OAKLAND, CALIFORNIA 94607 T 510 625 9800 WWW.HKIT.COM A CALIFORNIA CORPORATION

March 22, 2017  
Rev: April 10, 2017  
Rev: June 5, 2017

Mr. Cesar Monterrosa, Director of Facilities  
Mr. Wil Newby, Project Manager  
Oakland Unified School District  
955 High Street  
Oakland, California 94601

Reference: OUSD Glenview Elementary School – Architectural Design and  
Structural Engineering Proposed Additional Services No. 2;  
Design Services Related to the Retaining Wall Cap Redesign, North Property Line  
Gap, the Elevator/Stair Redesign and Rebidding Services  
HKIT #10202

Dear Mr. Monterrosa and Mr. Newby,

HKIT is requesting your approval of the following additional services related to unanticipated design and engineering services. These services are due to the contractor's request to provide an alternate retaining wall cap, the complexity of the site retaining walls and resultant property line gap and the need to find a manageable maintenance approach. Also, our team has been required to redesign the building elevator location and exiting system due to a different code interpretation at the DSA backcheck vs. the code parameters reviewed, established and affirmed by DSA in the pre-application process. Lastly, we are requesting additional services related to project rebidding. These services are outlined and summarized below.

#### **SCOPE AND PROPOSED COMPENSATION**

We proposed working on a Lump Sum Basis of Sixty-Seven Thousand, Six Hundred and Ten and 00/100 Dollars (\$67,610.00) as summarized below. This will be in addition to our current contract of Two Million, Eight Hundred and Nine Thousand, Nine Hundred and 00/100 Dollars (\$2,809,900.00).

##### **1. Retaining Wall Cap Re-Design**

At the request of Alten Construction, HKIT and our structural engineer are providing additional design and construction detailing for the installation of a shotcrete wall cap in lieu of the designed and DSA approved cast-in place cap. Our services include constructability discussions and negotiation with the contractor over several months, review with our structural engineer and DSA, team coordination, redesign, detailing and the DSA approvals process. Our understanding is that the contractor has agreed to reimburse the District for this work, and the District will back charge the contractor for our professional services.

We are requesting the following services to cover our added costs for this work;

• Architectural Services (40 hours x \$160/avg.)	\$ 6,400.00
• Structural Services (\$2,581.00 x 1.1)	<u>\$ 2,840.00</u>
<b>Sub-Total</b>	<b>\$ 9,240.00</b>

#### **PRINCIPALS**

THOMAS C. BRUTTING FAIA  
RICHARD CALDWELL AIA  
JEFF EVANS AIA  
JOHN FRANDO AIA  
CHRISTOPHE LAVERNE AIA  
PAUL M.B. MCELWEE AIA  
DARA A. YOUNGDALE AIA

#### **DIRECTOR OF DESIGN**

ROD HENMI, FAIA, NOMA

#### **SENIOR ASSOCIATES**

TAD SEKINO  
ERWIN WON  
CHUCK WONG AIA

#### **ASSOCIATES**

FELIX HUNZIKER  
SONJA MARCK  
JASON A.D. SHIRRIFF AIA  
LISA WANG AIA

Mr. Cesar Monterrosa, Director of Facilities  
Oakland Unified School District

June 5, 2017  
Page No. 2

## **2. Maintenance of North Retaining Wall Property Line Gap and Communications and Neighborhood Outreach**

HKIT and our structural engineer will provide additional design and construction detailing (post DSA design and approval) related to the north retaining wall property line gap including the addition of a concrete swale in the gap between the retaining wall and existing neighboring fences, drainage details to allow for site drainage onto District property and the inclusion of periodic access panels into the gap area to allow for maintenance. The additional access panels will require structural engineering to accommodate new posts and DSA approval. Our scope of services includes additional District meetings and neighborhood outreach. At the District's request, we have attended additional internal meetings and have allowed for a maximum of two neighborhood meetings.

We are requesting the following services to cover our added costs for the maintenance

• Architectural Services (55 hours x \$160/avg.)	\$ 8,800.00
• Structural Services (\$2,400.00 x 1.1)	<u>\$ 2,640.00</u>
<b>Sub-Total</b>	<b>\$ 11,440.00</b>

## **3. Elevator Relocation and Exiting System Redesign**

During the backcheck process, DSA reinterpreted the classroom building as a three-story building rather than a two-story building with a walk out basement as previously reviewed and agreed to during the DSA pre-application process. This determination which redefined the "main floor as a second floor" required that we move the elevator, add an exit hallway to the courtyard and enclose the stairs. This created a substantial amount of redesign work for the entire team, most significantly our architectural team and structural engineer. While code is always subject to interpretation and we must adhere to the final ruling by DSA, this late breaking change is one that we could not anticipate.

We have expended and exceed our 10% fee contingency by absorbing the following services; water proofing, elevator and acoustic engineering that were not a part of our base scope, the splitting of the project into three increments, unanticipated neighbor meeting and input, project construction delays, and most recently, DSA code reinterpretations, not in alignment with our DSA pre-application meeting. Recognizing that this is solely at the District's discretion, we are requesting compensation for our services as follows:

• Architectural Services (80 hours x \$150/avg.)	\$ 12,000.00
• Structural Services (\$14,300.00 x 1.1)	<u>\$ 15,730.00</u>
<b>Sub-Total</b>	<b>\$ 27,730.00</b>



Mr. Cesar Monterrosa, Director of Facilities  
Oakland Unified School District

June 5, 2017  
Page No. 3

**4. Project Rebidding**

Due to numerous factors, the Increment Three Project is being rebid. We estimate that this process, which is scheduled to take place in July, will take us an additional 120 hours to provide services including; attending pre-bid contractor events and GMP meetings, to provide clarifications, respond to Bid RFI's, meet with the District and contractor.

- Architectural Services (120 hours x \$160/avg.)    \$ 19,200.00  
    **Sub-Total**    **\$ 19,200.00**

---

**GRAND TOTAL**    **\$ 67,610.00**

Should you have any questions or comments please do not hesitate to call. We look forward to our continued work on the project:

Very truly yours,

HKIT ARCHITECTS

A handwritten signature in black ink, appearing to read "Dara Youngdale".

Dara A. Youngdale, AIA  
Principal

A handwritten signature in black ink, appearing to read "Thomas C. Brutting".

Thomas C. Brutting, FAIA  
Principal

DAY/lp



Client#: 177

HKITARCHI

ACORD™

## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

8/14/2017

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 <b>Dealey, Renton &amp; Associates</b> P. O. Box 12675 Oakland, CA 94604-2675 510 465-3090	CONTACT NAME: <b>Nancy Ferrick</b>	
	PHONE (A/C, No, Ext): <b>510 465-3090</b>	FAX (A/C, No): <b>510 452-2193</b>
INSURED <b>HKIT Architects</b> 538 Ninth Street, Suite 240 Oakland, CA 94607	E-MAIL ADDRESS: <b>nferrick@dealeyrenton.com</b>	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A: <b>Sentinel Insurance Co. LTD</b>	NAIC # <b>11000</b>
	INSURER B: <b>Travelers Casualty &amp; Surety Co.</b>	<b>31194</b>
	INSURER C:	
	INSURER D:	
	INSURER E:	
	INSURER F:	

## COVERAGES

## CERTIFICATE NUMBER:

## 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 INSR 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  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:	X X	57SBWL1922	08/28/2017	08/28/2018	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000 \$
A	AUTOMOBILE LIABILITY  ANY AUTO ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> HIRED AUTOS	X X	57SBWL1922	08/28/2017	08/28/2018	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$	X X	57SBWL1922	08/28/2017	08/28/2018	EACH OCCURRENCE \$5,000,000 AGGREGATE \$5,000,000 \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	X	57WEGPH5215	09/01/2017	09/01/2018	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
B	Professional Liability		106580559	08/28/2017	08/28/2018	\$2,000,000 per Claim \$4,000,000 Annl Aggr.

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

30 Days Notice of Cancellation.

Ref: All work performed by or on behalf of the named insured. BUSINESS LIABILITY, NON-OWNED and HIRED AUTOMOBILE LIABILITY ADDITIONAL INSURED: The Certificate Holder\* and any other person named in the written contract between the Named Insured and the Certificate Holder. The coverage afforded is pursuant to Section C., Who is An Insured, Sub Section 6., Additional Insureds When Required By Written Contract, Written (See Attached Descriptions)

## CERTIFICATE HOLDER

## CANCELLATION

<b>Oakland Unified School District</b> <b>Dept. of Facilities Planning</b> <b>955 High Street</b> <b>Oakland, CA 94601</b>	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 <i>Elise Fisher</i>

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## DESCRIPTIONS (Continued from Page 1)

Agreement Or Permit, Subsection f. Any Other Party of the Business Liability Coverage Form, Form No. SS 00

08. \*ADDITIONAL INSURED PER POLICY FORM WORDING: Oakland Unified School District, its Directors, Officers, Employees, Agents, and Representatives Primary Insurance and severability of Interests apply per policy form. A Waiver of Subrogation applies to Workers' Compensation.

Insured: HKT Architects  
Insurer: Sentinel Insurance Co. LTD  
Policy Date: 08/28/2017  
Policy Number: 5788WL1922

Additional Insured: San Francisco Housing Authority, its Officers, Members of Commissions, Agents, Employees, & Members of the HUD Recovery Team.

EXCERPTS FROM: Hartford Form SS 00 08 04 05

## BUSINESS LIABILITY COVERAGE FORM

### C. WHO IS AN INSURED

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

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

#### f. Any Other Party

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

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

(ii) This Coverage Part provides coverage for "bodily injury" or "property damage" included within the "products- completed operations hazard.

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

### E.5. Separation of Insureds

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

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

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

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

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

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

EXCERPT FROM Hartford Form SS 04 38 09 09

## HIRED AUTO AND NON-OWNED AUTO

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

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



**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

## **WORKERS' COMPENSATION BROAD FORM ENDORSEMENT EXTENDED OPTIONS**

**Policy Number:** 57WEGPH5215

**Effective Date:** 9/1/17

Effective hour is the same as stated on the Information Page of the policy.

**Named Insured and Address:**

HKIT Architects  
538 Ninth Street, Suite 240  
Oakland, CA 94607

Section I of this endorsement expands coverage provided under WC 00 00 00.

Section II of this endorsement provides additional coverage usually only provided by endorsement.

Section III of this endorsement is a Schedule of Covered States.

You may use the index to locate these coverage features quickly:

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A. Stop Gap Coverage Limited to Montana, North Dakota, Ohio, Washington, West Virginia and Wyoming			

## SECTION I

### PARTS ONE and TWO

#### 1. WE WILL ALSO PAY

D. We Will Also Pay of Part One (WORKERS' COMPENSATION INSURANCE); and

E. We Will Also Pay of Part Two (EMPLOYERS' LIABILITY INSURANCE) is replaced by the following:

##### We Will Also Pay

We will also pay these costs, in addition to other amounts payable under this insurance, as part of any claim, proceeding, or suit we defend:

1. reasonable expenses incurred at our request, **INCLUDING** loss of earnings;
2. premiums for bonds to release attachments and for appeal bonds in bond amounts up to the limit of our liability under this insurance;
3. litigation costs taxed against you;
4. interest on a judgment as required by law until we offer the amount due under this law; and
5. expenses we incur.

### PART THREE

#### 2. How This Insurance Applies

Paragraph 4. of A. How This Insurance Applies of Part 3 (Other States Insurance) is replaced by the following:

4. If you have work on the effective date of this policy in any state not listed in Item 3.A. of the Information Page, coverage will not be afforded for that state unless we are notified within sixty days.

### PART SIX

#### 3. Transfer Of Your Rights and Duties

C. Transfer Of Your Rights and Duties of Part 6 (Conditions) is replaced by the following:

Your rights or duties under this policy may not be transferred without our written consent.

If you die and we receive notice within sixty days after your death, we will cover your legal representative as insured.

#### 4. Liberalization

If we adopt a change in this form that would broaden the coverage of this form without extra charge, the broader coverage will apply to this policy. It will apply when the change becomes effective in your state.

## SECTION II

### VOLUNTARY COMPENSATION AND EMPLOYERS' LIABILITY COVERAGE

#### 5. Voluntary Compensation Insurance

##### A. How This Insurance Applies

This insurance applies to bodily injury by accident or bodily injury by disease. Bodily injury includes resulting death.

1. The bodily injury must be sustained by any officer or employee not subject to the workers' compensation law of any state shown in Item 3.A. of the Information Page.
2. The bodily injury must arise out of and in the course of employment or incidental to work in a state shown in Item 3.A. of the Information Page.

3. The bodily injury must occur in the United States of America, its territories or possessions, or Canada, and may occur elsewhere if the employee is a United States or Canadian citizen, or otherwise legal resident, and legally employed, in the United States or Canada and temporarily away from those places.

4. Bodily injury by accident must occur during the policy period.
5. Bodily injury by disease must be caused or aggravated by the conditions of the

officer's or employee's employment. The officer's or employee's last day of last exposure to the conditions causing or aggravating such bodily injury by disease must occur during the policy period.

**B. We Will Pay**

We will pay an amount equal to the benefits that would be required of you as if you and your employees were subject to the workers' compensation law of any state shown in Item 3.A. of the Information Page. We will pay those amounts to the persons who would be entitled to them under the law.

**C. Exclusion**

This insurance does not cover:

1. any obligation imposed by workers' compensation or occupational disease law or any similar law.
2. bodily injury intentionally caused or aggravated by you.
3. officers or employees who have elected not to be subject to the state workers' compensation law.
4. partners or sole proprietors not covered under the Standard Sole Proprietors, Partners, Officers and Others Coverage Endorsement.

**D. Before We Pay**

Before we pay benefits to the persons entitled to them, they must:

1. Release you and us, in writing, of all responsibility for the injury or death.
2. Transfer to us their right to recover from others who may be responsible for the injury or death.
3. Cooperate with us and do everything necessary to enable us to enforce the right to recover from others.

If the persons entitled to the benefits of this insurance fail to do those things, our duty to pay ends at once. If they claim damages from you or from us for the injury or death, our duty to pay ends at once.

**E. Recovery From Others**

If we make a recovery from others, we will keep an amount equal to our expenses of recovery and the benefits we paid. We will pay the balance to the persons entitled to it.

If the persons entitled to the benefits of this insurance make a recovery from others, they must reimburse us for the benefits we paid them.

**F. Employers' Liability Insurance**

Part Two (Employers' Liability Insurance) applies to bodily injury covered by this endorsement as though the State of Employment was shown in Item 3.A. of the Information Page.

This provision 5. does not apply in New Jersey or Wisconsin.

**EMPLOYERS' LIABILITY STOP GAP COVERAGE**

**6. Employers' Liability Stop Gap Coverage**

- A. This coverage only applies in Montana, North Dakota, Ohio, Washington, West Virginia and Wyoming.
- B. Part One (Workers' Compensation Insurance) does not apply to work in states shown in Paragraph A above.
- C. Part Two (Employers' Liability Insurance) applies in the states, shown in Paragraph A., as though they were shown in Item 3.A. of the Information Page.
- D. Part Two, Section C. Exclusions is changed by adding these exclusions.

This insurance does not cover;

5. bodily injury intentionally caused or aggravated by you or in Ohio bodily injury resulting from an act which is determined by an Ohio court of law to have been committed by you with the belief that an injury is substantially certain to occur. However, the cost of defending such claims or suits in Ohio is covered.

13. bodily injury sustained by any member of the flying crew of any aircraft.

14. any claim for bodily injury with respect to which you are deprived of any defense or defenses or are otherwise subject to penalty because of default in premium under the provisions of the workers' compensation law or laws of a state shown in Paragraph A.

- E. This insurance applies to damages for which you are liable under West Virginia Code Annot. S 23-4-2.



## EXTENDED OPTIONS

### 1. Employers' Liability Insurance

Item 3.B. of the Information Page is replaced by the following:

#### B. Employers' Liability Insurance:

1. Part Two of the policy applies to work in each state listed in Item 3.A.

The Limits of Liability under Part Two are the higher of:

Bodily Injury by Accident	<u>\$500,000</u>	<u>Each Accident</u>
Bodily Injury by Disease	<u>\$500,000</u>	<u>Policy Limit</u>
Bodily Injury by Disease	<u>\$500,000</u>	<u>Each Employee</u>

OR

2. The amount shown in the Information Page.

This provision 1 of EXTENDED OPTIONS does not apply in New York because the Limits Of Our Liability are unlimited.

In this provision the limits are changed from \$500,000 to \$1,000,000 in California.

### 2. Unintentional Failure to Disclose Hazards

If you unintentionally should fail to disclose all existing hazards at the inception date of your policy, we shall not deny coverage under this policy because of such failure.

### 3. Waiver of Our Right To Recover From Others

- A. We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against any person or organization for whom you perform work under a written contract that requires you to obtain this agreement from us.

This agreement shall not operate directly or indirectly to benefit anyone not named in the agreement.

- B. This provision 3. does not apply in the states of Pennsylvania and Utah.

### 4. Foreign Voluntary Compensation and Employers' Liability Reimbursement

#### A. How This Reimbursement Applies

This reimbursement provision applies to bodily injury by accident or bodily injury by disease. Bodily injury includes resulting death.

1. The bodily injury must be sustained by an officer or employee.
2. The bodily injury must occur in the course of employment necessary or incidental to work in a country not listed in Exclusion C.1. of this provision.
3. Bodily injury by accident must occur during the policy period.
4. Bodily injury by disease must be caused or aggravated by the conditions of your employment. The officer or employee's last exposure to those conditions of your employment must occur during the policy period.

### B. We Will Reimburse

We will reimburse you for all amounts paid by you whether such amounts are:

1. voluntary payments for the benefits that would be required of you if you and your officers or employees were subject to any workers' compensation law of the state of hire of the individual employee.
2. sums to which Part Two (Employers' Liability Insurance) would apply if the Country of Employment were shown in Item 3.A. of the Information Page.

### C. Exclusions

This insurance does not cover:

1. any occurrences in the United States, Canada, and any country or jurisdiction which is the subject of trade or economic sanctions imposed by the laws or regulations of the United States of America in effect as of the inception date of this policy.
2. any obligation imposed by a workers' compensation or occupational disease law, or similar law.
3. bodily injury intentionally caused or aggravated by you.

4. liability for any consequence, whether direct or indirect, of war, invasion, act of Foreign enemy, hostilities (whether war be declared or not), civil war, rebellion, revolution, insurrection or military or usurped power. No endorsement now or subsequently attached to this policy shall be construed as overriding or waiving this limitation unless specific reference is made thereto.

#### **D. Before We Pay**

Before we reimburse you for the benefits to the persons entitled to them, you must have them:

1. release you and us, in writing, of all responsibility for the injury or death,
2. transfer to us their right to recover from others who may be responsible for their injury or death,
3. cooperate with us and do everything necessary to enable us to enforce the right to recover from others.

If the persons entitled to the benefits paid fail to do these things, our duty to reimburse ends at once. If they claim damages from us for the injury or death, our duty to reimburse ends at once.

#### **E. Recovery From Others**

If we make a recovery from others, we will keep an amount equal to our expenses of recovery and the benefits we reimbursed. We will pay the balance to the persons entitled to it. If persons entitled to the benefits make a recovery from others, they must repay us for the amounts that we have reimbursed you.

#### **F. Reimbursement for Actual Loss Sustained**

This endorsement provides only for reimbursement for the loss you actually sustain. In order for you to recover loss or expenses under this reimbursement you must:

1. actually sustain and pay the loss or expense in money after trial, or
2. secure our consent for the payment of the loss or expense.

#### **G. Repatriation**

Our reimbursement includes the additional expenses of repatriation to the United States

of America necessarily incurred as a direct result of bodily injury.

Our reimbursement shall be limited as follows:

1. to the amount by which such expenses exceed the normal cost of returning the officer or employee if in good health, or
2. in the event of death, to the amount by which such expenses exceed the normal cost of returning the officer or employee if alive and in good health.

In no event shall our reimbursement exceed the bodily injury by accident limit shown in Item 3.B. of the Information Page as respects any one such officer or employee whether dead or alive.

#### **H. Endemic Disease**

The word "disease" includes any endemic diseases.

The coverage applies as if endemic diseases were included in the provisions of the workers' compensation law.

#### **5. Longshore and Harbor Workers' Compensation Act Coverage**

**General Section C. Workers' Compensation Law** is replaced by the following:

##### **C. Workers' Compensation Law**

Workers' Compensation Law means the workers or workers' compensation law and occupational disease law of each state or territory named in Item 3.A. of the Information Page and the Longshore and Harbor Workers' Compensation Act (33 USC Sections 901-950). It includes any amendments to those laws that are in effect during the policy period. It does not include any other federal workers or workers' compensation law, other federal occupational disease law or the provisions of any law that provide nonoccupational disability benefits.

Part Two (Employers' Liability Insurance), C. Exclusions, exclusion 8, does not apply to work subject to the Longshore and Harbor Workers' Compensation Act.

This coverage does not apply to work subject to the Defense Base Act, the Outer Continental Shelf Lands Act, or the Nonappropriated Fund Instrumentalities Act.

### **SECTION III**

#### **1. SCHEDULE OF COVERED STATES**

A. This endorsement only applies in the states listed in this Schedule of Covered States.

B. If a state, shown in Item 3.A. of the Information Page, approves this endorsement after the effective date of this policy, this endorsement will apply to this policy. The coverage will apply in the new state on the effective date of the state approval.

C. Schedule of Covered States:

Countersigned by \_\_\_\_\_

Authorized Representative



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

8/23/2017

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 have ADDITIONAL INSURED provisions or 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	<b>Peter Kohn Insurance Agency</b> 3000 Citrus Circle, Suite 116 Walnut Creek, CA 94598	CONTACT NAME:	Peter B. Kohn	
		PHONE (A/C, No, Ext):	( 92) 820-1600	FAX (A/C, No):
		E-MAIL ADDRESS:	pkohninsurance@gmail.com	
		INSURER(S) AFFORDING COVERAGE		NAIC #
		INSURER A: Truck Insurance Exchange		21709
		INSURER B:		
		INSURER C:		
		INSURER D:		
		INSURER E:		
		INSURER F:		

INSURED **LCA Architects Inc.**

590 Ygnacio Valley Road, Suite 310  
Walnut Creek, CA 94596

## COVERAGES

## CERTIFICATE NUMBER:

## 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.

NSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
A	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	X	X	606667707	5/30/2017	5/30/2018	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <b>EXCESS LIAB</b> <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

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

2015 Honda Accord Tou; VIN: 1HGCR3F99FA008662

2009 Lexus LS460; VIN: JTHBL46F095088484

2015 Mercedes Benz S 550; VIN: WDDUG8CB6FA141950

## CERTIFICATE HOLDER

## CANCELLATION

Oakland Unified School District  
Attn: Susie Butler-Berkley  
Division of Facilities Planning & Management  
955 High Street  
Oakland, CA 94601  
Re: Havenscourt CCPA Science Lab. Project

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

Peter Kohn

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**OAKLAND UNIFIED  
SCHOOL DISTRICT**

Community Schools, Thriving Students

Ln 2, Pg 8

## DIVISION OF FACILITIES PLANNING & MANAGEMENT ROUTING FORM

### Project Information

Project Name	Glenview New Construction Project	Site	119
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### 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
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### Contractor Information

Contractor Name	HKIT Architects	Agency's Contact		Dara Youngdale				
OUSD Vendor ID #	V022233	Title		Project Manager				
Street Address	538 Ninth Street Suite 240	City	Oakland	State	CA	Zip	94607	
Telephone	510-625-9800	Policy Expires	8-1-2018					
Contractor History	Previously been an OUSD contractor? X Yes <input type="checkbox"/> No		Worked as an OUSD employee? <input type="checkbox"/> Yes X No					
OUSD Project #	13134							

### Term

Date Work Will Begin	5-25-2017	Date Work Will End By (not more than 5 years from start date)	2-26-2019
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### Compensation

Total Contract Amount	\$	Total Contract Not To Exceed	\$2,877,510.00
Pay Rate Per Hour (If Hourly)	\$	If Amendment, Changed Amount	\$ 67,610.00
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 before completing requisition.

Resource #	Funding Source	Org Key	Object Code	Amount
9350	Fund 21, Measure J	1199905820	6215	\$67,610.00

### Approval and Routing (in order of approval steps)

Services cannot be provided before the contract is fully approved and a Purchase Order is issued. Signing this document affirms that to your knowledge services were not provided before a PO was issued.

	Division Head	Phone	510-535-7038	Fax	510-535-7082
1.	Director, Facilities Planning and Management				
	Signature		Date Approved	8/25/17	
2.	General Counsel, Department of Facilities Planning and Management				
	Signature		Date Approved	9/5/17	
3.	Deputy Chief, Facilities Planning and Management				
	Signature		Date Approved		
4.	Senior Business Officer, Board of Education				
	Signature		Date Approved		
5.	President, Board of Education				
	Signature		Date Approved		





Board Office Use: Legislative File Info.	
File ID Number	17-0825
Introduction Date	5-10-2017
Enactment Number	17-0625
Enactment Date	5/10/17



OAKLAND UNIFIED  
SCHOOL DISTRICT

Community Schools, Thriving Students

# Memo

**To** Board of Education

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

**Board Meeting Date** May 10, 2017

**Subject** Amendment No. 2, Independent Consultant Agreement - HKIT Architects-  
Glenview Elementary School - New Construction Project

**Action Requested** Approval by the Board of Education of Amendment No. 2, Independent Consultant Agreement between the District and HKIT Architects, Oakland, CA, for the latter to provide additional design work to site retaining walls, fencing design and increment packaging, also, redesign of portico retention, in conjunction with Glenview Elementary School - New Construction Project, in an amount of \$85,000.00, increasing previous contract amount from \$2,724,900.00 to a not to exceed amount of \$2,809,900.00. All remaining portions of the agreement shall remain in full force and effect.

**Discussion** Additional services are required for unanticipated design and engineering work.

**LBP** (Local business participation percentage) 100.00%

**Recommendation** Approval by the Board of Education of Amendment No. 2, Independent Consultant Agreement between the District and HKIT Architects, Oakland, CA, for the latter to provide additional design work to site retaining walls, fencing design and increment packaging, also, redesign of portico retention, in conjunction with Glenview Elementary School - New Construction Project, in an amount of \$85,000.00, increasing previous contract amount from \$2,724,900.00 to a not to exceed amount of \$2,809,900.00. All remaining portions of the agreement shall remain in full force and effect.

**Fiscal Impact** Fund 21, Measure J

**Attachments**

- Amendment No. 2, 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. \_\_\_\_\_

Department: Facilities Planning and Management

Vendor Name: HKIT

Project Name: Glenview New Construction

Project No.: 13134

Contract Term: Intended Start: 1/25/2017

Intended End: 12/29/2017

Annual (if annual contract) or Total (if multi-year agreement) Cost: \$85,000.00

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?

Summarize the services this Vendor will be providing.

- Site Retaining Walls, Fencing Design and Increment Packaging
- Portico Retention and Redesign

Was this contract competitively bid? ☐ Yes (No if Unchecked)

If No, please answer the following:

1) How did you determine the price is competitive?

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**



## AMENDMENT NO. 2 TO INDEPENDENT CONSULTANT CONTRACT

This Amendment is entered into between the Oakland Unified School District (OUSD) and HKIT. OUSD entered into an Agreement with CONTRACTOR for services on April 5, 2017, and the parties agree to amend that Agreement as follows:

1. <b>Services:</b>	<input type="checkbox"/> The scope of work is <u>unchanged</u> .	<input checked="" type="checkbox"/> The scope of work has <u>changed</u> .
If scope of work changed: Provide brief description of revised scope of work including description of expected final results, such as services, materials, products, and/or reports; attach additional pages as necessary. <u>Attach revised scope of work.</u>		
The CONTRACTOR agrees to provide the following amended services: <u>The scope of the project is to request that the District adjust the provision of the existing contract in two ways. 1) Site Retaining Walls, Fencing Design and Increment Packaging. 2) Portico Retention and Redesign</u>		
2. <b>Terms (duration):</b>	<input type="checkbox"/> The term of the contract is <u>unchanged</u> .	<input type="checkbox"/> The term of the contract has <u>changed</u> .
If term is changed: The contract term is extended by an additional _____, and the amended expiration date is _____.		
3. <b>Compensation:</b>	<input type="checkbox"/> The contract price is <u>unchanged</u> .	<input checked="" type="checkbox"/> The contract price has <u>changed</u> .
If the compensation is changed: The contract price is amended by		
<input checked="" type="checkbox"/> Increase of \$85,000.00 to original contract amount		
<input type="checkbox"/> Decrease of \$ _____ to original contract amount		
and the new contract total is <b>Two million, eight hundred nine thousand, nine hundred dollars and no cents (\$2,809,900.00)</b>		

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

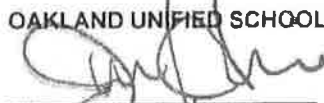
5. **Amendment History:**

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

No.	Date	General Description of Reason for Amendment	Amount of Increase (Decrease)
1	8-27-2014	Request that the District adjust the provision of existing contract in two ways	\$ - 0 -

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

**OAKLAND UNIFIED SCHOOL DISTRICT**


  
James Harris, President,  
Board of Education

Date 5/11/17

  
Devin Dillon, Superintendent  
Secretary, Board of Education

Date 5/11/17

**CONTRACTOR**

  
Contractor Signature

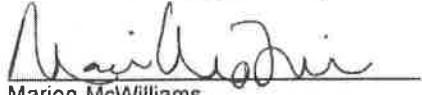
Date 4/5/17

Date

Dara A. Youngdale, President  
Print Name, Title

  
 Joe Dominguez, Deputy Chief  
 Facilities, Planning and Management

Date

  
 Marion McWilliams,  
 General Counsel, Facilities, Planning and Management

Date

**EXHIBIT "A" Scope of Work****Contractor Name: HKIT****Billing Rate: Eighty-five thousand dollars and no cents (\$85,000.00)****1. Description of Services to be Provided**

The scope of the project is to request that the District adjust the provision of the existing contract in two ways. 1) Site Retaining Walls, Fencing Design and Increment Packaging  
 2) Portico Retention and Redesign


**2. Specific Outcomes:**

Create equitable opportunities for learning; and provide accountability for quality.

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

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

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



Mr. Tadashi Nakadegawa, Director of Facilities  
Oakland Unified School District

December 16, 2016  
Page No. 2.

and typology were customized per neighbor input. Due to project timing, we packaged the retaining walls and fencing into its own increment which added scope to our original services in terms of CD packaging, DSA submittal and approvals processes. The additional services requested include CA.

We are requesting the following services to cover our added costs for the retaining wall and site fencing design and packaging:

- |   |                     |
|---|---------------------|
| • Architectural Services (120 hours x \$150/avg.) | \$ 18,000.00        |
| • Structural Services (\$30,000.00 x 1.1)         | <u>\$ 33,000.00</u> |
| <b>Sub-Total</b>                                  | <b>\$ 51,000.00</b> |

**Portico Retention and Redesign**

HKIT and our structural engineer agreed to absorb the initial design services related to the retention of the existing portico within the parameters of our original contract. However, due to a code error on the part of the Geo-Tech Engineer, the complex structural engineering analysis for this non-conforming building element is having to be done a second time. The error was discovered by CGS after we had completed our first round of engineering. It is now necessary for our engineer to re-analyze and re-calculate the portico for the new ground motions parameters and update their design. This work is requiring additional CD documentation and coordination on the part of HKIT and additional review and coordination time with DSA.

We are requesting the following services to cover our added costs for the portico analysis, re-calculation and coordination

- |  |                     |
|--|---------------------|
| • Architectural Services (60 hours x \$150/avg.) | \$ 9,000.00         |
| • Structural Services (\$22,800.00 x 1.1)        | <u>\$ 25,080.00</u> |
| <b>Sub-Total</b>                                 | <b>\$ 34,080.00</b> |

---

<b>TOTAL</b>	<b>\$ 85,080.00</b>
--------------	---------------------

Should you have any questions or comments please do not hesitate to call. We look forward to our continued work on the project.

Very truly yours,

HKIT ARCHITECT'S



Dara A. Youngdale, AIA  
Principal



Thomas C. Brutting, FAIA  
Principal

DAY/nmh

ACORD

## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

8/25/2016

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).

<b>PRODUCER</b> <b>Dealey, Renton &amp; Associates</b> <b>P. O. Box 12675</b> <b>Oakland, CA 94604-2675</b> <b>510 465-3090</b>		<b>CONTACT NAME:</b> Nancy Ferrick <b>PHONE (A/C, No, Ext):</b> 510 465-3090 <b>FAX (A/C, No):</b> 510 452-2193 <b>E-MAIL ADDRESS:</b> nferrick@dealeyrenton.com															
<b>INSURED</b> <b>HKIT Architects</b> <b>538 Ninth Street, Suite 240</b> <b>Oakland, CA 94607</b>		<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A: Sentinel Insurance Co. LTD</td> <td>11000</td> </tr> <tr> <td>INSURER B: Travelers Casualty &amp; Surety Co.</td> <td>31194</td> </tr> <tr> <td>INSURER C:</td> <td></td> </tr> <tr> <td>INSURER D:</td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </tbody> </table>		INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Sentinel Insurance Co. LTD	11000	INSURER B: Travelers Casualty & Surety Co.	31194	INSURER C:		INSURER D:		INSURER E:		INSURER F:	
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INSURER E:																	
INSURER F:																	

## COVERAGES

## CERTIFICATE NUMBER:

## 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 INSR 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 GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:	X	57SBWL1922	08/28/2016	08/28/2017	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COM/PROP AGG \$2,000,000 \$
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	X	57SBWL1922	08/28/2016	08/28/2017	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$		57SBWL1922	08/28/2016	08/28/2017	EACH OCCURRENCE \$5,000,000 AGGREGATE \$5,000,000 \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input checked="" type="checkbox"/> Y/N <input checked="" type="checkbox"/> N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	X	57WEGPH5215	09/01/2016	09/01/2017	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.I. EACH ACCIDENT \$1,000,000 E.I. DISEASE - EA EMPLOYEE \$1,000,000 E.I. DISEASE - POLICY LIMIT \$1,000,000
B	Professional Liability		106580559	08/28/2016	08/28/2017	\$2,000,000 per Claim \$4,000,000 Annl Aggr.

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

General Liability Policy excludes claims arising out of the performance of professional services.  
 PROJECT: Glenview Renovation. Oakland Unified School District and its directors, officers, employees, agents and representatives are named as Additional Insureds to General Liability per policy form wording.

## CERTIFICATE HOLDER

## CANCELLATION

<b>Oakland Unified School District</b> <b>955 High Street</b> <b>Oakland, CA 94601</b>	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 <i>Elise Fisher</i>
--	--

Insured: H&K Architects  
Insurer: Sentinel Insurance Co. LTD  
Policy Number: 5758WLV1822  
Policy Effective Date: 08/28/2018

PROJECT: Glenview Renovation Oakland Unified School District and its directors, officers, employees, agents and representatives

Additional Insured:

EXCERPTS FROM: Hartford Form SS 00 08 04 05

## BUSINESS LIABILITY COVERAGE FORM

### C. WHO IS AN INSURED

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

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

#### f. Any Other Party

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

(a) In the performance of your ongoing operations;

(b) In connection with your premises owned by or rented to you; or

(c) In connection with "your work" and included within the "products- completed operations hazard, but only if

(i) The written contract or written agreement requires you to provide such coverage to such additional insured; and

(ii) This Coverage Part provides coverage for "bodily injury" or "property damage" included within the "products-completed operations hazard.

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

### E.5. Separation of Insureds

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

a. As if each Named Insured were the only Named Insured; and

b. Separately to each Insured against whom a claim is made or "suit" is brought.

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

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

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

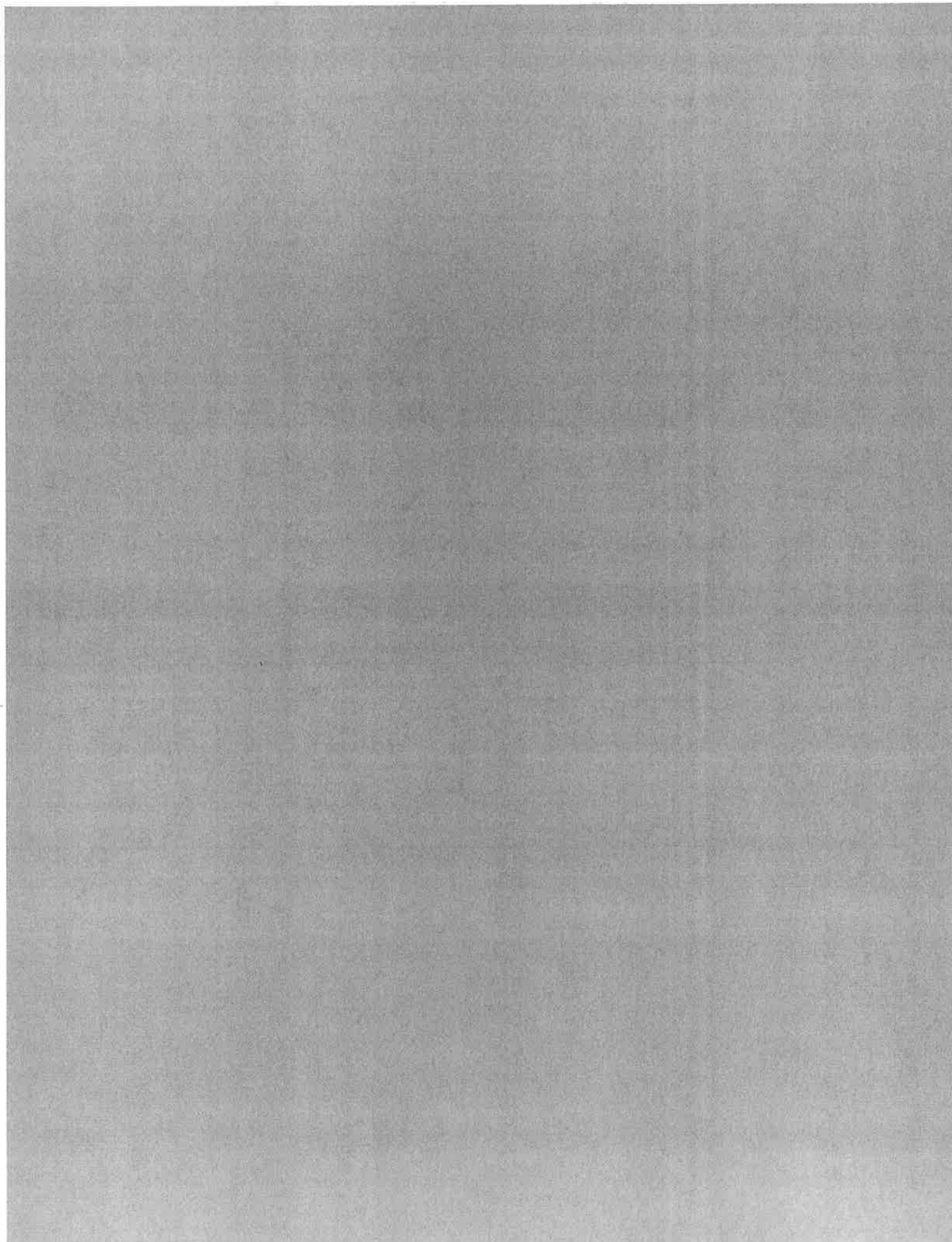
If the insured has waived any rights of recovery against any person or organization for all or part of any payment, including Supplementary Payments, we have made under this Coverage Part, we also waive that right, provided the insured waived their rights of recovery against such person or organization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

EXCERPT FROM Hartford Form SS 04 38 06 01

### HIRED AUTO AND NON-OWNED AUTO

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

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



Board Office Use: Legislative File Info.	
File ID Number	15-1465
Introduction Date	8-12-2015
Enactment Number	15-1218
Enactment Date	8/12/13 02



OAKLAND UNIFIED  
SCHOOL DISTRICT  
Community Schools, Thriving Students

# Memo

**To** Board of Education

**From** Antwan Wilson, Superintendent and Secretary, Board of Education  
By: Mia Settles-Tidwell, Chief Operations Officer  
Lance Jackson, Interim Deputy Chief, Facilities Planning and Management

**Board Meeting Date** August 12, 2015

**Subject** Amendment No. 1, Agreement for Architectural Services - HKIT - Glenview New Construction Project

**Action Requested** Approval by the Board of Education of an Amendment No. 1, Agreement for Architectural Services with HKIT for Architectural Services on behalf of the District at the Glenview New Construction Project, in an amount not-to exceed \$0.00. The term of this Agreement shall commence on February 26, 2014 and shall conclude no later than February 26, 2019.

**Background** The scope of the project is to request that the District adjust the provision of the existing contract in two ways. 1) To revise the estimated construction budget from \$26,835,803.00 to the adjusted base budget of \$29,347,000. 2) Adjust the definition of the portion of the professional services in the amount of \$260,000 from "Interim Housing Design and Documentation Allowance" to "Various Services including Interim Housing, Neighborhood Engagement, Hybrid Scheme Development, Porch Retention, and CHP5."

**Discussion** Changes to scope, project value and services as follows: 1) The addition of support spaces and building square footage to accommodate the most current District Standards, beyond those approved by the District in the HKIT 2012 master plan program. 2) The neighborhood engagement process and the development of Hybrid Schemes related to the retention of portions of the existing building.

**LBP** (Local Business Participation Percentage) 100.00%

**Recommendation** Approval by the Board of Education of an Amendment No. 1, Agreement for Architectural Services with HKIT for Architectural Services on behalf of the District at the Glenview New Construction Project, in an amount not-to exceed \$0.00. The term of this Agreement shall commence on February 26, 2014 and shall conclude no later than February 26, 2019.

**Fiscal Impact** Measure J

## Attachments

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





## AMENDMENT NO. 1 TO INDEPENDENT CONSULTANT CONTRACT

This Amendment is entered into between the Oakland Unified School District (OUSD) and HKIT. OUSD entered into an Agreement with CONTRACTOR for services on August 27, 2014, and the parties agree to amend that Agreement as follows:

<b>1. Services:</b>	<input type="checkbox"/> The scope of work is <u>unchanged</u> .	<input checked="" type="checkbox"/> The scope of work has <u>changed</u> .
<b>If scope of work changed:</b> Provide brief description of revised scope of work including description of expected final results, such as services, materials, products, and/or reports; attach additional pages as necessary. <u>Attach revised scope of work.</u>		
The CONTRACTOR agrees to provide the following amended services: <u>The scope of the project is to request that the District adjust the provision of the existing contract in two ways. 1) To revise the estimated construction budget from \$26,835,803.00 to the adjusted base budget of \$29,347,000. 2) Adjust the definition of the portion of the professional services in the amount of \$260,000 from "Interim Housing Design and Documentation Allowance" to "Various Services including Interim Housing, Neighborhood Engagement, Hybrid Scheme Development, Porch Retention, and CHPS."</u>		
<b>2. Terms (duration):</b>	<input type="checkbox"/> The term of the contract is <u>unchanged</u> .	<input type="checkbox"/> The term of the contract has <u>changed</u> .
<b>If term is changed:</b> The contract term is extended by an additional _____, and the amended expiration date is _____.		
<b>3. Compensation:</b>	<input checked="" type="checkbox"/> The contract price is <u>unchanged</u> .	<input type="checkbox"/> The contract price has <u>changed</u> .
<b>If the compensation is changed:</b> The contract price is amended by		
<input checked="" type="checkbox"/> Increase of \$00.00 to original contract amount		
<input type="checkbox"/> Decrease of \$ _____ to original contract amount		
and the new contract total is <b>Two million, seven hundred twenty-four thousand, nine hundred dollars and no cents (\$2,724,900.00)</b>		

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

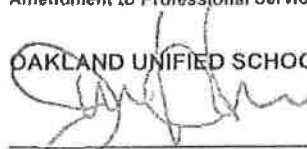
**5. Amendment History:**

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

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

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

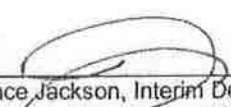
OAKLAND UNIFIED SCHOOL DISTRICT

  
James Harris, President,  
Board of Education

8/13/15  
Date

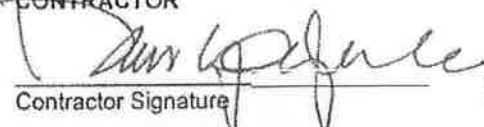
  
Antwan Wilson, Superintendent  
Secretary, Board of Education

8/13/15  
Date

  
Lance Jackson, Interim Deputy Chief  
Facilities, Planning and Management

7/9/15  
Date

CONTRACTOR

  
Contractor Signature

June 3, 2015  
Date

Dara A. Youngdale, President  
Print Name, Title

File ID Number: 15-1465  
Introduction Date: 8/12/15  
Enactment Number: 15-1218  
Enactment Date: 8/12/15  
By: OLD

## EXHIBIT "A" Scope of Work

Contractor Name: HKIT

Billing Rate: Zero dollars and no cents (\$00.00)

## 1. Description of Services to be Provided

The scope of the project is to request that the District adjust the provision of the existing contract in two ways. 1) To revise the estimated construction budget from \$26,835,803.00 to the adjusted base budget of \$29,347,000. 2) Adjust the definition of the portion of the professional services in the amount of \$260,000 from "Interim Housing Design and Documentation Allowance" to "Various Services including Interim Housing, Neighborhood Engagement, Hybrid Scheme Development, Porch Retention, and CHPS."

## 2. Specific Outcomes:

Create equitable opportunities for learning; and provide accountability for quality.

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

<input type="checkbox"/> 0 Ensure a high quality instructional core	<input type="checkbox"/> 0 Prepare students for success in college and careers
<input type="checkbox"/> 0 Develop social, emotional and physical health	<input type="checkbox"/> 0 Safe, healthy and supportive schools
<input checked="" type="checkbox"/> X Create equitable opportunities for learning	<input checked="" type="checkbox"/> x Accountable for quality
<input type="checkbox"/> 0 High quality and effective instruction	<input type="checkbox"/> 0 Full service community district

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 6-11-2015*  
 Susie Butler-Berkley  
 Contract Analyst



ARCHITECTS

## EXHIBIT A

538 NINTH STREET SUITE 240 • OAKLAND, CALIFORNIA 94607 • T 510 625 9800 • F 510 625 9801 • WWW.HKIT.COM • A CALIFORNIA CORPORATION

March 18, 2015

Mr. Tadashi Nakadegawa, Director of Facilities  
Mr. Wil Newby, Project Manager  
Oakland Unified School District  
955 High Street  
Oakland, California 94601

Reference: Glenview Elementary School – Contract Adjustments  
Oakland Unified School District - Contract #13134  
HKIT #10202

Dear Mr. Nakadegawa and Mr. Newby,

Since the time of the execution of our contract for the Glenview Renovation Project No 13134, dated January 24, 2014 and fully executed on February 26, 2014, there have been a number of changes in project scope, project value and required professional design services. We have been in discussion with the District regarding these changes during the last year, and most recently reviewed these changes with the two of you on Friday, March 6, 2015. As discussed in our meeting and defined in both our Hybrid Scheme Development letter dated September 12, 2014 and Contract Worksheet dated March 6, 2015, the changes to scope, project value and services are in essence as follows:

- The addition of support spaces and building square footage to accommodate the most current District Standards, beyond those approved by the District in our 2012 master plan program
- The neighborhood engagement process and the development of Hybrid Schemes related to the retention of portions of the existing building
- Architectural and Structural Engineering design services related to the retention of the existing porch
- The need for additional Acoustic Engineering related to the most recent CHIPS standards
- The deletion of a portion of our scope of services related to Interim Housing based on the decision to relocate the school community to the Sante Fe site

We are not requesting any additional monies, rather are requesting that the District adjust the provisions of our contract in two ways. First, to revise the estimated base construction budget from \$26,835,803 to the adjusted base budget of \$29,347,000 verbally approved by Mr. Tim White. Second, to adjust the definition of the portion of our professional services in the amount of \$260,000 from "Interim Housing Design and Documentation Allowance" to "Various Services including Interim Housing, Neighborhood Engagement, Hybrid Scheme Development, Porch Retention, and CHIPS".

### PRINCIPALS

THOMAS C. BRUJITING AIA  
RICHARD CALDWELL AIA  
DARA A. YOUNGDALE AIA

### DIRECTOR OF DESIGN

ROD HENMITAIA NOMA

### SENIOR ASSOCIATES

DANIEL KALLENBACH AIA  
TAD SEKINO  
ERWIN WON

### ASSOCIATES

JEFF EVANS AIA LEED AP  
JOHN FRANDO AIA  
FELIX HUNZIKER  
SONJA MARCK LEED AP  
PAUL MCILWEE AIA  
JASON A.D. SHIRRIFF AIA  
CHUCK WONG



HKIT ARCHITECTS

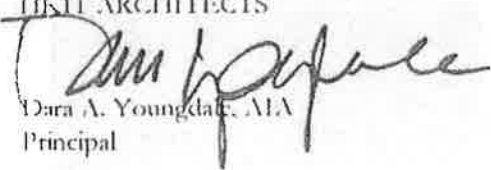
Mr. Tadashi Nakadegawa, Director of Facilities  
Oakland Unified School District


March 18, 2015  
Page No. 2.

As discussed, these requests are agreeable in concept to the two of you but need to be reviewed by legal counsel with a recommended action to memorialize these changes. We have attached our documentation for your reference. If you or your legal team have any questions, do not hesitate to call.

Very truly yours,

HKIT ARCHITECTS

  
Dara A. Youngdale, AIA  
Principal

  
Thomas C. Brutting, FMA  
Principal

DAY/hr  
enc. OUSD Glenview - Contract Worksheet

Project Construction Budget		Notes
Original Project Budget	\$ 26,835,803.00	
Adjusted Project Budget	\$ 29,347,000.00	Difference in construction Budget
Services Contract Terms		
Base contract	2,402,400.00	
interim housing allowance	260,000.00	
reimbursables	50,000.00	
boundary/survey	12,500.00	
<b>TOTAL</b>	<b>2,724,900.00</b>	
Services in addition to base scope		
Hybrid Scheme Concept	70,247.00	
Porch Retention - Architectural	15,000.00	
Porch Retention - Structural	30,910.00	
Acoustics related to CHPS	31,350.00	Not in original services
Community Meetings/ Prep	5,000.00	Extent of engagement not in original services
<b>SUBTOTAL</b>	<b>147,507.00</b>	
Other		
Interim Housing (spent to date)	23,040.00	
Analysis of site options; Edna Brewer, Lakeview, Sante Fe		
Added Scope (Classroom, District Standards)	100,000.00	
(Assume 5% x 4,000 SF x \$500 if in original scope)		
<b>SUBTOTAL ADD</b>	<b>270,547.00</b>	
Subtotal vs. Interim housing fees	260,000.00	
	<b>10,547.00</b>	HKIT OK to absorb cost



# HKIT ARCHITECTS

September 12, 2011

Mr. Tadashi Nakadeyawa, Director of Facilities  
Mr. Wil Newby, Project Manager  
Oakland Unified School District  
555 High Street  
Oakland, California 94601

Reference: Glenview Elementary School - Hybrid Scheme Development  
Oakland Unified School District  
HKIT #10202

Dear Mr. Nakadeyawa:

HKIT Architects is pleased to provide the following finalized proposal for services for the conceptual design of a Hybrid Scheme at the Glenview Elementary School site. Our work, which is mostly completed, included the development of plan options for the retention of portions of the existing building, facade, and courtyard elements, as well as the analysis of the structural requirements required to upgrade the existing structure if the building or portions of the building were remodeled and retained, plus the development of a cost estimate for the selected scheme. These services are provided by our structural engineer R.P. Gallagher Associates, Inc. and our cost estimator Neil Bolin. We augmented our architectural team with Page & Furubull, an architectural firm who were be available for consultation on an as need basis.

Over the summer we had a number of meetings, pursued a number of options and on August 15th received Board approval for the "Glenview Plan" which retains a portion of the building facade, porch, element and a portion of the front courtyard. Since that date, we have created a new massing model to reflect the approved scheme and our work on the Hybrid Scheme is complete, over the cost estimate. Our estimator will prepare an estimate as soon as we have confirmed the program and building area with the District.

## PROPOSED COMPENSATION

We propose working on a Fee Basis of Seventy Thousand, Two Hundred and Forty Seven and one hundred Dollars (\$70,247.00). The services are defined in the attached matrix dated September 12, 2011. These services will be rolled into our current contract of Two Million, Seven Hundred and Twenty Four Thousand, Nine Hundred and one hundred Dollars (\$2,724,900.00). However, they will be accounted for as an expense against our Interim Housing Fee of Two Hundred and Sixty Thousand and one hundred Dollar (\$260,000.00). This is being agreed to with an understanding that the District will not utilize HKIT's services to design a new interim housing campus, rather, the District will move the Glenview school to the existing Santa Fe site. If this changes and HKIT and team is required to provide design services on a new interim campus, we will request that our contract be adjusted to reflect this additional service.

\* prior the District's contract, we will bill reimbursement expenses, if any, as set with an estimated

09/12/11 10:20 AM

PROPOSAL

DIRECTOR OF DESIGN

ARCHITECT ASSOCIATE

ASSOCIATES





HKIT ARCHITECTS

The Office of National Security, Director of Facilities  
1000 West 10th Street, Suite 1000, Denver, CO 80202

September 17, 2014  
Page No. 2

We are pleased to have the opportunity to work with you on this project. We look forward to  
working with you on this project. We look forward to working with you on this project.  
We look forward to working with you on this project.

Very truly yours,

HKIT ARCHITECTS

Dara V. Youngdale, AIA  
Principal

Thomas C. Bruting, F.AIA  
Principal

D.V. Youngdale  
1000 West 10th Street, Suite 1000, Denver, CO 80202

ACKNOWLEDGED AND AGREED  
TADASHI NAKADEGAWA  
DIRECTOR OF FACILITIES, ONSD

By: \_\_\_\_\_  
Date: \_\_\_\_\_

OUSD Glenview - Hybrid Scheme Development  
Additional Services Summary

HKIT Architects

FINAL: 9/12/2014

HKIT Architects

Time Period (Summer 2014)

June 30th thru June 15th

Event/Meeting/Task

Owner (PIC)

Staff (PA)

Red (Designer)

Vendor (Designer)

Kick-off Hybrid Scheme and follow-up on directives

10

7.5

0.5

5.5

Phone conversation w/ Tadashi on June 5th directive to develop hybrid scheme, obtain consulting services  
Arrange for, meet with consultants  
Prep for in-house mtg with District including the development of 3 options with varying degrees of building retention

June 16th thru June 30th

Prep for in-house meeting on June 19th and follow-up

12.5

22

1

34

Present 3 options to team at OUSD  
Introduction of Page & Turnbull  
Directive at meeting, develop Hybrid 1 Plan (extensive building retention)  
Coordination of Consultant Team, structural, cost, resource architect  
(Note - Concurrent access work with DSA under base contract)

July 1st thru July 21st

Prep for and attend Parent Meeting on July 21st

12.5

11

Prep for meeting  
Present Hybrid 1 Plan

July 22nd thru July 31st

Prep for and attend Parent/DHA Mtg (July 31st)

13.5

17

2

26

Directive after Mtg. Develop Hybrid Diagram A (porch facade only) and Hybrid Diagram B (east/south facade)  
Prep for meeting, prepare graphics  
Talk and meet with legal counsel, review Diagrams A and B  
Present Porch Hybrid Diagram A (porch facade)

August 1st thru August 15th

Prep for and attend Board Meeting August 15th

8

7.5

6

Prep for and attend Board Meeting and Closed Session  
Board Meeting  
Refine graphics, annotations

August 16th thru August 31st

Follow-up, meeting model

2.5

15.5

Hours to complete diagram model Hybrid Diagram A

total hours

59

80.5

3.5

71.5

214.5

architectural costs

\$ 32,913

Ron Gallagher - Structural

Prepare Analysis of Hybrid 1 Plan (extensive building retention, full scheme upgrade) Work completed in July to meet schedule.

\$ 23,320

Neil Bohn - Cost

Prepare cost estimates for options and final scheme.

\$ 9,064

Page and Turnbull - Arch

Prepare report, act as resource to team. Work stopped. Cost for work performed.

\$ 2,750

total costs

\$ 70,247

Client#: 177

HKITARCHI

ACORD™

## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

8/27/2014

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).

<b>PRODUCER</b> Dealey, Renton & Associates P. O. Box 12675 Oakland, CA 94604-2675 510 465-3090		<b>CONTACT NAME:</b> Nancy Ferrick <b>PHONE (A/C, No, Ext):</b> 510 465-3090 <b>E-MAIL ADDRESS:</b> nferrick@insdra.com <b>FAX (A/C, No):</b> 510 452-2193	
<b>INSURED</b> HKIT Architects 538 Ninth Street, Suite 240 Oakland, CA 94607		<b>INSURER(S) AFFORDING COVERAGE</b>	
		<b>INSURER A:</b> Sentinel Insurance Co. LTD <b>NAIC #</b> 11000	
		<b>INSURER B:</b> American Automobile Ins. Co. <b>21849</b>	
		<b>INSURER C:</b> XL Specialty Insurance Co. <b>37885</b>	
		<b>INSURER D:</b>	
		<b>INSURER E:</b>	

**COVERAGES** **CERTIFICATE NUMBER:** **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 INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<b>GENERAL LIABILITY</b> <input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> <b>CLAIMS-MADE</b> <input checked="" type="checkbox"/> <b>OCCUR</b> GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> <b>POLICY</b> <input checked="" type="checkbox"/> <b>PROJECT</b> <input type="checkbox"/> <b>LOC</b>	X	X	57SBWL1922	08/28/2014	08/28/2015	EACH OCCURRENCE \$1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000 \$
A	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> <b>ANY AUTO ALLOWED AUTOS</b> <input type="checkbox"/> <b>SCHEDULED AUTOS</b> <input checked="" type="checkbox"/> <b>HIRED AUTOS</b> <input checked="" type="checkbox"/> <b>NON-OWNED AUTOS</b> <b>UMBRELLA LIAB</b> <input type="checkbox"/> <b>OCCUR</b> <b>EXCESS LIAB</b> <input type="checkbox"/> <b>CLAIMS-MADE</b> <b>DED</b> <b>RETENTION \$</b>	X	X	57SBWL1922	08/28/2014	08/28/2015	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ EACH OCCURRENCE \$ AGGREGATE \$ \$
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> <b>Y/N</b> (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	X	N/A	WZP81021127	09/01/2014	09/01/2015	<input checked="" type="checkbox"/> <b>WC STATUTORY LIMITS</b> <input type="checkbox"/> <b>OTHER</b> E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
C	<b>Professional Liability</b>			DPR9717563	08/28/2014	08/28/2015	\$1,000,000 per Claim \$2,000,000 Annu Aggr.

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

General Liability Policy excludes claims arising out of the performance of professional services.  
 PROJECT: Glenview Renovation. Oakland Unified School District and its directors, officers, employees, agents and representatives are named as Additional Insureds to General Liability per policy form wording.

## CERTIFICATE HOLDER

Oakland Unified School District  
 955 High Street  
 Oakland, CA 94601

## CANCELLATION

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

*Spardell, CDRU*

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## AMENDMENT INDEPENDENT CONTRACT ROUTING FORM

### Project Information

Project Name	Glenview New Construction	Site	119
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### 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	HKIT Architects	Agency's Contact	Dara Youngdale				
OUSD Vendor ID #	V022233	Title	Architect of Record				
Street Address	538 Ninth Street, Suite 240	City	Oakland	State	CA	Zip	94607
Telephone	510-625-9800	Policy Expires	8-28-2015				
Contractor History	Previously been an OUSD contractor? X Yes <input type="checkbox"/> No		Worked as an OUSD employee? <input type="checkbox"/> Yes x No				
OUSD Project #	13134						

### Term

Date Work Will Begin	2-26-2014	Date Work Will End By (not more than 5 years from start date)	2-26-2019
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### Compensation

Total Contract Amount	\$	Total Contract Not To Exceed	\$2,724,900.00
Pay Rate Per Hour (If Hourly)	\$	If Amendment, Changed Amount	\$ 0.00
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 before completing requisition.

Resource #	Funding Source	Org Key	Object Code	Amount
9350	Measure J	1199905820	6215	\$0.00

### Approval and Routing (in order of approval steps)

Services cannot be provided before the contract is fully approved and a Purchase Order is issued. Signing this document affirms that to your knowledge services were not provided before a PO was issued.

	Division Head	Phone	510-535-7038	Fax	510-535-7082
1.	Director, Facilities Planning and Management	Signature	<i>Leon M. Martin</i>	Date Approved	6/24/2015
2.	General Counsel, Department of Facilities Planning and Management	Signature	<i>[Signature]</i>	Date Approved	7-8-2015
3.	Interim Deputy Chief, Facilities Planning and Management	Signature	<i>[Signature]</i>	Date Approved	7/9/15
4.	Chief Operations Officer Facilities Planning and Management	Signature	<i>[Signature]</i>	Date Approved	
5.	President, Board of Education	Signature	<i>[Signature]</i>	Date Approved	

Board Office Use: Legislative File Info.	
File ID Number	14-0309
Committee	Facilities
Introduction Date	2-26-2014
Enactment Number	14-0334
Enactment Date	2-26-14



OAKLAND UNIFIED  
SCHOOL DISTRICT

Community Schools, Thriving Students

## Memo

To Board of Education

From Dr. Gary, Ed.D., Acting Superintendent and Secretary, Board of Education  
By: Vernon Hal, Deputy Superintendent, Business Operations *VHX*  
Timothy White, Associate Superintendent, Facilities Planning and Management

Board Meeting Date February 26, 2014

Subject Agreement for Architectural Services - HKIT Architects - Glenview Renovation Project

**Action Requested** Approval by the Board of Education of an Agreement for Architectural Services with HKIT Architects for Architect and Engineering Services on behalf of the District at Glenview Renovation Project, in an amount not-to exceed \$2,724,900.00. The term of this Agreement shall commence on February 26, 2014 and shall conclude no later than February 26, 2019.

**Background** HKIT Architects to provide the design of all new K-5 elementary school and related site improvements on the existing Glenview Elementary School site.

**Local Business Participation Percentage** 100.00%

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

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



## OAKLAND UNIFIED SCHOOL DISTRICT

*Community Schools, Thriving Students*

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planned approach is intended to ensure safety, cleanliness, and orderliness for

all individuals participating in the learning process.

The basic facility needs of students such as proper lighting, functional roofs, noise control and well maintained buildings, not only convey the message that

we value our students and teachers but may foster a sense of school pride and community ownership which may improve attitudes towards learning. The implementation of the Facilities Master Plan is our first step in that direction.

### Recommendation

Approval by the Board of Education of an Agreement for Architectural Services with HKIT Architects for Architect and Engineering Services on behalf of the District at Glenview Renovation Project, in an amount not-to exceed \$2,724,900.00. The term of this Agreement shall commence on February 26, 2014 and shall conclude no later than February 26, 2019,

### Fiscal Impact

Measure J Fund 21

### Attachments

- Agreement for Architectural Services including scope of work
- Certificate of Insurance



HKIT ARCHITECTS

## EXHIBIT A

Mr. Tadashi Nakadegawa, Director of Facilities  
Oakland Unified School District

January 22, 2014  
Page No. 2.

DSA approvals package, and one continuous phase of construction. The District may bid the project as a traditional design/bid/build or contract with a lease/leaseback contractor.

### PROPOSED CONTRACT INCLUDING REIMBURSABLE EXPENSES AND BOUNDARY AND TOPOGRAPHIC SURVEY

As per the District Contract, we propose working on a total Fee Basis of Two Million, Seven Hundred and Twenty-Four Thousand, Nine Hundred and 00/100 Dollars (\$2,724,900.00).

As per the District Contract, we will bill reimbursable expenses at our cost with an estimated allowance noted below. The Boundary and Topographic Survey will be included in our overall contract fees and billed as a direct expense to the District.

• Base Professional Services	\$2,184,000.00
• Owner's 10% Design Contingency	\$ 218,400.00
Sub-Total	\$2,402,400.00
• Interim Housing Design and Documentation Allowance	\$ 260,000.00
• Reimbursable Expenses Allowance	\$ 50,000.00
• Boundary and Topographic Survey	\$ 12,500.00
Total	\$2,724,900.00

### EXCLUSIONS


Project scope and services exclude:

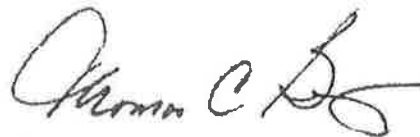
- Temporary Housing (On-site Relocatable Building) Design Development and Documentation
- Seismic Analysis of Existing Buildings
- LEED Documentation/Fundamental Commissioning & Enhanced Commissioning
- SWPPP

Should you have any questions or comments please do not hesitate to call. We look forward to continuing our work with the District and the Glenview Elementary School site staff and community.

Very truly yours,

HKIT ARCHITECTS

  
Dara A. Youngblood, P.E.  
Principal



Thomas C. Brutting, FAIA  
Principal

DAY/nmh

cc. Cesar Monterrosa, Facilities Coordinator, Oakland Unified School District  
Joseph Cavanagh, Bond Director, SGI Construction Management  
Victor Manansala, Design Manager, SGI Construction Management





HKIT ARCHITECTS

## EXHIBIT A

538 NINTH STREET SUITE 240 • OAKLAND, CALIFORNIA 94607 • T 510 625 9800 • F 510 625 9801 • WWW.HKIT.COM • A CALIFORNIA CORPORATION

November 14, 2013

Revised: January 8, 2014

Revised: January 22, 2014

Mr. Tadashi Nakadegawa  
Director of Facilities  
Oakland Unified School District  
955 High Street  
Oakland, California 94601

Reference: Glenview Elementary School – New School Project  
Oakland Unified School District  
HKIT #10202

Dear Mr. Nakadegawa:

HKIT Architects is pleased to provide the following proposal for services for the design of an all new K-5 elementary school and related site improvements on the existing Glenview Elementary School site. The new construction scope as defined in our Master Plan Report includes 53,700 sf (+/-) of one- and two-story building structures, a partial basement area, and extensive on-site improvements. The existing permanent structures, portable buildings and much of the existing site improvements will be removed as a part of the project scope. The estimated construction budget is \$25,955,113.00 plus \$880,690.00 for photovoltaic panels resulting in a total estimated construction budget of \$26,835,803.00. Project goals are to follow CHPS design guidelines and to achieve Net-Zero classification.

Our proposed scope of services includes architectural design services, structural engineering, mechanical/electrical/plumbing engineering, photovoltaic design, civil engineering, landscape design, fire alarm/intrusion alarm design, food services and cost estimating services. Our services include program and conceptual design verification and refinement, full design development and documentation, the DSA approvals process, construction administration and closeout services in addition to daylight modeling and energy use modeling. The construction documents will be produced in Revit.

Our scope of services includes design services related to on-site or off-site interim housing, work which began during the master planning phase. Options may include the installation of on-site relocatable classrooms to house some or all of the student body, the development of an off-site relocatable complex on another school property or the use of an existing school campus. HKIT will design options and then provide design development and construction documentation for the selected scheme. We have provided an allowance for these services as a part of our proposal.

Design work is scheduled to begin in February 2014 and construction documents are scheduled to be submitted to DSA in February 2015. Construction is scheduled to start in August 2015 and last approximately 19 months with an estimated completion date of February 2017. Our proposed services are based on one set of construction documents, one

### PRINCIPALS

THOMAS C. BRUTTING AIA  
RICHARD CALDWELL AIA  
DENNIS I. OKAMURA AIA LEED AP  
DARA A. YOUNGDALE AIA LEED AP

### DIRECTOR OF DESIGN

ROO HENMI AIA LEED AP NOMA

### SENIOR ASSOCIATES

TAD SEKINO  
DANIEL KALLENBACH AIA LEED AP  
ERWIN WON LEED AP

### ASSOCIATES

JOHN FRANDO AIA LEED AP  
FELIX HUNZIKER  
PAUL M. B. MCELWEE AIA LEED AP  
JASON A.D. SHIRRIFF AIA LEED AP  
CHUCK WONG

**AGREEMENT FOR ARCHITECTURAL SERVICES**

**OAKLAND UNIFIED SCHOOL DISTRICT**

**WITH**

**HKIT ARCHITECTS**

**FOR**

**GLENVIEW ELEMENATY SCHOOL RENOVATION PROJECT**

**JANUARY 24, 2014**

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## AGREEMENT FOR ARCHITECTURAL SERVICES

This Agreement for Architectural Services is made as of January 24, 2014, between the Oakland Unified School District, a California public school district, ("District") and HKIT Architects ("Architect") (both collectively "Parties"), for the following project ("Project"):

That for and in consideration of the mutual covenants herein contained, the Parties hereto agree as follows:

### Article 1. Definitions

- 1.1. In addition to the definitions above, the following definitions for words or phrases shall apply when used in this Agreement, including all Exhibits:
  - 1.1.1. **Agreement:** The Agreement consists exclusively of this document and all identified exhibits attached and incorporated by reference.
  - 1.1.2. **Architect:** The architect listed in the first paragraph of this Agreement, including all Consultants to the Architect.
  - 1.1.3. **As-Built Drawings ("As-Built"):** Any document prepared and submitted by District contractor(s) that details on a Conforming Set, the actual construction performed during the Project, including changes necessitated by change orders.
  - 1.1.4. **Bid Set:** The plans, drawings, and specifications at the end of the Construction Documents Phase that the Division of the State Architect ("DSA") has approved and that the District can use to go out to bid for construction of the Project.
  - 1.1.5. **Conforming Set:** The plans, drawings, and specifications at the end of the Bidding Phase that incorporate all addenda, if any, issued during the Bidding Phase. The Architect shall ensure that DSA has approved all revisions to the Bid Set that are incorporated onto the Conforming Set and for which DSA approval is required.
  - 1.1.6. **Construction Budget:** The total amount indicated by the District for the entire Project plus all other costs, including design, construction, administration, financing, and all other costs.
  - 1.1.7. **Construction Cost Budget:** The total cost to District of all elements of the Project designed or specified by the Architect, as adjusted at the end of each design phase in accordance with this Agreement. The Construction Cost Budget does not include the compensation of the Architect and the Architect's consultants, the cost of the land, rights-of-way, financing or other costs which are the responsibility of the District, including

AGREEMENT FOR ARCHITECTURAL SERVICES

OAKLAND UNIFIED SCHOOL DISTRICT

construction management.

- 1.1.8. **Consultant(s)**: Any and all consultant(s), sub-consultant(s), subcontractor(s), or agent(s) to the Architect.
- 1.1.9. **District**: The Oakland Unified School District.
- 1.1.10. **DSA**: The Division of the State Architect.
- 1.1.11. **Record Drawings**: A final set of drawings prepared by the Architect that incorporates all changes from all As-Builts, sketches, details, and clarifications.
- 1.1.12. **Service(s)**: All labor, materials, supervision, services, tasks, and work that the Architect is required to perform and that are required by, or reasonably inferred from, the Agreement, and that are necessary for the design and completion of the Project.
- 1.1.13. **Visually Verify**: To verify to the fullest extent possible by physical inspection and reasonable investigation and without any destructive action.

## **Article 2. Scope, Responsibilities, And Services Of Architect**

- 2.1. Architect shall render the Services as described in Exhibit "A," commencing with receipt of a written Notice to Proceed signed by the District representative. Architect's Services will be completed in accordance with the schedule attached as Exhibit "C."
- 2.2. Architect shall provide Services that shall comply with professional architectural standards including the standard of care applicable to architects designing public school facilities and applicable requirements of federal, state, and local law, including, but not limited to, the requirements of the California Business and Professions Code, the California Education Code, the California Code of Regulations, including the California Green Building Standards Code, effective 01/01/2011, and other amendments. All persons providing professional services hereunder shall be properly licensed as required by California law.
- 2.3. The District intends to award the Project to contractor(s) pursuant to a competitive bid process and a construction manager and/or contractor(s) may provide input to the Architect on the constructability and design features of the Project.
- 2.4. Architect acknowledges that all California public school districts are now or will soon be obligated to develop and implement the following storm water requirements, without limitation:
  - 2.4.1. A municipal Separate Storm Sewer System (MS4). An MS4 is a system of conveyances used to collect and/or convey storm water, including, without limitation, catch basins, curbs,

gutters, ditches, man-made channels, and storm drains.

2.4.2. A Storm Water Pollution Prevention Plan (SWPPP) at:

2.4.2.1. Sites where the District engages in maintenance (e.g., fueling, cleaning, repairing) of transportation activities.

2.4.2.2. Construction sites where:

2.4.2.2.1. one (1) or more acres of soil will be disturbed, or

2.4.2.2.2. the project is part of a larger common plan of development that disturbs more than one (1) or more acres of soil.

2.4.3. Architect shall conform its design work to the District's storm water requirements indicated above, that are approved by the District and applicable to the Project, at no additional cost to the District. In addition, as required, Architect shall develop a grading and drainage plan and a site plan from architectural information showing a final development of the site. This drawing will also include a horizontal and vertical control plan and a utility infrastructure plan. The Services described in this Subparagraph shall be provided by a professional civil engineer who contracts with or is an employee of the Architect.

2.5. Architect shall contract for or employ at Architect's expense, consultant(s) to the extent deemed necessary for completion of the Project including, but not limited to, architects, mechanical, electrical, structural, civil engineers, landscapers, and interior designers, licensed as such by the State of California as part of the basic services under this agreement. The names of consultant(s) shall be submitted to the District for approval prior to commencement of Services, as indicated below. The District reserves the right to reject the Architect's use of any particular consultant. Nothing in the foregoing procedure shall create any contractual relationship between the District and any consultant employed by the Architect under terms of the Agreement. Architect shall require each of the consultants retained by it to execute agreements with the standard of care and indemnity provisions commensurate with this Agreement, but Architect shall remain solely responsible and liable to District for all matters covered by this Agreement.

2.6. Architect shall coordinate with District personnel or its designated representatives as may be requested and desirable, including with other professionals employed by the District for the design, coordination or management of other work related to the Project. This shall include, without limitation, coordination with the persons responsible for operation of the District's Labor Compliance Program, if any. If the Architect employs consultant(s), the Architect shall ensure



that its contract(s) with its consultant(s) include language notifying the consultant(s) of the District's Labor Compliance Program, if any.

- 2.7. Architect shall identify the regulatory agencies that have jurisdiction over essential building and design elements and coordinate with and implement the requirements of the regulatory agencies, including, without limitation, the California Department of Education (CDE), the Office of Public School Construction (OPSC), the Department of General Services (DGS), DSA Fire/Life Safety, DSA Access Compliance Section, DSA Structural Safety Section, State Fire Marshal and any regulatory office or agency that has authority for review and supervision of school district construction projects.
- 2.8. Architect shall provide Services required to obtain any local agencies' approval for off-site work related to the Project including review by regulatory agencies having jurisdiction over the Project.
- 2.9. Architect shall coordinate with the District's DSA Project Inspector(s).
- 2.10. Architect shall give efficient supervision to Services, using its best skill and attention. Architect shall carefully study and compare all Contract Documents, Drawings, Specifications, and other instructions and shall at once report to District, Construction Manager, and Contractor, any error, inconsistency, or omission that Architect or its employees may discover, in writing, with a copy to District's Project Inspector(s). Architect shall have responsibility for discovery of errors, inconsistencies, or omissions.
- 2.11. Architect recognizes that the District may obtain the services of a Construction Manager and that Architect may have to assume certain coordination and management responsibilities, including tracking RFI's, providing RFI responses, and leading all coordination meetings between the District, Project Inspectors, and contractors on each of the Projects. The District reserves the right to retain the services of a Program Manager or Construction Manager or both at any time. The Construction Manager, if any, shall be authorized to give Architect Services authorizations and issue written approvals and Notices to Proceed on behalf of District. The District reserves the right to designate a different Construction Manager at any time. Any task, including, but not limited to, reviews or approvals that the District may perform pursuant to this Agreement may be performed by the Construction Manager, unless that task indicates it shall be performed by the governing board of the District. In addition, the District may have the Program Manager or Construction Manager perform a constructability review of Architect's design documents. Architect shall conform any design documents to the constructability review as part of the Services under this Agreement and shall not be entitled to any compensation as Extra Services for this activity.

- 2.12. Architect shall provide computer-generated pictures downloaded to computer files, updated as requested by the District, that the District may use on its website.
- 2.13. As part of the basic Services pursuant to this Agreement, Architect is not responsible for:
- 2.13.1. Ground contamination or hazardous material analysis.
  - 2.13.2. Any asbestos and/or lead testing, design or abatement; however, it shall coordinate and integrate its work with any such information provided by District.
  - 2.13.3. Compliance with the California Environmental Quality Act ("CEQA"), except that Architect agrees to coordinate its work with that of any CEQA consultants retained by the District, to provide current elevations and schematic drawings for use in CEQA compliance documents, and to incorporate any mitigation measures adopted by the District into the Project design at no additional cost to the District.
  - 2.13.4. Historical significance report.
  - 2.13.5. Soils investigation.
  - 2.13.6. Geotechnical hazard report, except as indicated in Exhibit "A."

**Article 3. Architect Staff**

- 3.1. The Architect has been selected to perform the Services herein because of the skills and expertise of key individuals.
- 3.2. The Architect agrees that the following key people in Architect's firm shall be associated with the Project in the following capacities [All blanks below must be filled in by Architect and approved by District]:

Principal In Charge: HKIT Architects (Dara Youngdale)

Project Director: HKIT Architects (Rod Henmi)

Project Architect(s): HKIT Architects (Jeff Evans)

Project Architect(s): HKIT Architects (Richard Ziegler)

Major Consultants:

MEP: Integral Group (Shannon Allison, Tyler Bradshaw, Darryl Singleton)

Civil: Ackland International, Inc. (Ekundayo Sowonmi)

Structural: RP Gallagher (Ronald Gallagher)

Food Service: Berlin Foods (Robert Colburn)

Fire Protection: AON Fire Protection Engineering Corp. (Manuelita David)

Landscape: Keller Mitchell & Co. (Jacque Keller)

- 3.3. The Architect shall not change any of the key personnel listed above without prior written approval by District, unless said personnel cease to be employed by Architect. In either case, District shall be allowed to interview and approve replacement personnel.
- 3.4. If any designated lead or key person fails to perform to the satisfaction of the District, then upon written notice the Architect shall have five (5) days to remove that person from the Project and replace that person with one acceptable to the District. All lead or key personnel for any consultant must also be designated by the consultant and are subject to all conditions previously stated in this paragraph.
- 3.5. Architect represents that the Architect has no existing interest and will not acquire any interest, direct or indirect, which could conflict in any manner or degree with the performance of Services required under this Agreement and that no person having any such interest shall be employed by Architect.
- 3.6. Architect shall comply with Education Code Section 17302(a) and agrees that any plans and/or specifications included in the Services shall be prepared under the supervision of licensed personnel, and that licensed personnel shall be in "responsible charge" of persons who observe the construction.

**Article 4. Schedule Of Services**

The Architect shall commence Services under this Agreement upon receipt of a Notice to Proceed and shall prosecute the Services diligently as described in Exhibit "A," so as to proceed with and complete the Services in compliance with the schedule in Exhibit "C." Time is of the essence and failure of Architect to perform Services on time as specified in this Agreement is a material breach of this Agreement. It shall not be a material breach if a delay is beyond the Architect's or its consultant(s)' reasonable control.

**Article 5. Construction Cost Budget**

- 5.1. Architect hereby accepts the District's established Construction Cost Budget and Project scope. In accordance with the Exhibit "A," the Architect shall have responsibility to further develop, review, and reconcile the Construction Cost Budget for the District at the beginning of the Project and at the completion of each design phase. The District and the Construction Manager shall also have responsibility to develop, review, and reconcile the Construction Cost Budget with the Architect.
- 5.2. Architect shall complete all Services as described in Exhibit "A," including all plans, designs, drawings, specifications and other construction documents, so that the cost to construct the work designed by the Architect will not exceed the Construction Cost Budget, as adjusted subsequently with the District's written approval. The Architect shall maintain cost controls throughout the Project to deliver the Project within the Construction Cost Budget.

5.3. If any of the following events occur:

5.3.1. The lowest responsive base bid received is in excess of five percent (5%) of the Construction Cost Budget, or

5.3.2. If the combined total of base bid and all additive alternates come in ten percent (10%) or more under the Construction Cost Budget, or

5.3.3. If the Construction Cost Budget increases in phases subsequent to the Schematic Design Phase due to reasonably foreseeable changes in the condition of the construction market in the county in which the District is located, in so far as these have not been caused by Acts of God, earthquakes, strikes, war, or energy shortages due to uncontrollable events in the world economy, then the District, in its sole discretion, has one or a combination of the following alternatives:

5.3.2.1. Give the Architect written approval on an agreed adjustment to the Construction Cost Budget.

5.3.2.2. Authorize the Architect to re-negotiate, when appropriate, and/or re-bid the Project within three (3) months time of receipt of bids (exclusive of District and other agencies' review time) at no additional cost to the District.

5.3.2.3. Terminate this Agreement if the Project is abandoned by the District, without further obligation by either party.

5.3.2.4. Within three (3) months time of receipt of bids, instruct Architect to revise the drawings and specifications (in scope and quality as approved by the District) to bring the Project within the Construction Cost Budget for re-bidding at no additional cost to the District.

**Article 6. Fee And Method Of Payment**

6.1. District shall pay Architect for all Services contracted for under this Agreement an amount equal to the following ("Fee"):

An amount equal to Two million, seven hundred twenty-four thousand, nine hundred dollars and no cents (\$2,724,900.00 ).  
]

6.2. District shall pay Architect the Fee pursuant to the provisions of Exhibit "D,"

6.3. Architect shall bill its work under this Agreement in accordance with

#### **Exhibit "D."**

- 6.4. No increase in Fee will be due from change orders generated during the construction period to the extent caused by Architect's error or omission.
- 6.5. The Architect's Fee set forth in this Agreement shall be full compensation for all of Architect's Services incurred in the performance hereof as indicated in Exhibit "D."
- 6.6. Regardless of the structure of Architect's Fee, the Architect's Fee may be adjusted downward if the Scope of Services of this Agreement is reduced by the District in accordance with this Agreement.

#### **Payment For Extra Services Or Changes**

District-authorized services outside of the scope in Exhibit "A" or District-authorized reimbursables not included in Architect's fee are "Extra Services." Any charges for Extra Services shall be paid by the District as described in Exhibit "B" only upon certification that the claimed Extra Services was authorized as indicated herein and that the Extra Services have been satisfactorily completed. If any service is done by Architect without prior written authorization by the Construction Manager or the District's authorized representative, the District will not be obligated to pay for such service. The foregoing provision notwithstanding, the Architect will be paid by the District as described in Exhibit "B" for Extra Services that the Construction Manager or the District's authorized representative verbally requests, provided that the Architect confirms such request in writing pursuant to the notice requirements of this Agreement, and proceeds with such Extra Services not earlier than two business days after the District receives confirmation of the request from the Architect.

#### **Article 7. Ownership Of Data**

- 7.1. Pursuant to Education Code section 17316, this Agreement creates a non-exclusive and perpetual license for District to use, at its discretion, all plans, including, but not limited to, record drawings, specifications, and estimates that the Architect or its consultants, prepares or causes to be prepared pursuant to this Agreement.
- 7.2. The Architect retains all rights to all copyrights, designs and other intellectual property embodied in the plans, record drawings, specifications, estimates, and other documents that the Architect or its consultants prepares or causes to be prepared pursuant to this Agreement.
- 7.3. The Architect shall perform the Services and prepare all documents under this Agreement with the assistance of Computer Aided Design Drafting (CADD) (e.g., AutoCAD) Technology. The Architect shall deliver to the District, on request, the tape and/or compact disc format and the name of the supplier of the software/hardware necessary to use the design file. As to any drawings that Architect provides in a

CADD file format, the District acknowledges that anomalies and errors may be introduced into data when it is transferred or used in a computer environment, and that the District should rely on hard copies of all documents.

- 7.4. In order to document exactly what CADD information was given to the District, Architect and District shall each sign a "hard" copy of reproducible documents that depict the information at the time Architect produces the CADD information. District agrees to release Architect from all liability, damages, and/or claims that arise due to any changes made to this information by anyone other than the Architect or Consultant(s) subsequent to it being given to the District.
- 7.5. Following the termination of this Agreement, for any reason whatsoever, the Architect shall promptly deliver to the District upon written request and at no cost to the District the following items (hereinafter "Instruments of Service") which the District shall have the right to utilize in any way permitted by statute:
  - 7.5.1. One set of the Contract Documents, including the bidding requirements, specifications, and all existing cost estimates for the Project, in hard copy, reproducible format.
  - 7.5.2. One set of fixed image CADD files in DXF format of the drawings that are part of the Contract Documents.
  - 7.5.3. One set of non-fixed image CADD drawing files in DXF or DWG or both format of the site plan, floor plans (architectural, plumbing, structural mechanical and electrical), roof plan, sections and exterior elevations of the Project.
  - 7.5.4. All finished or unfinished documents, studies, reports, calculations, drawings, maps, models, photographs, technology data and reports prepared by the Architect under this Agreement.
  - 7.5.5. The obligation of Section 8.5 of this Agreement shall survive the termination of this Agreement for any reason whatsoever.
- 7.6. In the event the District changes or uses any fully or partially completed documents without the Architect's knowledge or participation or both, the District agrees to release Architect of responsibility for such changes, and shall indemnify, defend and hold the Architect, harmless from and against any and all claims, liabilities, suits, demands, losses, costs and expenses, including, but not limited to, reasonable attorneys' fees, on account of any damages or losses to property or persons, including injuries or death, or economic losses, arising out of that change or use except to the extent the Architect is found to be liable in a forum of competent jurisdiction. In the event District uses any fully or partially completed documents without the Architect's full involvement, the District shall remove all title blocks

and other information that might identify the Architect and the Architect's consultants.

## **Article 8. Termination Of Contract**

- 8.1. If Architect fails to perform Architect's duties to the satisfaction of the District, or If Architect fails to fulfill in a timely and professional manner Architect's material obligations under this Agreement, or if Architect shall violate any of the material terms or provisions of this Agreement, the District shall have the right to terminate this Agreement, in whole or in part, effective immediately upon the District giving written notice thereof to the Architect. In the event of a termination pursuant to this subdivision, Architect may invoice District for all Services performed until the notice of termination, but District shall have the right to withhold payment and deduct any amounts equal to the District's costs because of Architect's actions, errors, or omissions that caused the District to terminate the Architect.
- 8.2. District shall have the right in its sole discretion to terminate the Agreement for its own convenience. In the event of a termination for convenience, Architect may invoice District and District shall pay all undisputed invoice(s) for Services performed until the District's notice of termination.
- 8.3. Except as indicated in this Article, termination shall have no effect upon any of the rights and obligations of the Parties arising out of any transaction occurring prior to the effective date of such termination.
- 8.4. The Architect has the right to terminate this Agreement if the District does not fulfill its material obligations under this Agreement. Such termination shall be effective after receipt of written notice from Architect to the District. Architect may invoice District and District shall pay all undisputed invoice(s) for Services performed until the Architect's notice of termination.
- 8.5. If, at any time in the progress of the Design of the Project, the governing board of the District determines that the Project should be terminated, the Architect, upon written notice from the District of such termination, shall immediately cease Services on the Project. The District shall pay the Architect only the fee associated with the Services provided, since the last invoice that has been paid and up to the notice of termination.
- 8.6. If the District suspends the Project for more than one hundred twenty (120) consecutive days, the Architect shall be compensated for Services performed prior to notice of that suspension. When the Project is resumed, the schedule shall be adjusted and the Architect's compensation shall be equitably adjusted to provide for expenses incurred in the resumption of the Architect's Services. If the District suspends the Project for more than two (2) years, the Architect may terminate this Agreement by giving written notice.

**Article 9. Indemnity/Architect Liability**

**9.1.**

To the furthest extent permitted by California law, Architect shall defend, indemnify, and hold free and harmless the District, its agents, representatives, officers, consultants, employees, trustees, and volunteers ("the indemnified parties") from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury of any kind, in law or equity ("Claim"), to property or persons, including personal injury and/or death, to the extent that any of the above arise out of, pertain to, or relate to, in whole or in part, the willful misconduct, recklessness, or negligent acts, errors, or omissions of Architect, its officials, officers, employees, subcontractors, consultants, or agents directly or indirectly arising out of, connected with, or resulting from the performance of the Services, the Project, or this Agreement, including without limitation the payment of all consequential damages.

**9.2.** Architect shall pay and satisfy any judgment, award or decree that may be rendered against the indemnified parties in any Claim. Architect shall also reimburse District for the cost of any settlement paid by District arising out of any Claim. Architect shall reimburse the indemnified parties for any and all legal expenses and costs, including expert witness fees and consultant fees, incurred by each of them in connection therewith or in enforcing the indemnity herein provided to the extent caused by the above agreement to indemnify. Architect's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by the indemnified parties. District shall have the right to accept or reject any legal representation that Architect proposes to defend the indemnified parties.

**9.3.** Any and all costs incurred by District, or for which District may reasonably become liable, to the extent caused by the negligence of Architect in its performance hereunder, including negligent delays, shall be paid by Architect to District or the District may withhold those costs from amounts owing to Architect.

**Article 10. Fingerprinting**

Pursuant to Education Code section 45125.2, District has determined on the basis of scope of Services in this Agreement of this Project, that Architect, subcontractors, and their employees will have only limited contact with pupils at most. Architect shall promptly notify District in writing of any facts or circumstances which might reasonably lead District to determine that contact will be more than limited as defined by Education Code section 45125.1(d).

**Article 11. Responsibilities Of The District**

**11.1.** The District shall examine the documents submitted by the Architect and shall render decisions so as to avoid unreasonable delay in the process of the Architect's Services.



- 11.2. The District shall verbally or in writing advise the Architect if the District becomes aware of any fault or defect in the Project, including any errors, omissions or inconsistencies in the Architect's documents. Failure to provide such notice shall not relieve Architect of its responsibility therefore, if any.
- 11.3. Unless the District and the Architect agree that a hazardous materials consultant shall be a consultant of the Architect, the District shall furnish the services of a hazardous material consultant or other consultants when such services are requested in writing by Architect and deemed necessary by the District or are requested by the District. These services shall include: asbestos and lead paint survey; abatement documentation; and specifications related to said matters which are to be incorporated into bid documents prepared by Architect. If the hazardous materials consultant is furnished by the District and not a consultant of the Architect, the specifications shall include a note to the effect that they are included in the Architect's bid documents for the District's convenience and have not been prepared or reviewed by the Architect. The note shall also direct questions about the specifications to its preparer.

**Article 12. Liability Of District**

- 12.1. Other than as provided in this Agreement, District's 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 District 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.
- 12.2. District shall not be responsible for any damage to persons or property as a result of the use, misuse or failure of any equipment used by Architect, or by its employees, even though such equipment be furnished or loaned to Architect by District.

**Article 13. Nondiscrimination**

- 13.1. Architect agrees that no discrimination shall be made in the employment of persons under this Agreement because of the race, national origin, ancestry, religion, age, physical or mental disability, sex, or sexual orientation of such person.
- 13.2. Architect shall comply with any and all applicable regulations and laws governing nondiscrimination in employment.

**Article 14. Insurance**

- 14.1. Architect shall comply with the insurance requirements for this Agreement, set forth in Exhibit "E."

- 14.2. Architect shall provide certificates of insurance and endorsements to District prior to commencement of the work of this Agreement as required in Exhibit "E."

**Article 15. Covenant Against Contingent Fees**

Architect warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the Architect, to solicit or secure this Agreement, and that it has not paid or agreed to pay any company or person, other than a bona fide employee working solely for the Architect, any fee, commission, percentage, brokerage fee, gift, or any other consideration contingent on or resulting from the award or making of this Agreement. For breach or violation of this warranty, the District shall have the right to annul this Agreement without liability, or in its discretion, to deduct from the contract price or consideration or to recover the full amount of such fee, commission, percentage fee, gift, or contingency.

**Article 16. Entire Agreement/Modification**

This Agreement, including the Exhibits hereto, supersedes all previous contracts and constitutes the entire understanding of the Parties hereto. Architect shall be entitled to no other benefits than those specified herein. No changes, amendments or alterations shall be effective unless in writing and signed by both Parties. Architect specifically acknowledges that in entering this Agreement, Architect relies solely upon the provisions contained in this Agreement and no others.

**Article 17. Non-Assignment Of Agreement**

In as much as this Agreement is intended to secure the specialized Services of the Architect, Architect may not assign, transfer, delegate or sublet any interest therein without the prior written consent of District and any such assignment, transfer, delegation or sublease without the District's prior written consent shall be considered null and void. Likewise, District may not assign, transfer, delegate or sublet any interest therein without the prior written consent of Architect and any such assignment, transfer, delegation or sublease without Architect's prior written consent shall be considered null and void.

**Article 18. Law, Venue**

- 18.1. This Agreement has been executed and delivered in the State of California and the validity, enforceability and interpretation of any of the clauses of this Agreement shall be determined and governed by the laws of the State of California.
- 18.2. To the fullest extent permitted by California law, the county in which the District administration office is located shall be the venue for any action or proceeding that may be brought or arise out of, in connection

with or by reason of this Agreement.

**Article 19. Alternative Dispute Resolution**

All claims, disputes or controversies arising out of, or in relation to the interpretation, application or enforcement of this Agreement may be decided through mediation as the first method of resolution. If this method proves unsuccessful, then all claims, disputes or controversies as stated above may be decided through arbitration, if agreed to by all Parties.

**Article 20. Severability**

If any term, covenant, condition or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remainder of the provisions hereof shall remain in full force and effect and shall in no way be affected, impaired or invalidated thereby.

**Article 21. Employment Status**

- 21.1. Architect shall, during the entire term of Agreement, be construed to be an independent contractor and nothing in this Agreement is intended nor shall be construed to create an employer-employee relationship, a joint venture relationship, or to allow District to exercise discretion or control over the professional manner in which the Architect performs the Services which are the subject matter of this Agreement; provided always, however, that the Services to be provided by Architect shall be provided in a manner consistent with all applicable standards and regulations governing such Services.
- 21.2. Architect understands and agrees that the Architect's personnel are not and will not be eligible for membership in or any benefits from any District group plan for hospital, surgical or medical insurance or for membership in any District retirement program or for paid vacation, paid sick leave or other leave, with or without pay or for other benefits which accrue to a District employee.
- 21.3. Should District, in its discretion, or a relevant taxing authority such as the Internal Revenue Service or the State Employment Development Department, or both, determine that Architect is an employee for purposes of collection of any employment taxes, the amounts payable under this Agreement shall be reduced by amounts equal to both the employee and employer portions of the tax due (and offsetting any credits for amounts already paid by Architect which can be applied against this liability). District shall then forward those amounts to the relevant taxing authority.
- 21.4. Should a relevant taxing authority determine a liability for past services performed by Architect for District, upon notification of such fact by District, Architect shall promptly remit such amount due or arrange with District to have the amount due withheld from future payments to Architect under this Agreement (again, offsetting any

amounts already paid by Architect which can be applied as a credit against such liability).

- 21.5. A determination of employment status pursuant to the preceding two paragraphs shall be solely for the purposes of the particular tax in question, and for all other purposes of this Agreement, Architect shall not be considered an employee of District. Notwithstanding the foregoing, should any court, arbitrator, or administrative authority determine that Architect is an employee for any other purpose, then Architect agrees to a reduction in District's liability resulting from this Agreement pursuant to principles similar to those stated in the foregoing paragraphs so that the total expenses of District under this Agreement shall not be greater than they would have been had the court, arbitrator, or administrative authority determined that Architect was not an employee.
- 21.6. Nothing in this Agreement shall operate to confer rights or benefits on persons or entities not a party to this Agreement.

#### **Article 22. Certificate Of Architect**

- 22.1. Architect certifies that the Architect is properly certified or licensed under the laws and regulations of the State of California to provide the professional Services that it has herein agreed to perform.
- 22.2. Architect certifies that it is aware of the provisions of the California Labor Code that 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 it certifies that it will comply with those provisions before commencing the performance of the Services of this Agreement.
- 22.3. Architect certifies that it is aware of the provisions of California Labor Code that require the payment of prevailing wage rates and the performance of other requirements on certain "public works" and "maintenance" projects ("Prevailing Wage Laws"). Since the Architect is performing Services as part of an applicable "public works" or "maintenance" project, and since the total compensation is \$1,000 or more, the Architect agrees to fully comply with and to require its consultant(s) to fully comply with all applicable prevailing wage requirements of the California Labor Code.

#### **Article 23. Cost Disclosure - Documents And Written Reports**

Architect shall be responsible for compliance with California Government Code section 7550, if the total cost of the Contract is over five thousand dollars (\$5,000).

#### **Article 24. Notice & Communications**

Notices and communications between the Parties to this Agreement may be

sent to the following addresses:

**District:**

Oakland Unified School District  
Facilities Department  
955 High Street  
Oakland, CA 94601  
ATTN: Tadashi Nakadegawa

**Architect:**

Dara A. Youngdale  
HKIT Architects  
538 Ninth Street, Suite 240  
Oakland, CA 94607  
ATTN: Dara A. Youngdale

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

**Article 25. Disabled Veteran Business Enterprise Participation**

Pursuant to section 17076.11 of the Education Code, the District has a participation goal for disabled veteran business enterprises (DVBEs) of at least three (3) percent, per year, of funds expended each year by the District on projects that use funds allocated by the State Allocation Board pursuant to the Leroy F. Greene School Facilities Act (the Act). This Project may use funds allocated under the Act. Therefore, to the extent feasible and pertaining to future hirings, the Architect, before it executes the Agreement, shall provide to the District certification of compliance with the procedures for implementation of DVBE contracting goals, appropriate documentation identifying the amount(s) intended to be paid to DVBEs in conjunction with the contract, and documentation demonstrating the Architect's good faith efforts to meet these goals.

**Article 26. District's Right to Audit**

- 26.1. District retains the right to review and audit, and the reasonable right of access to Architect's and any sub-consultant's premises to review and audit the Architect's compliance with the provisions of this Agreement ("District's Right"). The District's Right includes the right to inspect, photocopy, and to retain copies, outside of the Architect's premises, of any and all Project-related records and other information with appropriate safeguards, if such retention is deemed necessary by the District in its sole discretion. The District shall keep this information confidential, as allowed by applicable law.
- 26.2. The District's Right includes the right to examine any and all books, records, documents and any other evidence of procedures and practices that the District determines are necessary to discover and verify that the Architect is in compliance with all requirements of this Agreement.
- 26.3. If there is a claim for additional compensation or for Extra Services, the District's Right includes the right to examine books, records,

documents, and any and all other evidence and accounting procedures and practices that the District determines are necessary to discover and verify all direct and indirect costs, of whatever nature, which are claimed to have been incurred, or anticipated to be incurred.

- 26.4. The Architect shall maintain complete and accurate records in accordance with generally accepted accounting practices in the industry. The Architect shall make available to the District for review and audit, all Project related accounting records and documents, and any other financial data. Upon District's request, the Architect shall submit exact duplicates of originals of all requested records to the District.
- 26.5. The Architect shall include audit provisions in any and all of its subcontracts, and shall ensure that these sections are binding upon all subconsultants.
- 26.6. Architect shall comply with these provisions within fifteen (15) days of the District's written request to review and audit any or all of Architect's Project-related records and information.

#### **Article 27. Other Provisions**

- 27.1. The Architect shall be responsible for the cost of construction change orders caused directly by the Architect's willful misconduct or negligent acts, errors or omissions. Without limiting Architect's liability for indirect cost impacts, the direct costs for which the Architect shall be liable shall equal the difference between the cost of the change order and the reasonable cost of the work had that work been a part of the originally prepared construction documents. These amounts shall be paid by Architect to District or the District may withhold those costs from amounts owing to Architect.
- 27.2. Neither the District's review, approval of, nor payment for, any of the Services required under this Agreement shall be construed to operate as a waiver of any rights under this Agreement, and Architect shall remain liable to the District in accordance with this Agreement for all damages to the District caused by Architect's failure to perform any of the Services furnished under this Agreement to the standard of care of the Architect for its Services, which shall be, at a minimum, the standard of care of architects performing similar work for California school districts in or around the same geographic area of the District.
- 27.3. Each party warrants that it has had the opportunity to consult counsel and understands the terms of this Agreement and the consequences of executing it. In addition, each party acknowledges that the drafting of this Agreement was the product of negotiation, that no party is the author of this Agreement, and that this Agreement shall not be construed against any party as the drafter of the Agreement.

**Article 28.** Exhibits A through E attached hereto are hereby incorporated by this reference and made a part of this Agreement.

**Article 29. Roofing Certification (If Applicable)**


Architect shall execute the Roofing Certification attached hereto as **Exhibit "F"** for Services containing a roof repair or replacement project. Architect shall submit the Roofing Certification to the District prior to the time Services are engaged.

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>

*Muri Brater Kelly 2-7-2014*

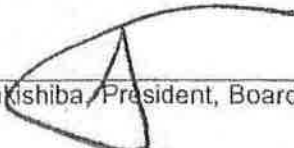
ACCEPTED AND AGREED on the date indicated below:

ARCHITECT

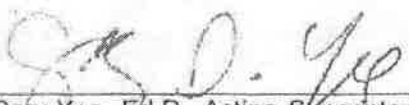
By:   
Its: President

1/30/14  
Date

OAKLAND UNIFIED SCHOOL DISTRICT

  
David Kakishiba, President, Board of Education

2/27/14  
Date

  
Dr. Gary Yee, Ed.D., Acting Superintendent  
and Secretary, Board of Education

2/27/14  
Date


Timothy E. White, Associate Superintendent, Facilities,  
Planning and Management

                      
Date

APPROVED AS TO FORM:

  
Cate Boskoff, Facilities Legal Counsel

2/5/14  
Date

File ID Number: 14-0306  
Introduction Date: 2-26-14  
Enactment Number: 14-0306  
Enactment Date: 2-26-14  
By: 



**Exhibit A**

## **EXHIBIT "A"**

### **RESPONSIBILITIES AND SERVICES OF ARCHITECT**

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

- **SCOPE OF PROJECT**

The scope of the project is to provide design services, structural engineering, mechanical/electrical/plumbing engineering, photovoltaic, civil engineering, landscape design, fire alarm / intrusion alarm design, food services and cost estimating services. Services also include program and conceptual design verification and refinement, full design development and documentation; the Division of State Architect approval process, construction administration and closeout services in addition to daylight modeling and energy use modeling.

- **BASIC SERVICES**

Architect agrees to provide the services described below:

1. Architect shall be responsible for the professional quality and technical accuracy of all studies, reports, projections, master plans, designs, drawings, specifications and other services, including Collaborative for High Performance Schools (CHPS) program registration and compliance per OUSD/CHPS guidelines, DSA/OPSC High Performance Incentive (HPI) Grant Program submission, if eligible, and PG&E's Savings By Design rebate incentive program, as applicable, furnished by Architect under the Agreement as well as coordination with all Master plans, studies, reports and other information provided by District. Architect shall, without additional compensation, correct or revise any errors or omissions in its studies, reports, projections, master plans, design, drawings, specifications and other services.
2. The District shall provide all information available to it to the extent the information relates to Architect's scope of work. This information shall include, if available,
  - a. Physical characteristics,
  - b. Legal limitations and utility locations for the Project site(s),
  - c. Written legal description(s) of the Project site(s),
  - d. Grades and lines of streets, alleys, pavements, and adjoining property and structures;
  - e. Adjacent drainage;
  - f. Rights-of-way, restrictions, easements, encroachments, zoning, deed restrictions, and boundaries and contours of the Project site(s);
  - g. Locations, dimensions and necessary data with respect to existing buildings, other improvements and trees;
  - h. Information concerning available utility services and lines, mechanical and other services, both public and private, above and below grade, including inverts and

depths;

- i. Surveys, reports, as-built drawings, record drawings; and
- j. Subsoil data, chemical data, and other data logs of borings.

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

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

- a. In the event that the Architect provides site information and documentation as an Additional Service to the contract, then Architect shall be fully responsible for the accuracy and quality of site documentation including site survey data, utility information, and all aspects site conditions as confirmed by the Architect.

3. **Technology Backbone.** Architect shall be responsible for the coordination of the design and the layout of the technology backbone system with the District's technology department, and lay out any included technology backbone system. Architect shall coordinate the design and layout of the Project improvements to include the integration of the District's Wide Area Network ("WAN"), also known as the Gigaman network. The coordination effort shall include location and routing of raceways, conduits and outlets and the required spaces to accommodate electrical, data and communication wiring, from the utility provider network to the school, and the entire Local Area Network within the school. Architect and consultant(s) shall prepare and be responsible for documents prepared by the Architect based on the information provided by the District's technology consultant as appropriate to the level of design completion.
4. **Interior Design.** Provide interior design and other similar services required for or in connection with selection and color coordination of materials. Architect is required to coordinate the placement of furniture, equipment layout, or schematic space allocation. The District shall procure furnishings and moveable equipment. Advise the District on lead times and availability of all specified Project equipment, materials, supplies, and furnishings to verify that all of these will be available to the District in a timely fashion so as to not delay the Project and/or delay the District's beneficial occupancy of the Project.
5. **District Standards.** District Standards. Architect shall incorporate in to its work and the work of all consultants the adopted District Standards for facilities and

construction including, but not limited to, OUSD/CHPS Guidelines, Including Owner's Project Requirements and District Standards as Adopted by the Board of Education in Resolution 0607-0158. **Failure by Architect to incorporate Oakland Unified School District Standards as updated to latest OUSD CHPS Guidelines into its work and the work of all Architect sub consultants is deemed to be a material breach of this Agreement.**

**6. Mandatory Assistance**

If a third party dispute or litigation, or both, arises out of, or relates in any way to the Services provided under this Agreement, upon the District's request, and excepting any conflicts at interest, the Architect, its agents, officers, and employees agree to assist in resolving the dispute or litigation. The Architect's assistance includes, but is not limited to, providing professional consultations, attending mediations, arbitrations, depositions, trials or any event related to the dispute resolution and/or litigation ("Mandatory Assistance")

☐ **CHPS VERIFIED PLUS HPI INCENTIVE WITH OPSC ELIGIBILITY TRACK**

**7. Collaborative for High Performance Schools ("CHPS") Criteria, CHPS Verified Program and State of California High Performance Schools Incentive (HPI) Grant Program.** As part of Basic Services, the Architect shall adhere to the District's OUSD CHPS Guidelines, and Owner's Project Requirements (OPR) based on incorporating required and voluntary design Criteria of the Collaborative for High Performance Schools ("CHPS")—2009 Criteria (or latest version per OUSD CHPS Guidelines), into the project. As a part of Basic Services the Architect shall complete all documentation and submission requirements necessary for the State of California High Performance Schools Incentive (HPI) Grant Program as eligible as well as the CHPS Verified Program. The Architect shall work with the District and its CHPS Program Manager to confirm CHPS and DSA/OPSC HPI review path with OUSD as CHPS and HPI Programs develops, and verify that the District's project meets the highest possible point score under CHPS Criteria and to maximize HPI grant funding, consistent with the District's budget.

a. The Architect and Subconsultants shall participate early on in two CHPS integrated design workshops, led by the District's CHPS Program Manager to establish OUSD CHPS Guideline goals and identify target credits. The Architect shall be responsible for Registering the project on-line with the CHPS Verified Program, and submitting for design and construction verification according to CHPS Verified Program Guidelines. The Architect shall update the CHPS "Scorecard" and the DSA HPI Scorecard, OR the "Joint CHPS Verified/HPI scorecard," as available, with credit documentation, concurrent with each design phase submittal. The status of project compliance and documentation submitted in relation to CHPS Verified and HPI credits shall be assessed with the District at the end of each phase of the work.

b. Whole building energy performance analysis with goal of 30% < CA Title 24 minimum energy performance standard shall be performed at least once during each the following phases: Schematic Design, Design Development, and Construction Documentation. Energy Conservation Measures (ECMs) shall be proposed with Schematic and Design Development energy analysis runs to improve performance to meet or exceed goal. Daylighting analysis to identify strategies to improve daylighting to maximize goals of CHPS Credit EQ 1.1 'Daylighting,' shall also be performed at Schematic, and Design Development Phases prior to final Construction Documentation phase analysis reflecting final design incorporating daylighting

improvements identified in earlier phases.

c. The Architect shall assist the District in a timely manner, in preparing applications to the Division of State Architect and Office of Public School Construction which shall meet DSA/HPI submission requirements, including calculations demonstrating Acoustic Performance standards per OUSD/CHPS guidelines are met, and all required documentation required to meet CHPS Verified rating and receive funding under the DSA/OPSC High Performance Schools Incentive Grant Program. Final approved HPI, or Joint CHPS Verified/HPI, scorecard indicating points verified, and DSA HPI-1 forms shall be forwarded by the Architect upon receipt to the District's Project Manager and OUSD CHPS Program Manager.

☒ **CHPS VERIFIED ONLY/ NO OPSC HPI ELIGIBILITY TRACK**

**7. Collaborative for High Performance Schools ("CHPS") Criteria, CHPS Verified Program** As part of Basic Services, the Architect shall adhere to the District's OUSD CHPS Guidelines, and Owner's Project Requirements (OPR) based on Incorporating required and voluntary design Criteria of the Collaborative for High Performance Schools ("CHPS")—2009 Criteria (or latest version per OUSD CHPS Guidelines,), into the project. As a part of Basic Services the Architect shall complete all documentation and submission requirements necessary for Registration and Design and Construction Submissions of the CHPS Verified Program. The Architect shall work with the District and OUSD CHPS Program Manager to confirm CHPS Verified review path and verify that the District's project meets the Owner's Project Requirements and OUSD CHPS Guideline goals for a CHPS Verified school project consistent with the District's budget.

a. The Architect and Subconsultants shall participate early on in two CHPS Integrated design workshops, led by the District's CHPS Program Manager to establish OUSD CHPS Guideline goals and identify target credits. The Architect shall be responsible for Registering the project on-line with the CHPS Verified Program, and submitting for Design and Construction verification according to CHPS Verified Program Guidelines. „ The Architect shall update the CHPS "Scorecard" with credit documentation, concurrent with each design phase submittal. The status of project compliance and documentation submitted in relation to CHPS Verified credits shall be assessed with the District at the end of each phase of the work.

b. Whole building energy performance analysis with goal of 30% < CA Title 24 minimum energy performance standard shall be performed at least once during the following phases: Schematic Design, Design Development, and Construction Documentation. Energy Conservation Measures (ECMs) shall be proposed with Schematic and Design Development energy analysis runs to improve performance to meet or exceed goal. Daylighting analysis to identify strategies to improve daylighting to maximize goals of CHPS Credit EQ 1.1 'Daylighting,' shall also be performed at Schematic, and Design Development Phases prior to final Construction Documentation phase analysis reflecting final design incorporating daylighting improvements identified in earlier phases.

c. The Architect shall complete steps as required by the CHPS Verified Program to achieve a CHPS Verified school project, including calculations demonstrating Acoustic Performance standards per OUSD/CHPS guidelines are met, and forward electronic pdf copies of all submissions and communications with CHPS, concurrently, to the District's Project Manager and OUSD CHPS Program Manager.

☐ CHPS DESIGNED ONLY/ OUSD CHPS GUIDELINES / MINOR MODERNIZATION  
SCOPE ONLY/ NO OPSC HPI ELIGIBILITY TRACK

**7. Collaborative for High Performance Schools ("CHPS") Criteria, and OUSD CHPS Guidelines** As part of Basic Services, the Architect shall adhere to the District's OUSD CHPS Guidelines, and Owner's Project Requirements (OPR, based on incorporating required and voluntary design Criteria of the Collaborative for High Performance Schools ("CHPS")—2009 Criteria (or latest version per OUSD CHPS Guidelines,)), into the project. As a part of Basic Services the Architect shall complete all documentation and submission requirements necessary to self-certify the school project as 'CHPS Designed' according to the CHPS Designed Program and transmit the documentation to the District for its potential future submission to the CHPS Verified Program. The Architect shall work with the District and OUSD CHPS Program Manager to verify that the District's project meets the Owner's Project Requirements and OUSD CHPS Guideline goals for a CHPS Verified school project consistent with the District's budget.

a. The Architect and Subconsultants shall participate early on in two CHPS integrated design workshops, led by the District's CHPS Program Manager to establish OUSD CHPS Guideline goals and identify target credits. The Architect shall update the CHPS "Scorecard" with credit documentation to the extent applicable to scope, concurrent with each design phase submittal. The status of project compliance and any documentation submitted in relation to CHPS Designed credits shall be assessed with the District at the end of each phase of the work.

b. Whole building energy performance analysis with goal of 30% < CA Title 24 minimum energy performance standard shall be performed at least once during the following phases: Schematic Design, Design Development, and Construction Documentation. Energy Conservation Measures (ECMs) shall be proposed with Schematic and Design Development energy analysis runs to improve performance to meet or exceed goal. Daylighting analysis, as applicable to scope of work, to identify strategies to improve daylighting to maximize goals of CHPS Credit EQ 1.1. 'Daylighting,' shall also be performed at Schematic, Design Development, and Construction Documentation phases.

c. The Architect shall complete and transmit the CHPS Designed Scorecard, including calculations demonstrating Acoustic Performance standards per OUSD/CHPS guidelines are met, and any documentation to the District in electronic format suitable for combination with a subsequent project(s) for potential future submission to the CHPS Verified Program to the District's Project Manager and OUSD CHPS Program Manager.

**8. Alternates.** As part of Basic Services, Architect shall design the Project to include alternates, either deductive or additive, in an amount equal to 10% of the budget for the Project. These alternates shall be identified in the Design Development Phase.

**9. Coordination with Local, State, Federal Agencies.** The Architect shall coordinate and assist in the preparation of all necessary documents and studies as required by the State Allocation Board ("SAB"), Office of Public School Construction ("OPSC"), Division of State Architect (DSA), California Department of Education ("CDE") and other local, state and federal agencies. The Architect shall also coordinate and assist the District in qualifying for utility rebates and funding including, but not limited to, energy rebates and applications to PG&E's Savings By

Design program for all new buildings. The District shall be copied on all such documentation, correspondence and communications with utilities, local, state and federal agencies. The Architect shall also coordinate and assist the District in obtaining required approvals from various public agencies and utility companies including, but not limited to, Department of Public Health, services from electric, gas, water, stormwater control or sanitary sewer, and telephone and cable TV public utilities. The Architect shall coordinate all local, state and federal agency requirements specific to the Project.

10. **Utility Services Verification.** The Architect shall prepare the documentation required to make points of connection to existing utility services provided by the public utilities. The Architect shall verify the capacity of existing utilities, or for any design or documentation required to make points of connection to existing utility services required for the Project, as well as verify all existing electric, gas, and water meter numbers and locations on site for coordination with the District's Portfolio Manager benchmarking efforts. Location and actual meter number(s) of any new meters installed with this scope of work shall be recorded on an 8 1/2 "x. 11" site plan of the project site and submitted to the District upon completion of meter installations.

• **PRE-DESIGN AND START-UP SERVICES**

1. **Project Initiation**

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

- a. Within the first week following execution of the Agreement, review the proposed Schedule of Work set forth in Exhibit "C" to the Agreement and prepare a detailed scope of work list and work plan for documentation in a computer-generated Project schedule to the District's satisfaction. This scope of work list and work plan will identify specific tasks including, but not limited to: interviews, data collection, analysis, report preparation, planning, architectural programming, concepts, CHPS workshops with CHPS, and DSA/OPSC HPI, OR "Joint CHPS/HPI" (as applicable) Scorecards and credit documentation, and schematic design preparation and estimating that are part of the work of the Project. Architect shall also identify milestone activities or dates, specific task responsibilities, required completion times necessary for the review and approval by the District and by all reviewing or regulatory agencies and additional definition of deliverables.
- b. Review the developed work plan with the District and its representatives to familiarize them with the proposed tasks and schedule and develop necessary modifications.
- c. Perform pre-design investigations to establish appropriate guidelines around which and within which the Project is to be designed. Identify design issues relating to functional needs, directives and constraints imposed by regulatory codes. Review all data pertinent to the Project including survey, site maps, geotechnical reports and recommendations, soil testing results reports, and pertinent historical data, and other relevant information provided by District.

- d. Review applicable codes, building standards and Owner's Project Requirements (OPR) pertaining to the proposed Project design.
- e. Identify design issues relating to functional needs, directives, and OPR that may be affected by constraints imposed by applicable regulatory codes, or standards, and communicate any issues in writing.
- f. Based on survey and topography data provided by the District, develop existing conditions base and a site analysis plan for the Schematic Design Phase.
- g. Administer Project as required to coordinate work with the District and between subconsultants. Submit a Basis of Design, with primary input from MEP subconsultants in response to Owner's Project Requirements provided by the District.

## 2. Meetings

During this Phase, Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops to develop the Architectural Program with construction Cost Budget, and as indicated below.

- a. Participate in initial CHPS workshop facilitated by District CHPS Program Manager to develop preliminary CHPS/HPI scorecard(s) and review Owner's Project Requirements.
- b. Conduct meeting with OUSD Buildings and Ground and Custodial/Maintenance staff as well as District Facilities Project Manager and Site Principal to review Basis of Design and approach to building systems, and operations.

## 3. Construction Cost Budget

- (I) Architect shall have responsibility to further review the Construction Cost Budget within the parameters of the Construction Budget established in the District's implementation plan. The estimates forming the basis of the Construction Cost Budget are to be prepared by the Program Manager and the Design Phase Manager and are to be based on the developed functional architectural programs as approved by the District. The Architect shall be responsible to review and advise on all elements of the Cost Estimates prepared by the District's management team. The following conditions apply to the Construction Cost Budget reviewed by the Architect:
  - (A) All costs are to be based on current bid prices, with escalation rate and duration clearly identified as a separate line item; rate of cost escalation and projected bid and construction dates are to be as approved by the District and its representatives.
  - (B) Format shall be in a building systems format (e.g., foundations, substructure, structural system, exterior wall enclosure, window systems, etc.) for new buildings,



and summarized by the Construction Specification Institute (CSI) category for buildings being modernized.

- (C) Contingencies for design, bidding, and construction are to be included as individual line items, with the percentage and base of calculation clearly identified.
- (D) The Architect shall review all information and estimates from the District and/or the Construction Manager that are intended to be part of the Construction Cost Budget.

Prior to beginning each subsequent phase of the work the Architect shall verify in writing that they have reviewed Construction Cost Budget.

- (E) Mechanical, electrical, civil and landscape consultant(s) shall participate in the progress meeting as appropriate and shall provide input and feedback into the development of the Construction Cost Budget.
- (I) The Construction Cost Budget for the Project must at no point exceed the District's Construction Budget for the Project. The accuracy of the Construction Cost Budget shall be the responsibility of the Program Manager and the Design Phase Manager. However, the Architect shall be responsible to provide review, and final acceptance of the Construction Cost Budget as the basis for continuing the proposed project design.

#### **4. Presentation**

Architect along with any involved consultant(s) shall present and review with the District and, if directed, with it's the District's governing board, the summary and detail of work involved in this Phase, including two dimensional renderings of any proposed facility suitable for public presentation with preliminary CHPS Scorecard.

#### **5. Deliverables and Numbers of Copies**

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

- a. Two copies of Architectural Program (Include comparison between developed program and "model" program, include narrative explaining any substantial deviations);
- b. Two copies of Site Analysis Plan with Two copies of Conceptual Site Plan;
- c. Two copies of Architect's concurrence with the revised Construction Cost Budget;
- d. Two copies of final Schedule of Work;

- e. Two copies of meeting Reports/Minutes from Kick-off and other meetings/workshops;
- f. .Two copies of Basis of Design
- g. Two copies of preliminary CHPS/HPI scorecard(s).

## **SCHEMATIC DESIGN PHASE**

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

1. Prepare and review with District staff a scope of work list and work plan identifying specific tasks including, but not limited to: interviews, data collection, analysis, report preparation, planning, architectural programming, concepts CHPS/HPI scorecard with design credit documentation updates and schematic design preparation and estimating that are part of the work of the Project. Also identified will be milestone activities or dates, specific task responsibilities of the Architect, required completion times necessary for the review and approval by the District and by pertinent regulatory agencies and additional definition of deliverables.
2. Review the developed work plan with the District and its representatives to familiarize them with the proposed tasks and schedule and develop necessary modifications.
3. Confirm with the District and with approving agencies, including DSA, the overall packaging of the Project into increments or phases which will provide a complete project, including definition of HPI incentive grant eligible portion(s), as applicable.
  - a. Identify each of the Project increments and prepare a package of documents which is complete and coordinated with the overall project and all increments of the work which make up the complete project.
  - b. For each increment of the work the following requirements shall apply, similarly at each subsequent phase of the Architect's service.
4. **Architectural**
  - a. Scaled floor plans showing overall dimensions, identifying the various major areas and their relationship. Include circulation and room-by-room tabulation of all net usable floor areas and a summary of gross floor area. Also, provide typical layouts of major equipment or operational layout.
  - b. Preliminary building exterior elevations and sections in sufficient detail to demonstrate design concept indicating location orientation, type, and size of fenestration.
  - c. As applicable, identify proposed roof system, deck, building envelope insulation system with R-values and drainage technique.
  - d. Identify minimum finish requirements, including ceiling, floors, walls, doors, windows, and types of hardware.
  - e. Identify code requirements, including identification of CALgreen mandatory and voluntary compliance, with occupancy classification(s) and type of construction.

- f. Update CHPS/HPI scorecard and credit documentation to reflect Schematic Design

**5. Structural**

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

**6. Mechanical/Plumbing**

- a. Calculate block heating, ventilation, and cooling loads including skin versus internal loading.
- b. Select a minimum of two (2) low energy design approaches to HVAC systems that appear compatible with loading conditions and that meet the OPR for subsequent life cycle costing.
- c. Show selected system on drawings as follows:
  - (i) Single line drawing(s) of all mechanical equipment spaces, ductwork and pipe chases.
  - (ii) Location and preliminary sizing and efficiency of all major equipment and any duct work in allocated spaces.
  - (iii) Schematic piping.
  - (iv) Temperature control zoning and ventilation controls
- d. Provide systems design narratives outlining specific criteria or approach to meet Basis of Design for the projects.

**7. Food Service.**

- a. Provide as a part of Basic Services, preliminary designs for any Cafeteria and Food Service Kitchens, Warming Kitchens, service areas, and student/faculty serving lines.
  - (i) Coordinate work with the District's Food Services standards, identify Energy Star rated appliances/equipment, and meet with District staff to review preliminary designs and equipment.
  - (ii) Coordinate Food Services systems with Mechanical, Plumbing, and Electrical divisions.

**8. Electrical**

- a. Calculate overall approximate electrical loads.

- b. Identify proposed electrical system for service, power, lighting, low voltage and communication loads, including proposed or planned additional buildings or other facilities on the Project site.
  - (I) WAN and LAN preliminary design to indicate coordination with network utility, site routing, sizes and locations of MDF space and Individual building or floor IDF locations, proposed in-building routing approaches, preliminary room LAN components, including computer locations, presentation technology elements, Centralized Voice System components.
- c. Show system(s) selected on drawings as follows:
  - (I) Single line drawing(s) showing major distribution system.
  - (ii) Location and preliminary sizing of all major electrical systems and components including:
    - (A) Load centers.
    - (B) Main panels.
    - (C) Switch gear.
- d. Provide any systems design narratives updates outlining specific criteria or approach to meet Basis of Design for the projects.

9. **Civil**

- a. Develop on and off Site utility systems such as sewer, domestic water system, stormwater management, storm drain, fire water lines and fire hydrants. Layout all proposed systems indicating all electric, gas, and water meters, tie-ins with existing on and off-site utilities. Provide the District with options for routing major utility systems, present options with anticipated costs and benefits to each of the proposed routes and system types.
  - (i) Meet with local Fire officials in the development of a preliminary Fire Access route on the site of the project and in the development of approved locations for on-site fire hydrants, Fire Dept connections, and fire water service routing and components.
- b. Coordinate the Schematic Civil work of the project with each of the major Utility service providers. Schedule and attend a preliminary design meeting with each provider, which shall include but not be limited to:
  - (I) PG&E
  - (ii) EBMUD
  - (iii) SBC
  - (iv) Comcast
  - (v) Local Sanitary District
  - (vi) Municipal Utility Systems.

- c. Identify surface improvements including roadways, walkways, bike lanes, parking (with assumed wheel weights), preliminary finish grades and drainage.
  - (i) Coordinate the work of the site development plans for the project with the District's Traffic Engineering Consultant.
- d. Coordinate finish floor elevations with architectural site plan.
- e. Develop and coordinate Stormwater Management Plan to meet compliance with local/county Water Resources Control Board and OUSD CHPS Guidelines.

**10. Landscape**

Develop and coordinate landscape design concepts, and entailing analysis of existing conditions, proposed components and how the occupants will use the facility. Include location and description of planting, ground improvements, stormwater management features, permeable and non-permeable paving, shade trees, and visual barriers.

**11. Specifications**

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

**12. Construction Cost Budget**

In coordination with the Program Manager and the Design Phase Manager update the Construction Cost Budget for the Project. Along with the conditions identified in the preceding Phase, the following conditions apply to the revised Construction Cost Budget:

- a. Schematic Estimates: This estimate consists of unit cost applied to the major items and quantities of work. The unit cost shall reflect the complete direct current cost of work. Complete cost includes labor, material, waste allowance, sales tax and subcontractor's mark-up.
  - (i) General conditions shall be applied separately. This estimate shall be prepared by specification section and summarized by the CSI categories.
- b. The estimate shall separate the Project's building cost from site and utilities cost.

- c. Escalation: all estimates shall be priced out at current market conditions. The estimates shall incorporate all adjustments as appropriate, relating to mid-point construction, contingency, and cost index (i.e. Lee Saylor Index).
- d. The Construction Cost Budget for the Project must at no point exceed the District's Construction Budget for the Project. The accuracy of the Construction Cost Budget shall be the responsibility of the Program Manager and the Design Phase Manager. The Architect shall participate in Estimate review and shall accept the Construction Cost Budget as reflected in the Cost Estimate updates at this and each phase.
- e. The Architect shall coordinate with the District's Program Manager and Design Phase Manager to further develop, review, and reconcile the Construction Cost Budget.
- f. At the end of this Phase, the Construction Cost Budget may include design contingencies of no more than ten percent (10%) in the cost estimates.

### **13. Meetings**

During this Phase, Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as required to complete the work of this phase of the project, and specifically as indicated below.

- a. Community or Neighborhood review meeting conducted by the District with a complete presentation of the project.
- b. CHPS Integrated design workshop
- c. Board of Education public meeting presentation.
- d. City Council or other local agency presentation.

### **14. Deliverables and Numbers of Copies**

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

- (2) Confirmation of Construction Cost Budget as prepared for this Phase;
- (2) Meeting Reports/Minutes;
- (2) Schematic Design Package with alternatives as may be required to consider all appropriate project options.
- (2) A statement indicating changes made to the Architectural Program and Schedule.

- (3) CHPS/HPI scorecard with documentation for Design Credits, including preliminary Daylighting analysis documentation for CHPS credit EQ 1.1 updated to reflect Schematic Design
- (4) Preliminary T24 whole building energy analysis reflecting Schematic Design plus list of Energy Conservation Measures (ECMs) with initial cost and projected cost savings and payback period.

DSA file, including all correspondence and meeting notes to date, or notification in writing that Architect has not met or corresponded with DSA,

- (1) Complete Schematic Design Color Presentation Package including PowerPoint presentation and mounted glossy boards with Site Plan, Floor Plans, Elevations, and any other drawings to fully indicate the project schematic design, indicating high performance school design features.

**15. Presentation**

- a. Architect shall present and review with the District the detailed Schematic Design and CHPS documentation.
- b. The Schematic Design shall be revised within the accepted program parameters until a final concept within the accepted Construction Cost Budget has been accepted and approved by the District at no additional cost to the District.
- c. The Architect shall meet with the Principal and the Site Committee of the school and shall attain the Principal's signature of approval of the design on one set of drawings including CHPS/HPI scorecard prepared by Architect.
- d. Prior to approval of the project Schematic Design, the Architect shall meet with the District and make presentations to the District's Superintendent and Board of Education of the project schematic design with intended CHPS targets.
  - (i) Where the Superintendent or the Board request reasonable changes to the project the Architect shall incorporate such changes as a part of Basic Services and prior to advancing to the next phase of work.



• **DESIGN DEVELOPMENT PHASE**

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

2. **Architectural**

- a. Demolition Plans. Where the project includes renovation of existing buildings Demolition Plans shall have a preliminary level of definition including general descriptions of areas of the buildings to be demolished, salvaged, and/or recycled for re-use as a part of the work.
- b. Scaled, dimensioned floor plans with final room locations including all openings.
- c. 1/8" scale building sections showing dimensional relationships, materials and component relationships.
- d. Exterior Elevations of all proposed new buildings, existing buildings to be renovated and all architectural elements of the project.
- e. Identification of all fixed equipment, cabinets, shelves, casework to be installed in contract.
- f. Interior Finishes Identified and located within the rooms of all buildings.
- g. Site plan completely drawn with beginning notes and dimensions including grading and paving.
- h. Preliminary development of details and large scale blow-ups.
- i. Legend showing all symbols used on drawings.
- j. Floor plans identifying all fixed and major movable equipment and furniture.
- k. Further refinement of Specifications for architectural, structural, mechanical, electrical, civil and landscape manuals, systems and equipment.
- l. Typical reflected ceiling development including ceiling grid and heights for each ceiling to be used, showing:
  - (i) Light fixtures,
  - (ii) Ceiling registers or diffusers.

(iii) Access Panels.

- m. Update CHPS/HPI scorecard and credit documentation to reflect Design Development
- n. Response to Commissioning Agent comments on current Design

**3. Structural:**

- a. Developed structural drawings with all foundation elements, and structural major members and elements defined, located and sized.
- b. Establish final building and floor elevations.
- c. Preliminary specifications.
- d. Preliminary calculations for the structural systems including lateral force resistive systems, foundations, and all structural system components.
- e. Identify foundation requirement (including fill requirement, piles) with associated soil pressure, water table and seismic design criteria.

**4. Mechanical**

- a. Heating and cooling load calculations as required and major duct or pipe runs sized to interface with structural.
- b. Major mechanical equipment should be scheduled indicating size and capacity.
- c. Ductwork and piping should be substantially located and sized.
- d. Plumbing Plans for project shall indicate numbers and locations of fixtures and be in conformance with the code-mandated fixture count requirements of the project.
- e. Devices in ceiling should be located.
- f. Legend showing all symbols used on drawings.
- g. More developed Outline Specifications indicating quality level and manufacture.
- h. Control Systems to be identified and laid out with requirements for wiring, devices, and system components included in the documents.

**5. Food Service.**

Update and develop preliminary designs for Cafeteria and Food Service Kitchens, Warming Kitchens, service areas, and student/faculty serving lines. Prepare equipment and fixture schedules, indicating Energy Star Appliances. Prepare

developed designs for special systems, finishes, materials, or details required to complete a full package of Food Services work in the project.

- (I) Coordinate work with the District's Food Services standards and meet with District staff to review updated designs and equipment.
- (II) Coordinate Food Services systems with Mechanical, Plumbing, and Electrical divisions.

## 6. Electrical

All lighting fixtures should be located and scheduled showing all types and quantities of fixtures to be used, including proposed lighting levels with photometrics, and clear lighting controls for CHPS/HPS credit EQ 1.3 Electric Lighting documentation meeting OUSD CHPS Guidelines

- a. for each usable space.
- b. All major electrical equipment should be scheduled indicating size and capacity.
- c. Complete electrical distribution including a one line diagram indicating final location of switchboards, communications, controls (high and low voltage), motor control centers, panels, transformers and emergency generators, if required.
- d. Low voltage system designs fully developed including fire alarm system, security system, clock and public address system, voice data system, and telecom/technology system.
- e. WAN and LAN systems developed to indicate network utility connections, sizes and locations of pull/pull boxes, site routing for all underground system components, sizes and locations, and layouts of MDF spaces and individual building or floor IDF locations, proposed in-building routing approaches, confirmed room LAN components, including computer locations, presentation technology elements, Centralized Voice System components. Preliminary material and product specifications completed.
- f. Legend showing all symbols used on drawings.
- g. More developed and detailed Specifications indicating quality level and manufacture for all elements of the Electrical system.

## 7. Civil

- a. Further refinement of Schematic Design Phase development of on and off site utility systems for sewer, electrical, water, stormwater management, storm drain and fire water. Includes, without limitation, pipe sizes, materials, invert elevation location and installation details.

- b. Further refinement of Utility systems designs for on and off-site utility services to the project.
- c. Further refinement of Schematic Design Phase roadways, walkways, bike lanes, parking and storm drainage improvements. Includes details and large scale drawings of curb and gutter, manhole, thrust blocks, paved parking and roadway sections.
- (l) Incorporate final comments and design proposals of the District's Traffic Engineering Consultant into the project documents.

**8. Landscape**

Further refinement of Schematic Design concepts. Includes coordination of hardscape, landscape planting, ground cover stormwater management features, and Irrigation main distribution lines. Selection of site furnishings in accordance with District standards.

**9. Architect Review**

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

**10. Construction Cost Budget**

- a. Working with the Design Phase Manager and the Program Manager, who shall have primary responsibility to prepare Cost Estimates for the Project, review the Construction Cost Budget for the Project. Along with the conditions identified in the Agreement and the preceding Phases, the following conditions apply to the revised Construction Cost Budget for the Design Development Phase:
- b. Design Development Estimate: This further revised estimate shall be prepared by specification section, summarized by CSI category and divided by trade and work item. The estimate shall include individual item unit costs of materials, labor and equipment. Sales tax, contractor's mark-ups, and general conditions shall be listed separately.
- c. The Construction Cost Budget for the Project must at no point exceed the District's Construction Budget for the Project. The accuracy of the Construction Cost Budget shall be the primary responsibility of the Design Phase Manager and the Program Manager. The Architect shall participate in Estimate review and shall accept the Construction Cost Budget as reflected in the Cost Estimate updates at this and each phase. However, if Architect believes that the Design Phase Manager estimates are inaccurate, Architect shall inform the District of such belief. If the Cost Estimate exceeds the District's Construction Budget, Architect shall recommend revisions to bring the design within budget, and/or provide Life Cycle Cost Analysis to demonstrate long-term cost savings for evaluation with District.

- d. At this stage of the design, the Construction Cost Budget may include design contingencies of no more than ten percent (10%) in the cost estimates.

**11. Deliverables and Numbers of Copies**

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

- (2) Design Development drawing set from all professional disciplines necessary to deliver the Project.
- (2) Specifications.
- (2) Updated CHPS/HPI scorecard with documentation for Design Credits, including preliminary Daylighting analysis documentation for CHPS credit EQ 1.1 updated to reflect Design Development.
- (2) Updated T24 whole building energy analysis reflecting Design Development plus list of Energy Conservation Measures (ECMs) incorporated.
- (2) Response to Commissioning agent's comments on current Design
- (2) Architect's agreement with reconciled and revised Construction Cost Budget.
- (2) DSA file, including all correspondence and meeting notes to date, or notification in writing that Architect has not met or corresponded with DSA.

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

**12. Meetings**

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

The Architect shall also meet with the Principal and the Site Committee of the school and shall attain the Principal's signature of approval of the developed design on one set of drawings prepared by Architect.

• **CONSTRUCTION DOCUMENTS PHASE**

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

Construction Documents ("CD") 100% CD's, DSA Submittal Package: Architect shall verify that all of the work of the project as indicated on the construction documents is complete, fully coordinated among the disciplines and meets the requirements of the Division of the State Architect for final submission and plan review of the project.

No separate 50% CD package shall be required for this project. The Architect shall initiate and coordinate an in-house 50% CD review with the District, and Design Phase Managers, including OUSD CHPS Program Manager and Commissioning Agent. This review shall include mandatory attendance by all of the Architect's sub-consultants and each shall present work-in-progress drawings, specifications, tables, calculations, sketches, CHPS and/or HPS Scorecard with all credit documentation, or other material clearly indicating that the work has progressed to the 50% CD phase.

**2. Architectural**

- a. Completed site plan. Site plan developed to show all building and improvement locations, all topographical elements and existing/proposed contour lines.
  - (i) Architectural site plans indicating the project phasing, locations of temporary housing if any, and coordinated fully with Landscape Plans, and Civil Plans.
  - (ii) Demolition Plans. Where the project includes renovation of existing buildings the Construction Documents Demolition Plans shall be fully developed and coordinated among all disciplines of the project to clearly define all areas of demolition, identify any deconstruction and quantify salvaged materials for re-use on or off-site, on the Demolition Plans.
    - (A) Demolition Plans for full buildings, whether a part of the full package or a separate package for Construction shall be complete and fully coordinated indicating:
      - (1) All buildings and site elements to be demolished, deconstructed, salvaged or recycled on -site, and/or recycled or removed;
      - (2) All underground utilities, piping, footings, and other structural or non-structural elements which will impact the work;
    - (B) Demolition Plans. Coordination with District's Hazardous Materials removal plans shall be complete at the end of this phase. Architect shall have reviewed with the District's Consultant all Hazardous Materials surveys and reports and clearly indicated to the Consultant any impacts due to the

demolition of existing building elements required by the project. Architects plans shall reference Hazardous Materials abatement plans and specifications to be incorporated into the Construction Document set.

- (iii) Completed floor plans, elevations, and sections. Elevations (exterior and interior) developed to clearly indicate all work and reference all details, materials, schedules, and special conditions which form the basis of the work, sections and floor plans corrected to reflect design development review comments.
  - (A) Floor plans, elevations and sections coordinated referencing all relevant details of the work.
  - (B) Floor plans, elevations, and sections developed to incorporate plan review comments by the District, cost estimators, and Constructability Reviewers.
- (iv) Architectural details and enlarged plans and details fully completed to indicate the detailed relationships of the elements of the work, materials, construction sequences, structural requirements, finish elements, and fully coordinated among all of the disciplines.
- (v) Finish, door, window, and hardware schedules completed, including all details, system types, special conditions and District requirements or standards referenced and coordinated among all the disciplines of the project.
- (vi) Site utility plans completed.
- (vii) Fixed equipment, cabinets and casework details and Identification completed. Schedule complete with proper references to details, sizes, configurations and standards.
- (viii) Reflected ceiling plans completed and coordinated with floor plans, electrical lighting plans, schedules, details, and mechanical and electrical systems and controls.

Incorporate all information and site designs related to temporary housing, where applicable.

#### **Structural**

- (ix) Structural floor plans and sections with detailing completed. Complete wall sections for each structural system location.
- (x) Structural calculations completed.
- (xi) Structural footing and foundation plans, floor and roof framing plans with detailing completed.

- (xii) Special structural systems designed and detailed including all required bracing for shelving, special systems, brackets, and incidental elements of the design.
- (xiii) Lateral force resisting system calculations completed with system design fully developed and detailing completed and fully coordinated with architectural and other disciplines of the project.
- (xiv) Structural designs, members and systems fully coordinated by Structural Engineer with other disciplines of the project.
- (xv) Completed cover sheet with general notes, symbols and legends.

**b. Mechanical**

- (i) Mechanical calculations completed with all piping and ductwork sized.
- (ii) Large scale mechanical details completed, clearly referenced on plans and schedules, and coordinated with architectural disciplines, electrical, and structural engineering for the project.
- (iii) Mechanical schedule for equipment fully completed, with District reviews and approvals for all specified systems completed.
- (iv) All Mechanical systems fully coordinated with requirements for Electrical and Low Voltage service including Mechanical Controls, Fire safety systems.
- (v) Complete energy conservation calculations and report meeting, or exceeding, the requirements of California State Title 24. Coordinate work of this portion of the project with the District's Energy Consultant to ensure that the project meets the Office of Public School Construction ("OPSC") requirements for inclusion in the special energy funding pool available to the District. This will require special design and coordination of the project design with the District's Consultant.
- (vi) Plumbing systems fully designed with all piping and system elements indicated. Plumbing Fixture Schedule fully completed with District reviews and approvals for all specified systems completed.
- (vii) Complete design of Energy Management System ("EMS").

**c. Food Service**

- (i) Completed, fully developed, detailed, and coordinated Food Services documents for the project.



- (A) All equipment scheduled and coordinated with power, fire suppression, exhaust, control, mounting, wiring, and finishing details and standards included in the documents.
- (B) Materials scheduled, and list of equipment and fixtures schedules indicating Energy Star appliances.
- (C) Final review by the Contra Costa Health Department must be completed prior to completion of the Construction documents phase.

**d. Electrical**

- (i) Lighting, power, signal and communications plans showing all switching and controls. Fixture schedule and lighting details completed. Include any updated photometrics to demonstrate meeting of EQ 1.1 Daylighting.
- (ii) Distribution information on all power consuming equipment, including lighting, power, signal and communication device(s) branch wiring completed.
- (iii) All electrical equipment schedules completed.
- (iv) Special system components plans completed.
- (v) Electrical load calculations completed.
- (vi) Complete design of low voltage systems. Low voltage systems include fire alarm system, security system, clock and public address system, voice data system, and telecom/technology system.
  - (A) Completed system designs to include riser diagrams, single line diagrams, logic and system structure diagrams.
  - (B) Completed low-voltage system specifications and manufacturer requirements incorporated into the documents.
- (vii) WAN and LAN systems and components fully design and completely developed and detailed to indicate network utility connections, sizes and locations of pull/pull boxes, site and routing for all underground system components, sizes and locations, and layouts of MDF spaces and individual building or floor IDF locations, proposed in-building routing approaches, completed and scheduled room LAN components, including computer locations, presentation technology elements, Centralized Voice System components. Final material and product specifications completed after coordination with the District's Technology Consultant.

e. **Civil**

Fully defined development of on and off site utility systems for sewer, electrical, water, stormwater management, storm drain and fire water. Including, without limitation, pipe sizes, materials, Invert elevation location and installation details for all civil and site utility systems.

- (i) Fully coordinated and completed construction documents showing the work of the project with each of the major Utility service providers. Indicate to District that each of the listed major Utility service providers has reviewed the project work and approved routing, connections, and on-site improvements and off-site connections as meeting the providers design standards.

- (A) PG&E
- (B) EBMUD
- (C) SBC
- (D) Comcast
- (E) Local Sanitary District and other Municipal Utility Systems.

Fully completed details approved by and reviewed with each of the providers incorporated into the project.

Fire access routes, fire water systems fully approved and coordinated with local agencies having jurisdiction.

All site plans, site utilities, parking, bike lanes, walkway, accommodations and utilities for applicable temporary housing, and roadway systems fully completed and detailed.

f. **Landscape**

All landscape, hardscape, stormwater management, and irrigation plans updated to reflect update revisions from Design Development Phase Documents.

g. **Construction Cost Budget**

- h. Working with the Design Phase Manager and the Program Manager, who shall have primary responsibility to prepare Cost Estimates for the project, review the Construction Cost Budget for the Project. Along with the conditions identified in the Agreement and the preceding Phases, the following conditions apply to the revised Construction Cost Budget for the Construction Documents Phase:

- i. Construction Documents Estimate: This further revised estimate shall be prepared by specification section, summarized by CSI category and divided by trade and work item. The estimate shall include individual item unit costs of materials, labor and equipment. Sales tax, contractor's mark-ups, and general conditions shall be listed separately.

- j. The Construction Cost Budget for the Project must at no point exceed the District's Construction Budget for the Project. The accuracy of the Construction Cost Budget shall be the primary responsibility of the Design Phase Manager and the Program Manager. The Architect shall participate in Estimate review and shall accept the Construction Cost Budget as reflected in the Cost Estimate updates at this and each phase. However, if Architect believes that the Design Phase Manager estimates are inaccurate, Architect shall inform the District of such belief. If the Cost Estimate exceeds the District's Construction Budget, Architect shall recommend revisions to bring the Design within budget, and/or provide Life Cycle Analysis to demonstrate long-term cost-savings for evaluation with District.
  - (i) At this stage of the design, the Construction Cost Budget may include design contingencies of no more than 0% in the cost estimates.
- k. **Specifications**
  - (i) Complete development and final preparation of technical specifications describing materials, systems and equipment, workmanship, quality and performance criteria required for the construction of the Project in accordance with Section 2.17 of this Agreement.
  - (ii) No part of the specifications shall call for a designated material, product, thing, or service by specific brand or trade name unless:
    - (A) The specification is followed by the words "or equal" so that bidders may furnish any equal material, product, thing, or service, as required by Public Contract Code, section 3400, or
    - (B) The designation is allowable by a specific allowable exemption or exception pursuant to Public Contract Code, section 3400
  - (iii) Specifications shall not contain restrictions that will limit competitive bids other than those required for maintenance convenience by the District and only with District's prior approval.
  - (iv) At one hundred percent (100%) review, District shall review the specifications and shall direct Architect to make corrections at no cost to the District.
  - (v) Coordination of the Specifications with specifications developed by other disciplines.
  - (vi) Specifications shall be in CSI format

(vii) Architect shall review and incorporate the Division 0 and Division 1 Specifications developed by the District into the Project documents.

(A) Architect shall prepare and complete sections of the Division 1 as required by the District for the Project: Summary of Work, or any other Divisions which may require the Architect's Input for the full coordination of the Project documents.

**l. Constructability Review**

The District shall conduct a Constructability review of the Construction Documents. A report shall be given to the Architect who shall make necessary changes along with providing written comments for each item listed in the report.

1. Architect and all sub-consultants shall attend Constructability review meeting(s) to review comments and after completion of changes to the documents shall meet with the reviewers and confirm that all applicable comments have been incorporated into the plans.

a. Incorporation of the comments shall be in a timely fashion coordinated with the completion of DSA Backcheck comments to provide the District with a fully coordinated set of documents for bidding and construction.

**m. Deliverables and Numbers of Copies**

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

(2) Reproducible copies of working drawings

(2) Specifications,

(2) Updated CHPS/HPI scorecard(s) with full documentation for all Prerequisites and Credits targeted, including final Acoustics Performance and Daylighting analysis documentation for CHPS credits EQ 3.1, and EQ 1.1 updated to reflect final Design

(2) Updated T24 whole building energy analysis plus for submittal for PG&E's Savings By Design rebate program, reflecting final Design plus list of Energy Conservation Measures (ECMs) incorporated.

(2) Response to Commissioning agent's comments on Final Design

(2) Engineering calculations

- (2) A statement indicating acceptance of the Revised Construction Cost Budgets developed and reconciled during this phase.
- (2) Statement of requirements for testing and inspection of service for compliance with Construction Documents and applicable codes.
- (2) DSA file including all correspondence, meeting, back check comments, checklists to date.
- (2) A statement indicating any authorized changes made to the design from the last Phase and the cost impact of each change on the previously approved Construction Cost Budget. If no design changes occur but shifts of costs occur between disciplines, identify for District review.

3. **Construction Documents (CD) Final Back-Check Stage**

- a. The Construction Documents final back-check stage shall be for the purpose of the Architect incorporating all regulatory agencies' comments and all Owner and any Commissioning Agent's review comments into the drawings, specifications, and estimate. All changes made by the Architect during this stage shall be at no additional cost to the District.
- b. The final contract documents delivered to the District upon completion of the Architect's work shall be the Bid Set and shall consist of the following:
  - (I) Drawings: Original copies of all drawings with each Architect/consultant's State license stamp.
  - (II) Drawings: Electronic format submitted to the District on PS2.
  - (III) Specifications: Original word-processed technical specifications on reproducible masters in CSI format.
- c. Architect shall update and refine the consultants' completed Construction Documents.
- d. Architect shall submit final CHPS/HPI scorecard(s) as approved by DSA/HPI with any DSA/HPI correspondence and final HPI-1 form, as well as approved CHPS Verified Design credits, if applicable, with any additional documentation submitted for all Prerequisites and Credits targeted.
- e. **Meetings** During this Phase, Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below.

- **BIDDING PHASE**

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

1. Assist the District during the Bidding Phase by coordinating responses to questions related to the drawings and specifications for the Project.
2. In conjunction with the Design Phase Manager and the Program Manager who shall have primary responsibility for Bidding Phase management, coordinate the development of the bidding timing, walkthroughs, procedures and be responsible for the construction contract documents prepared for the District.
3. While the Project is being advertised for bids, all questions concerning intent shall be referred to the District for screening and subsequent processing through Architect.
4. In the event that items requiring interpretation of the drawings or specifications are discovered during the bidding period, those items shall be analyzed by the Architect for decision by the District as to the proper procedure required. Corrective action will be in the form of an addendum prepared by the Architect and issued by the District.
  - a. Coordinate issuance of all Addenda for the project with the Program Manager. Meet all legally required deadlines for information changes to bidders.
5. Attend bid opening.
6. Coordinate with sub-consultants regarding updates, modifications, changes, and Addenda to the drawings.
7. Respond to District questions and clarifications.
8. Assist the district in completing Architect's portions of any SAB forms with HPI-1 forms attached, for OPSC funding.
9. **Deliverables and Number of Copies**

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

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

• **CONSTRUCTION ADMINISTRATION PHASE**

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

1. The Architect's responsibility to provide basic services for the Construction Phase under the Agreement commences with the award of the contract for construction and terminates upon satisfactory performance and completion of all tasks in this phase and commencement of the Closeout Phase, or upon the District's terminating the Agreement, whichever is earlier.
2. During construction, the Architect shall furnish all necessary additional drawings for supplementing, clarifying, and/or correcting purposes and for change orders. The District shall request these drawings from the Architect and shall be at no additional cost unless designated as Extra Services by the District. The original tracing(s) and/or drawings and contract wording for change orders shall be submitted to the District for duplication and distribution.
3. **Submittals**
  - a. Architect shall review and take appropriate action upon contractor's submittals such as: shop drawings, Project data, samples and change orders, but only for the limited purpose of checking for conformance with information given and the design concept expressed in the contract documents, including documented CHPS/HPI credits..
  - b. The Architect's action upon contractor's submittals shall be taken as expeditiously as possible so as to cause no unreasonable delay in the Project or in the work of separate contractors, while allowing sufficient time in the Architect's professional judgment to permit adequate review. In no case shall the review period associated with a single, particular submittal exceed twenty-one (21) calendar days from its receipt by the Architect. Architect's response to each submittal shall be a substantive and acceptable response. This 21-day time period shall not include time when a submittal is within the District's control or if the submittal is being reviewed by DSA. In no way does this provision reduce the Architect's liability if it fails to prepare acceptable documents.
4. **RFIs**
  - a. During the course of construction, all Requests for Information ("RFI") must be responded to as expeditiously as possible so as not to impact and delay the construction progress. In no case shall the review period associated with an RFI exceed seven (7) calendar days from the receipt by the Architect. Architect's response to each RFI shall be a substantive and acceptable response. This 7-day time period shall not include time when a submittal is within the District's control or if the submittal is being reviewed by DSA. In no way does this provision

reduce the Architect's liability if it fails to prepare acceptable documents.

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

These drawings [or corrected specifications] have been prepared based on information submitted, in part, by others. The Architect has provided a review consistent with its legal standard of care.

8. **O&M Manuals / Warranties.** Architect shall review equipment, operation and maintenance manuals, and a complete set of warranty documents for all equipment and installed systems, to ensure that they meet the requirements of the plans and specifications.
9. Architect shall also provide, at the District's request and at no additional cost to the District, architectural/engineering advice to the District on start-up, break-in, and debugging of facility systems and equipment, and apparent deficiencies in construction following the acceptance of the contractor's work for a period of six months following the completion of work.
10. Recommendations of Payment by Architect constitute Architect's representation to the District that work has progressed to the point indicated to the best of Architect's knowledge, information, and belief, and that the quality of the work is in general conformance with the contract documents.
11. **Deliverables and Number of Copies**



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

- (2) Meeting report/minutes from kick-off meeting;
- (2) Observation reports;
- (2) Weekly meeting reports which reflect substantive Architectural, Commissioning or CHPS/HPI issues discussed.
- (2) Final acoustics performance testing report and CHPS/HPS documentation to verify CHPS EQ 3.1 is met.

**12. Meetings**

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

**• CLOSE OUT PHASE**

1. As the Construction Administration Phase progresses, the Architect shall perform the following Close Out Phase services for the District as required:
  - a. Architect shall review the project and observe the construction as required to determine when the contractor has completed the Project and shall prepare punch lists of items that remain in need of correction or completion.
  - b. Architect shall collect from the contractor, review, and forward to the District all written warranties, operation manuals, spare parts, lien waivers, and Certificates of Inspection and Occupancy with Architect's recommendation as to the adequacy of these items.
  - c. Architect shall prepare or collect, as applicable, and provide to DSA, all reports required by DSA on the Project.
  - d. Architect shall obtain all required DSA approval on all change orders and addenda to the contractor's contract. Final Closeout and Certification of the Project with the DSA shall be a condition precedent to the Architect receiving final payment on the project.
  - e. Architect shall prepare a final verified report for the Project.
  - f. Architect shall prepare a set of As-Built Drawings for the Project utilizing the Record Drawings.
  - g. Architect shall review and prepare a package of all warranty and M&O documentation.

- h. Architect shall organize electronic files, plans and prepare Project binder.
  - i. Architect shall coordinate all Services required to close-out the Project with the District and between consultants.
  - j. Architect shall, prior to final payment and at its own expense, provide the District with two copies on CD-ROM of the final DSA approved, bound .DWG, .PDF or .TIF format Drawings.
- 2. The District shall prepare and record with the County Recorder a Notice of Completion for the Project.
- 3. **Deliverables and Number of Copies**
  - (2) Punch lists for each site before any Building Flush-out
- 4. **Meetings**

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

• **MEETINGS / SITE VISITS / WORKSHOPS**

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

2. **General Meeting, Site Visit, and Workshop Requirements**

- a. Architect shall always be prepared to answer questions and issues from District staff, site staff, potential bidders, and/or contractors, as applicable.
- b. Architect shall maintain a log of all meetings, site visits or site observations held in conjunction with the work of this Project, with documentation of major discussion points, observations, decisions, questions or comments. These shall be furnished to the District and/or its representative for inclusion in the overall Project documentation.
- c. As required, Architect shall provide to the District copies of all documents or other information needed for each meeting, site visit, and workshop. These copies shall be a reimbursable expense.
- d. Meeting times shall be as required to complete the work and shall be held at the District office or at one of the Project sites, unless otherwise indicated.

3. **Meetings During Project Initiation Phase**

- a. Within the first week following execution of the Agreement, the Architect shall participate in one Project kick-off meeting for all sites to determine the Project intent, scope, budget and timetable, which shall encompass the following:
  - (i) The Architect, its appropriate consultant(s), and District staff, shall attend the meeting.
  - (ii) The Project kick-off meeting will introduce key team members from the District and the Architect to each other, defining roles and responsibilities relative to the Project.
  - (iii) During this meeting, the Architect shall:
    - (A) Identify and review pertinent information and/or documentation necessary from the District for the completion of the Project.

- (B) Review and explain the overall Project goals, general approach, tasks, work plan and procedures and deliverable products of the Project.
- (C) Review and explain the scope of work and Project work plan for all parties present; determine any adjustments or fine tuning that needs to be made to the work plan.
- (D) Review documentation of the Project kick-off meeting prepared by the District's representative and comment prior to distribution.

**4. Initial Site Visits meetings and site reviews as required without limitation to correctly inventory and identify all pertinent elements of the existing site and buildings for consideration as a part of the Project.**

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

**5. Meetings During Architectural Program**

- a. Architect shall participate in one public community information site meeting, per site, to receive input from the community regarding its wishes and expectations regarding the design of Architect's work on the Project and the schedule of use of the sites during construction.
- b. Architect shall conduct one site visit/meeting, per site, with the District's facilities team to gather information from District facilities team and site personnel and to make a visual presentation regarding the Project.
- c. Electrical, civil, mechanical, structural, landscaping, and estimating consultant(s) shall participate in these meetings as appropriate and shall provide input and feedback into the development of the Construction Cost Budget.

**6. Meetings During Schematic Design Phase**

- a. Within the first two weeks following the start of the Schematic Design Phase, Architect shall conduct ongoing design meetings, with the District's facilities team and site personnel to complete a basic design framework of the Project. These workshops (Site Committee Meetings) shall be ongoing and may include several meetings and shall not be concluded until the principal has indicated his or her acceptance with the Architect's preliminary design. These Site Committee Meetings shall include the following:
  - (i) Architect shall designate its team member duties and responsibilities;
  - (ii) Architect and District shall review District goals and expectations;

- (iii) District shall provide Input and requirements;
- (iv) Architect and District shall review Project scope and budget;
- (v) Architect shall, on an ongoing basis, prepare updated plans, drawings, sketches, renderings to respond to proposed Project configurations during this phase;
- (vi) Prepare and/or revise the scope of work list and general workplan from the Pre-Design Phase, for documentation in a computer-generated Project schedule;
- (vii) Establish and agree regarding methods to facilitate the communication and coordination efforts for the Project.

**7. Meetings During Design Development Phase**

- a. At the time designated for completion of the Design Development package, Architect shall conduct ongoing meetings, per package of submittal, as required to complete the work of this phase, with the District to review the following:

- (i) Present the Design Development package for review and comment to proceed with preparation of final plans and specification.

- (ii) Architect and District shall review Project scope and budget.

- b. **Value Engineering Workshop**

If the Project is shown to be over the District approved construction cost budget, the Architect shall participate in and coordinate with up to two (2) value engineering workshops, as requested by the District, including all Architect's consultant(s), the District, and the Construction Manager during the Design Development Phase.

**8. Meetings During Construction Documents Phase**

- a. Prior to the fifty percent (50%) CD design package, Architect shall conduct meetings as required, per package of submittal, with the District to revise the Design Development package and receive comments.

- b. **50% CD Review Meeting.** In lieu of a 50% CD submittal, the Architect shall initiate and coordinate an in-house 50% CD review with the District, Construction Manager, Design Phase Managers. This review shall include mandatory attendance by all of the Architect's sub-consultants and each shall present work-in-progress drawings, specifications, tables, calculations, sketches or other material clearly indicating that the work has progressed to the 50% CD phase.

- c. After the time designated for completion of the fifty percent (50%) submittal package, Architect shall conduct additional meetings, per package or submittal, with the District to review the following:
  - (i) Not used
  - (ii) Architect and District shall provide further review of Project scope and budget;
- d. At the time designated for completion of the one hundred percent (100%) Construction Document package, Architect shall conduct meetings as required, per package or submittal, with the District to review the following:
  - (i) Present the hundred percent (100%) Construction Document package for review and comment to proceed with preparation of final plans and specification.
  - (ii) Architect and District shall provide further review of Project scope and budget.

**9. Meetings During Bidding Phase**

- a. Attend and take part in 2 pre-bid meetings with all potential bidders, District staff, and Program Manager, the Construction Manager and/or Design Phase Manager.
- b. Conduct one kick-off meeting, per site, with the successful bidder for each project package, District staff, and Program Manager, Construction Manager to finalize the roles and responsibilities of each party and provide protocols and processes to follow during construction.

**10. Meetings During Construction Administration Phase, plus weekly project meetings until entire project is complete.**

- a. Architect shall visit the Project site as necessary or when requested, and in no case less than once per week, sufficient to determine that the Project is being constructed in accordance with the plans and specifications, and to resolve discrepancies in the contract documents and to monitor the progress of the Project. Architect may coordinate these site visits so that it observes more than one site on one site visit to the District.
- b. Conduct weekly project meetings with District staff to review with District staff the progress of the work. Construction phase meetings shall be as required to complete the work in conformance with the District's proposed schedule for construction, for each of the project phases identified. Extension of the established construction schedule may be justification for additional services unless such extension is the result of the Architect's negligence, errors, or omissions.

- c. Architect shall ensure that consultant(s) visit the site in conformance with their agreement and that sub-consultant agreements shall reference District requirements for Construction Phase services.

**11. Citizens' Bond Oversight Committee Meetings**

Architect acknowledges that the Project is subject to oversight by the District's citizen bond oversight committee. Architect shall, at the District's direction, attend one District citizen bond oversight committee meeting and present the Architect's design to the District's citizen bond oversight committee for review and recommendation to the District's governing board.

**12. Governing Board Meetings**

Architect acknowledges that the District's governing board must approve all designs. Architect shall, at the District's direction, attend up to two District governing board meeting(s) and present the Architect's design to the District's governing board for review and approval.

## **EXHIBIT "B"**

### **CRITERIA AND BILLING FOR EXTRA WORK**

The following Extra Work to the Agreement shall be performed by Architect if needed and if authorized or requested by the District:

- A. Making revisions in drawings, specifications, or other documents when such revisions are:
  - 1. Inconsistent with approvals or instructions previously given by the District.
  - 2. Required by the enactment or revisions of codes, laws, or regulations subsequent to the preparation of the Conforming Set.
  - 3. Due to changes required as a result of the District's failure to respond to a written request from the Architect within a reasonable time, as requested by Architect.
- B. Providing Work required because of significant documented changes in a Project initiated by the District, including but not limited to size, quality, complexity, the District's schedule, or method of bidding or negotiating and contracting for construction.
- C. Providing consultation concerning replacement of work damaged by fire or other cause during construction and furnishing Work required in connection with replacement of that work.
- D. Providing Work made necessary by the default of contractor(s), by major defects, or deficiencies in the work of contractor(s).
- E. In the absence of a final Certificate of Payment or Notice of Completion, providing Work more than sixty (60) days after the date of completion of work by contractor(s) and after Architect has completed all of its obligations and tasks under the Agreement.
- F. Providing deliverables or other items in excess of the number indicated in Exhibit "A." Before preparing, providing, sending, or Invoicing for extra deliverables, Architect shall inform the District that expected deliverables may be in excess of the number indicated in Exhibit "A," so that District can procure the additional deliverables itself or direct Architect to procure the deliverables at District's expense or on District's account at a specific vendor.
- G. Providing Work as directed by the District that are not part of the Work of this Agreement.
- H. Providing Work as an expert and/or witness for the District in any mediation, arbitration, and/or trial in which the Architect is (1) not a party, and (2) did not in any way cause the dispute that is being adjudicated.
- I. Providing training, adjusting, or balancing of systems and/or equipment



- J. The following rates, which include overhead, administrative cost and profit, shall be utilized in arriving at the fee for extra Work and shall not be changed for the term of the Agreement.

<b>Job Title</b>	<b>Hourly Rate</b>
Principal In Charge:	\$200.00
Project Director:	\$165.00
Project Manager:	\$130.00
Project Designer:	\$122.00
Project Architect:	\$105.00 - \$155.00
Construction Administrator:	\$120.00 - \$155.00
Draftsperson:	\$100.00 - \$115.00
Technical/Production Assistant:	\$75.00 - \$110.00

- K. The mark-up on any approved item of Extra Work shall not exceed five percent (5%).

## EXHIBIT "C"

### SCHEDULE OF WORK

- A. Promptly after the execution of this Agreement, the Architect shall prepare and submit for approval to the District a Schedule of Work showing the order in which Architect proposes to carry out Architect's work ("Schedule of Work"). The Schedule of Work shall apply to the completion of all Work listed hereunder within the times established by this Agreement. The Schedule of Work shall be in the form of a progress chart clearly delineating all important increments and review dates. Architect shall update the Schedule of Work on a monthly basis and deliver two (2) copies to the District along with the monthly billing.
- B. Architect shall complete all Work and Services required under the Development of Architectural Program section within 30 calendar days after written authorization from the District to proceed.
- C. Architect shall complete all Work and Services required under the Schematic Design Phase within 90 calendar days after written authorization from District to proceed.
- D. Architect shall complete all Work and Services required under the Design Development Phase within 120 calendar days after receipt of a written authorization from District to proceed.
- E. Architect shall complete all Work and Services required under Construction Documents Phase within 210 calendar days after written authorization from the District to proceed, and as more specifically indicated below. Excluded from this duration is the time associated with the Construction Documents back-check stage.
- |    |   |                           |
|----|---|---------------------------|
| 1. | 50% Submittal Package                                 | <u>75</u> <u>calendar</u> |
|    | <u>days</u>   |                           |
| 2. | 100% Submittal Package                                | <u>75</u> <u>calendar</u> |
|    | <u>days</u>   |                           |
| 3. | Final Contract Documents after Final Back-Check Stage | <u>60</u> <u>calendar</u> |
|    | <u>days</u>   |                           |
- F. The durations stated above include the review periods required by the District and all other regulatory agencies.
- G. All times to complete tasks set forth in this Exhibit are of the essence, as indicated in the Agreement. If delays in the Schedule of Work are imposed by the District's inability to comply with requested meeting schedules, Architect shall maintain the right to request an adjustment in the Schedule of Work if deemed necessary to meet the deadlines set forth in this Exhibit. If approved, those extensions shall be authorized in writing by the District.

## EXHIBIT "D"

### PAYMENT SCHEDULE

#### A. Compensation

1. The payment of consideration to Architect as provided herein shall be full compensation for all of Architect's Work incurred in the performance hereof, including, without limitation, all costs for personnel, travel within two hundred (200) miles of a Project location, offices, per diem expenses, printing and shipping of deliverables in the quantities set forth in Exhibit "A," or any other direct or indirect expenses incident to providing the Work. Except as expressly set forth in the Agreement and Exhibit "B," there shall be no payment for extra costs or expenses.
2. The total compensation to Architect shall be as stated in Article 6 of the Agreement.
3. District shall pay Architect as follows for all Work contracted for under this Agreement:

PERCENTAGE OF TOTAL FEE PER PHASE	
Phase	Phase Amount
Pre-Design/Architectural Program Development Phase	2.5%
Schematic Design Phase	10%
Design Development Phase	17.5%
Construction Documents Phase-Submittal to DSA	30%
Approval by DSA	5%
Bidding Phase	2%
Construction Administration Phase	23%
Close Out Phase	10%
Generate Punch List	2%
Sign Off On Punch List	2%
Receive and Review All M & O Documents	2%
Filing All DSA Required Close Out Documents	2%
Receiving DSA Close Out, including DSA approval of the final As-Built set of drawings	2%
<b>TOTAL BASE COMPENSATION</b>	<b>100%</b>

#### B. Method of Payment

1. Invoices shall be on a form approved by the District and are to be submitted in triplicate to the District via the District's authorized representative.
2. Architect shall submit to District on a monthly basis documentation showing proof that payments were made to its consultant(s).
3. Architect shall submit to the District for approval a copy of the Architect's monthly pay request format.
4. Upon receipt and approval of Architect's invoices, the District agrees to make payments within thirty (30) days of receipt of the invoice as follows:

a. **Pre- Design/Architectural Program Development Phase:**

Monthly payments for the percentage of Work complete up to ninety-five percent (95%) of the fee for the Phase; one hundred percent (100%) payment upon acceptance and approval of the Pre-Design/Architectural Program.

b. **For Schematic Design Phase:**

Monthly payments for the percentage of Work complete up to ninety-five percent (95%) of the fee for the Phase; one hundred percent (100%) payment upon acceptance and approval of the Schematic Design Phase by the District.

c. **For Design Development Phase:**

Monthly payments for the percentage of Work complete up to ninety-five percent (95%) of the fee for the Phase; one hundred percent (100%) payment upon acceptance and approval of the Design Development Phase by the District.

d. **For Construction Documents Phase:**

Monthly payments for percentage of Work complete up to ninety-five percent (95%) of the fee for the phase; one hundred percent (100%) payment upon acceptance and approval of the Construction Documents Phase by the District.

e. **For Bidding Phase:**

Monthly payments for the percentage of Work complete up to ninety-five percent (95%) of the fee for the phase; one hundred percent (100%) payment upon the District's award of the bid.

f. **For Construction Administration Phase:**

Monthly payments for the percentage of Work complete up to ninety-five percent (95%) of the fee for the phase; one hundred percent (100%) payment upon the District's notice of completion.

g. **For Close Out:**

Lump sum payment thirty-five (35) days after completion of all items in this phase.

h. **Format and Content of Invoices:**

Architect acknowledges that the District requires Architect's invoices to include detailed explanations of the Work performed. For example, a six hour charge for "RFIs and CORs" is unacceptable and will not be payable. A more detailed explanation, with specificity, is required. This includes a separate entry for each RFI, PCO, and change order.

For example, the following descriptions, in addition to complying with all other terms of this Agreement, would be payable. The times indicated below are just placeholders:

Review RFI 23; review plans and specifications for response to same; prepare responses to same and forward to contractor, district, construction manager, and project inspector.	.8 hours
Review COR 8; review scope of same and plans and specifications for appropriateness of same; prepare draft change order and language for same.	.7 hours
Review COR 11; review scope of same and plans and specifications for appropriateness of same; prepare rejection of COR 11 for review by district, CM, IOR.	1.2 hours

## EXHIBIT "E"

### INSURANCE REQUIREMENTS

- A. Architect shall procure prior to commencement of the Work of this Agreement and maintain for the duration of the Agreement insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Work hereunder by the Architect, his agents, representatives, employees and consultant(s). Architect's liabilities, including but not limited to Architect's indemnity obligations, under this Agreement, shall not be deemed limited in any way to the insurance coverage required herein. Maintenance of specified insurance coverage is a material element of this Agreement and Architect's failure to maintain or renew coverage or to provide evidence of renewal during the term of this Agreement, as required or when requested, may be treated as a material breach of contract by the District.
- B. **Minimum Scope and limits of Insurance:** Coverage shall be at least as broad as the following scopes and limits:
1. **Commercial General Liability.** One million dollars (\$1,000,000) per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to each project/location or the general aggregate limit shall be twice the required occurrence limit.
  2. **Commercial Automobile Liability, Any Auto.** One million dollars (\$1,000,000) per accident for bodily injury and property damage.
  3. **Workers' Compensation Liability.** For all of the Architect's employees who are subject to this Agreement and to the extent required by the applicable state or federal law, the Architect shall keep in full force and effect, a Workers' Compensation policy. That policy shall provide employers' liability coverage with minimum liability coverage of One million dollars (\$1,000,000) per accident for bodily injury or disease. The Architect shall provide an endorsement that the insurer waives the right of subrogation against the District and its respective elected officials, officers, employees, agents, representatives, consultants, trustees, and volunteers.
  4. **Employers' Liability.** For all of the Architect's employees who are subject to this Agreement and to the extent required by the applicable state or federal law, the Architect shall keep in full force and effect, an Employment Practices Liability policy. That policy shall provide employers' liability coverage with minimum liability coverage of One million dollars (\$1,000,000) per occurrence. The Architect shall provide an endorsement that the insurer waives the right of subrogation against the District and its respective elected officials, officers, employees, agents, representatives, consultants, trustees, and volunteers.
  5. **Professional Liability.** This insurance shall cover the prime design professional and his/her consultant(s) for Two million dollars (\$2,000,000)

aggregate limit subject to no more than Fifty thousand dollars (\$50,000) per claim deductible, coverage to continue through completion of construction plus two years thereafter.

- C. The District reserves the right to modify the limits and coverages described herein, with appropriate credits or changes to be negotiated for such changes.
- D. **Deductibles and Self-Insured Retention:** The Architect shall inform the District in writing if any deductibles or self-insured retention exceeds \_\_\_\_\_ thousand dollars (\$\_\_\_\_,000). At the option of the District, either:
1. The District can accept the higher deductible;
  2. The Architect's insurer shall reduce or eliminate such deductibles or self-insured retention as respects the District, its officers, officials, employees and volunteers; or
  3. The Architect shall procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses.
- E. **Other Insurance Provisions:** The general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:
1. The District, the District's Program Manager, Construction Manager, or both, their representatives, consultants, trustees, officers, officials, employees, agents, and volunteers ("Additional Insureds") are to be covered as additional Insureds as respects liability arising out of activities performed by or on behalf of the Architect; instruments of service and completed operations of the Architect; premises owned, occupied or used by the Architect; or automobiles owned, leased, hired or borrowed by the Architect. The coverage shall contain no special limitations on the scope of protection afforded to the Additional Insureds.
  2. For any claims related to the projects, the Architect's insurance coverage shall be primary insurance as respects the Additional Insureds. Any insurance or self-insurance maintained by the Additional Insureds shall be in excess of the Architect's insurance and shall not contribute with it.
  3. Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to the Additional Insureds.
  4. The Architect's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.
  5. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be suspended, voided, canceled by either party, reduced in coverage or in limits except after thirty (30) days prior written notice by certified mail, return receipt requested, has been given to the District.
- F. **Acceptability of Insurers:** Insurance is to be placed with insurers admitted in California with a current A.M. Best's rating of no less than A:VII. The Architect shall

inform the District in writing if any of its insurer(s) have an A.M. Best's rating less than A:VII. At the option of the District, either:

1. The District can accept the lower rating; or
2. Require the Architect to procure Insurance from another insurer.

**G. Verification of Coverage:** Architect shall furnish the District with:

1. Certificates of insurance showing maintenance of the required insurance coverage; and
2. Original endorsements affecting general liability and automobile liability coverage. The endorsements are to be signed by a person authorized by that insurer to bind coverage on its behalf. All endorsements are to be received and approved by the District before Work commence.



<b>ACORD<sup>TM</sup> CERTIFICATE OF LIABILITY INSURANCE</b>		DATE (MM/DD/YY) 1/29/2014
<b>PRODUCER</b> Dealey, Renton & Associates P. O. Box 12675 Oakland, CA 94604-2675 510 465-3090	THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.	
<b>INSURED</b> HKIT Architects 538 Ninth Street, Suite 240 Oakland, CA 94607	<b>INSURERS AFFORDING COVERAGE</b> INSURER A: Hartford Casualty Insurance Co. INSURER B: American Automobile Ins. Co. INSURER C: XL Specialty Insurance Co. INSURER D: INSURER E:	

**COVERAGES**

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

INSR LTR	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS
A	<b>GENERAL LIABILITY</b>	57SBWLV1922	08/28/13	08/28/14	EACH OCCURRENCE \$1,000,000
	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b>				FIRE DAMAGE (Any one fire) \$300,000
	<input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR				MED EXP (Any one person) \$10,000
					PERSONAL & ADV INJURY \$1,000,000
					GENERAL AGGREGATE \$2,000,000
					PRODUCTS - COMP/OP AGG \$2,000,000
GEN'L AGGREGATE LIMIT APPLIES PER:					
	<input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC				
A	<b>AUTOMOBILE LIABILITY</b>	57SBWLV1922	08/28/13	08/28/14	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000
	<input type="checkbox"/> ANY AUTO				BODILY INJURY (Per person) \$
	<input type="checkbox"/> ALL OWNED AUTOS				BODILY INJURY (Per accident) \$
	<input type="checkbox"/> SCHEDULED AUTOS				PROPERTY DAMAGE (Per accident) \$
	<input checked="" type="checkbox"/> HIRED AUTOS				AUTO ONLY - EA ACCIDENT \$
	<input checked="" type="checkbox"/> NON-OWNED AUTOS				OTHER THAN AUTO ONLY: EA ACC \$
					AGG \$
					\$
					\$
					\$
<b>GARAGE LIABILITY</b>					
<input type="checkbox"/> ANY AUTO					
<b>EXCESS LIABILITY</b>					
<input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE					
<input type="checkbox"/> DEDUCTIBLE					
<input type="checkbox"/> RETENTION \$					
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>	WZP81012110	09/01/13	09/01/14	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER
	E.L. EACH ACCIDENT \$1,000,000				
	E.L. DISEASE - EA EMPLOYEE \$1,000,000				
	E.L. DISEASE - POLICY LIMIT \$1,000,000				
C	<b>OTHER Professional Liability</b>	DPR9709637	08/28/13	08/28/14	\$1,000,000 per Claim \$2,000,000 Annl Aggr.

**DESCRIPTION OF OPERATIONS/LOCATIONS/VEHICLES/EXCLUSIONS ADDED BY ENDORSEMENT/SPECIAL PROVISIONS**

General Liability Policy excludes claims arising out of the performance of professional services.

PROJECT: Glenview Renovation

Oakland Unified School District and its directors, officers, employees, agents and representatives are named as Additional Insureds to General Liability per policy form wording.

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

Insured: HKIT Architects  
Insurer: Hartford Casualty Insurance Co.  
Policy Number: 57SBWL1922  
Policy Effective Date: 08/28/13

Additional Insured: PROJECT: Glenview Renovation Oakland Unified School District and its directors, officers, employees, agents and representatives

EXCERPTS FROM: Hartford Form SS 00 08 04 05

## BUSINESS LIABILITY COVERAGE FORM

### C. WHO IS AN INSURED

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

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

##### f. Any Other Party

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

(a) In the performance of your ongoing operations;

(b) In connection with your premises owned by or rented to you; or

(c) In connection with "your work" and included within the "products-completed operations hazard, but only if

(i) The written contract or written agreement requires you to provide such coverage to such additional insured; and

(ii) This Coverage Part provides coverage for "bodily injury" or "property damage" included within the "products-completed operations hazard."

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

### E.5. Separation of Insureds

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

a. As if each Named Insured were the only Named Insured; and

b. Separately to each Insured against whom a claim is made or "suit" is brought.

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

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

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

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

EXCERPT FROM Hartford Form SS 04 38 06 01

### HIRED AUTO AND NON-OWNED AUTO

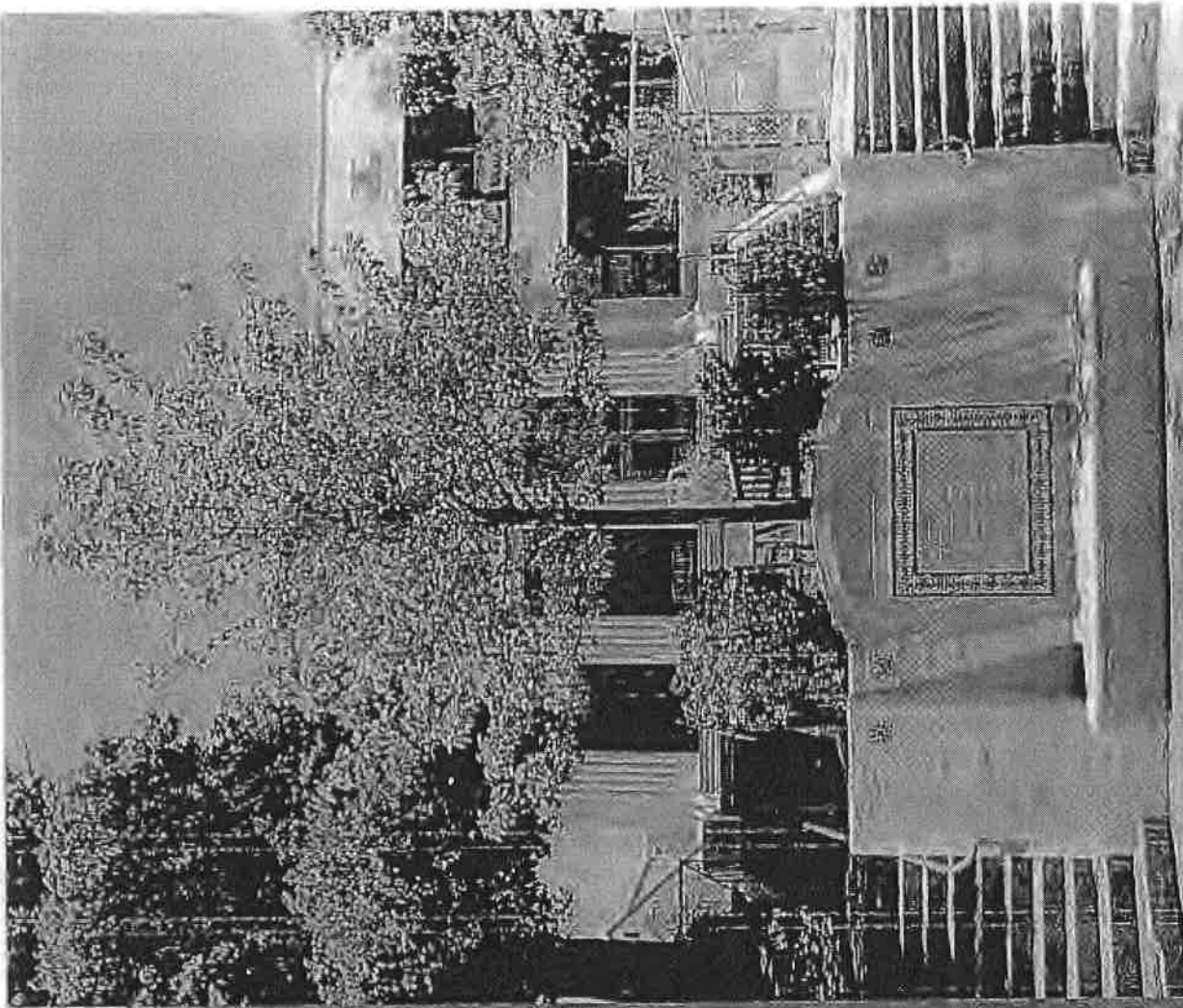
B. With respect to the operation of a "non-owned auto", WHO IS AN INSURED is replaced by the following:  
The following are "insureds":

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



# GLENVIEW ELEMENTARY SCHOOL

OAKLAND UNIFIED SCHOOL DISTRICT



HKIT

NOVEMBER 15, 2013



# MASTER PLAN OBJECTIVES

- To assess the feasibility of modernizing the existing building including seismically upgrading structures and replacing the existing portables or building all new construction
- To respond to AB300 Seismic Guidelines
- To meet District standards for 21<sup>st</sup> Century Learning environments and high quality neighborhood schools



# STEPS

- Engage with District, Site Staff, Parents and Students
- Evaluate Existing Conditions
- Develop Building Program
- Create Vision for Campus
- Develop and Refine Plan Options with Users
- Provide Cost Estimating for two Options
- Provide Recommendation

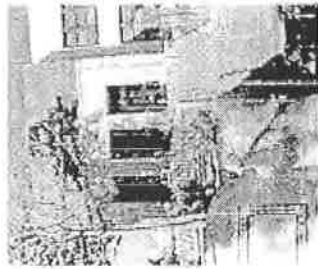


# INPUT

Gather Input and Review Options with:

- District Staff
- School Site Core Committee  
(Principal, Teachers, PTA, Parents, District Staff)
- School Site Staff
- Students
- Parents





# PROGRAMMING

- K-5 School for 524 Students
- 3 Classrooms per Grade Level
- Flex Classroom
- Special Needs Preschool and Special Needs K-5
- Administration, Multi-Purpose and Library
- Support Spaces
- Outdoor Assembly and Play Areas (Lower Play Yard and Garden to remain)

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- Auditorium has become tight, has acoustic problems
- Very poor heating & cooling
- Administration is too small
- Lacking sinks in classrooms
- Teachers' storage lacking
- Lack of natural light
- Air quality (no mechanical ventilation)
- Classroom layout antiquated, too small (assume teaching lecture style)
- Electrical power deficiencies
- Lack of accessibility for strollers, others
- Lack of food service

[illegible]

- Aged finishes: Linoleum peeling up
- Cafe too small
- First floor hallway dark
- Artificial light throughout is poor quality
- Poor service access: Narrow driveway, hard to access auditorium, currently unload equipment at street
- Classrooms facing street are hot
- More bathrooms needed: Kinder/students and staff

## EXISTING CONDITIONS ANALYSIS



## VISION FOR GLENVIEW

### Notes (March 13, continued)

- Equipment- White boards, smart boards, elec., (integrate, make useful)
- Adaptable classroom: Outlets
- Living roof - Instructional opportunity
- Water/sinks in every classroom
- Storage/shelving: Teacher input, right sizing
- Built in easels (art work)
- Outdoor space/deck for teacher lounge
- Window maintenance for cleaning
- Flooring: Hard surface (linoleum)
- Kindergarten: Need safe, age appropriate play yard
- Play equipment storage (easily accessible)

### Program (March 13)

- Place to cook food
- AC Not Part of District Standards
- Multi-Use to be used for dining; separate music classroom
- After School: Shared users will need space for storage
- Faculty Room: Range requested
- PTA: Need cooking space
- Provide changing rooms in special needs classrooms

## Glenview

We have a good school but I think we should change some things. I think we should be able to stretch the budget on and off in the classroom. We also need to make the bathroom stalls bigger. My last idea is that we need a bigger auditorium for music and other assemblies.

Across from

The School

Key: = entrance

= bathroom

= storage

= cafeteria

Library =

= vending machine

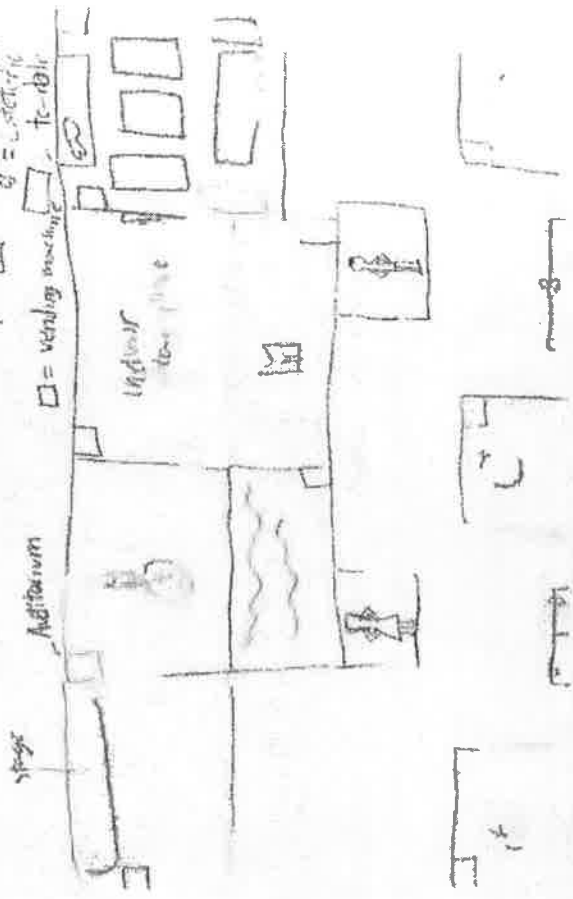
= table

stage

Auditorium

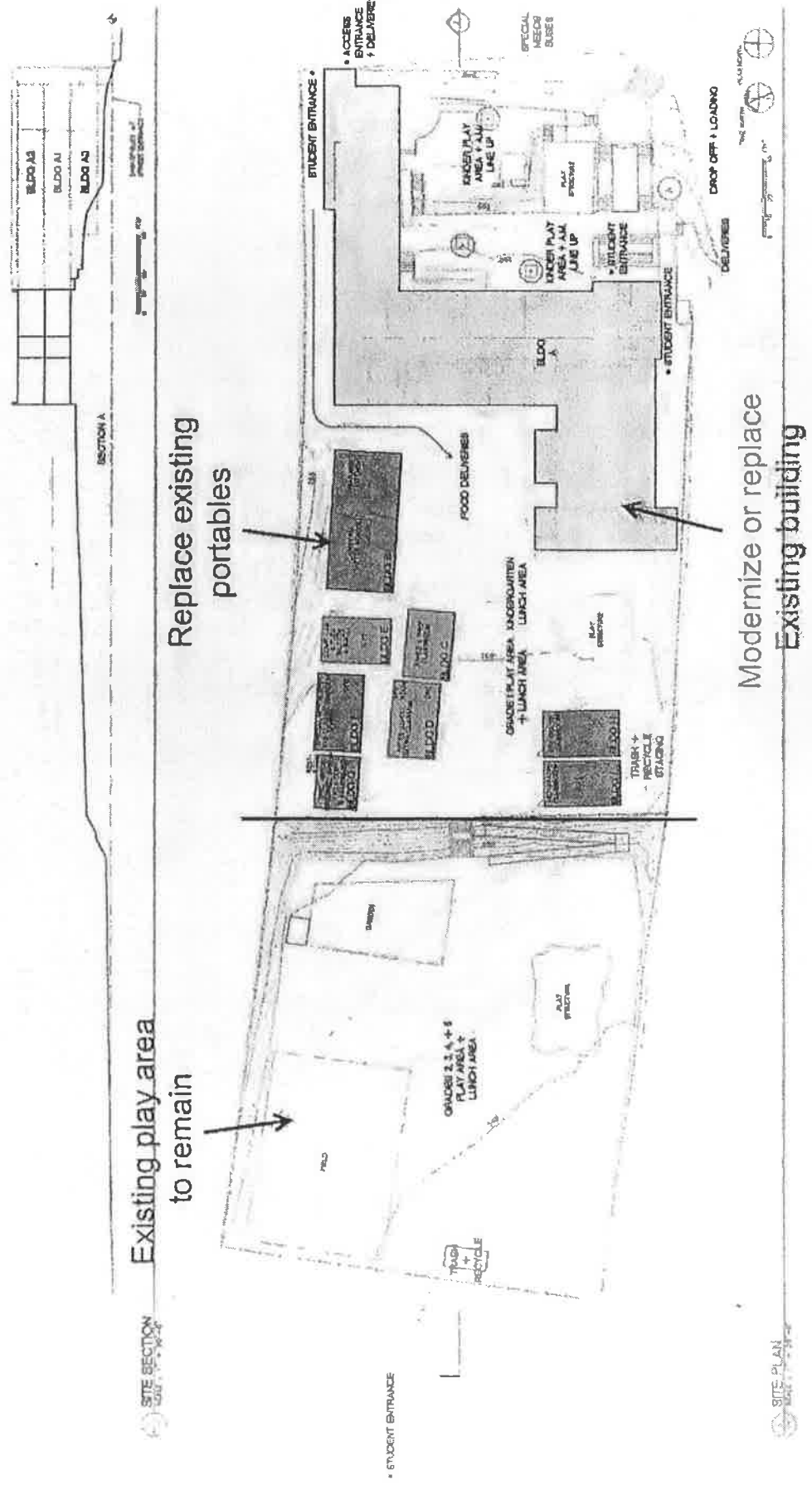
Indoor

tennis



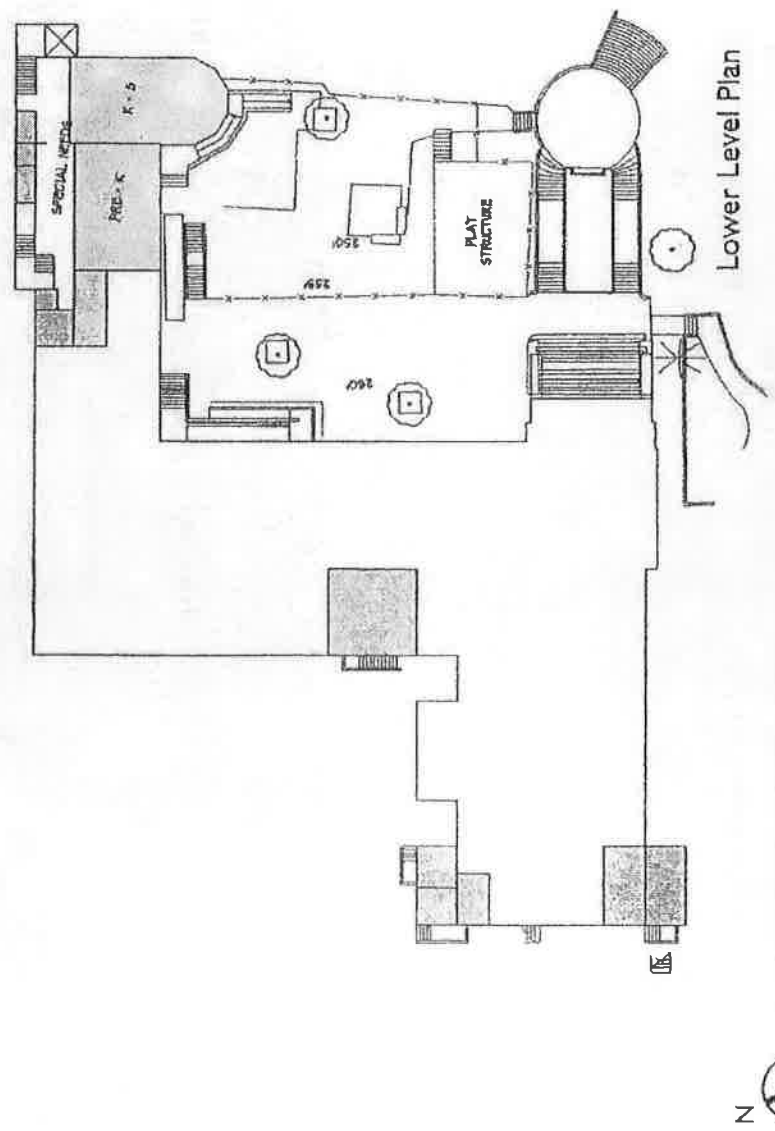
## VISIONING PROCESS

HKIT



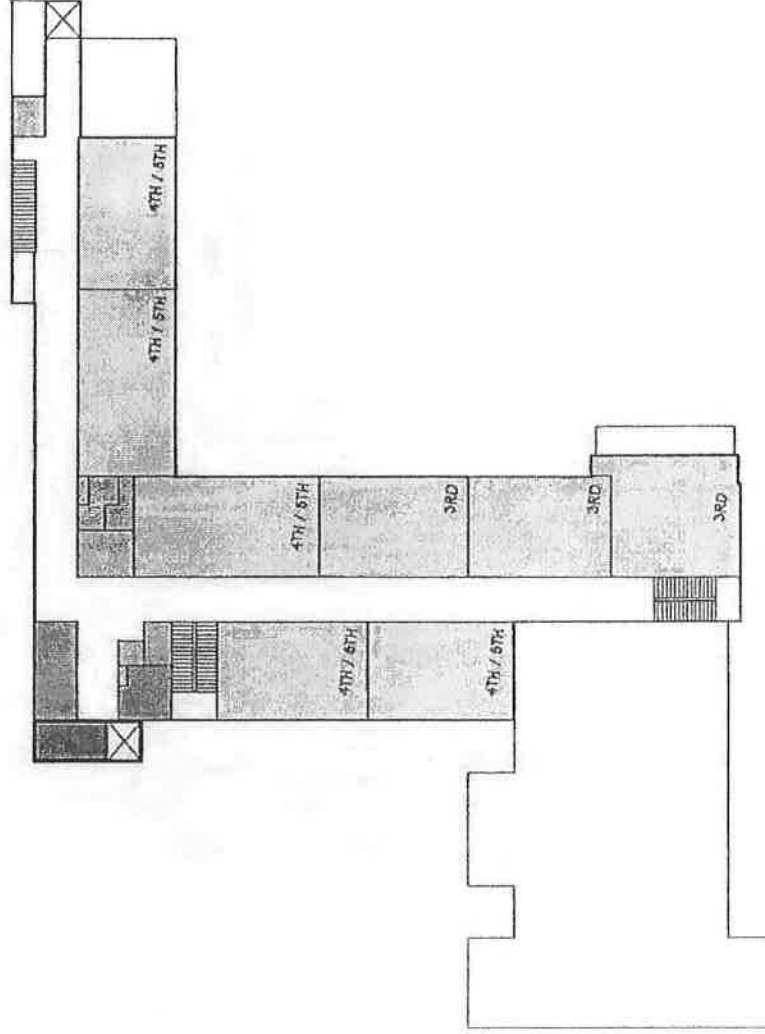
# EXISTING CONDITIONS

USAGE KEY	
	New Classrooms
	Existing Classrooms
	New Multi-Use / Library
	Existing Multi-Use
	New Admin
	Existing Admin
	New Support
	Existing Support



Lower Level Plan

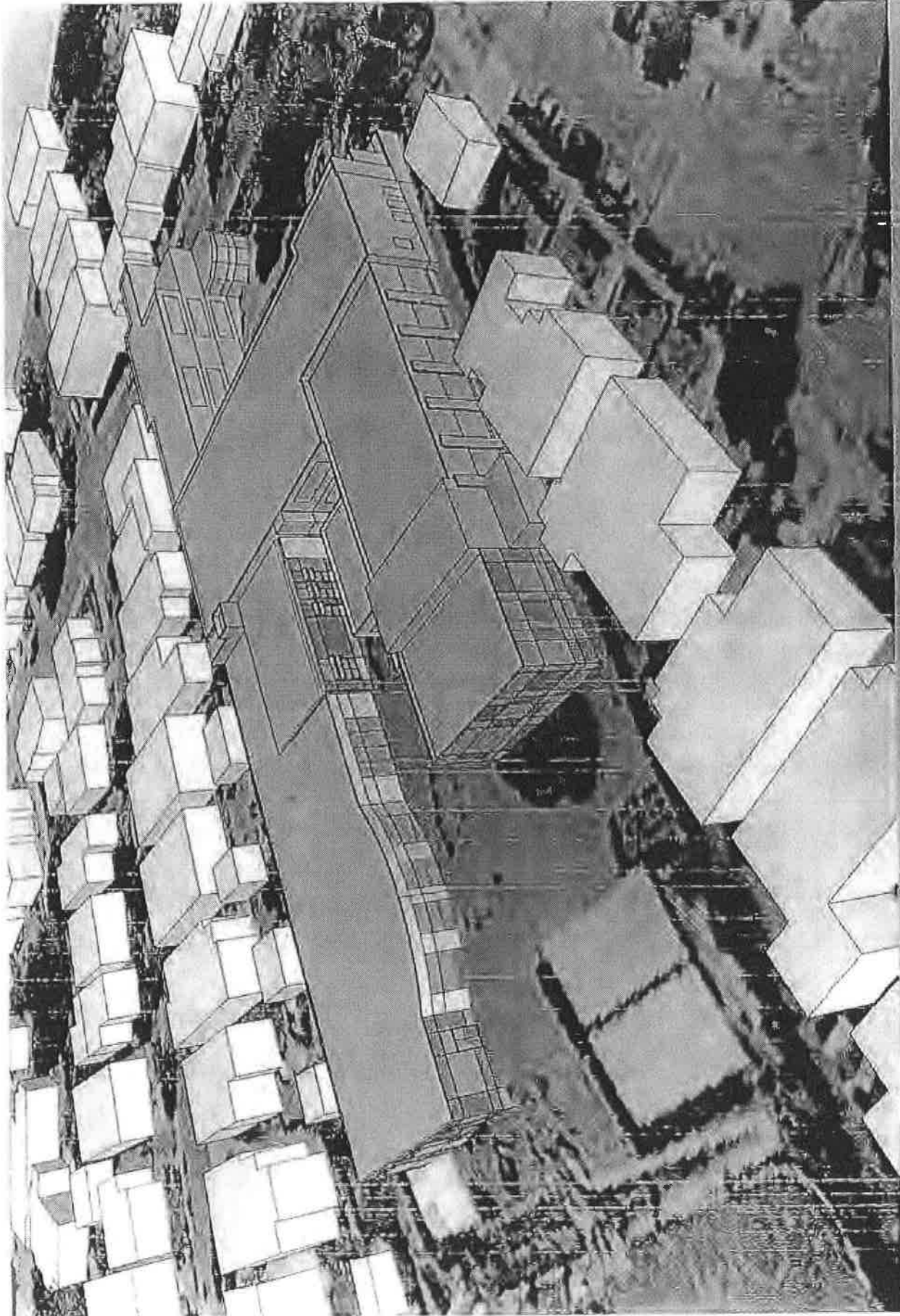




Second Floor Plan

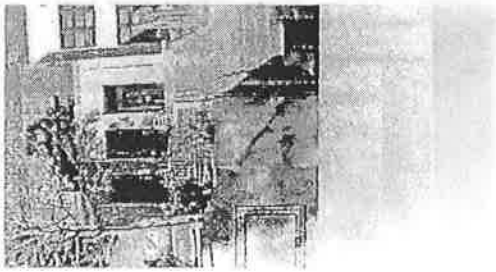
USAGE KEY	
	New Classrooms
	Existing Classrooms
	New Multi-Use / Library
	Existing Multi-Use
	New Admin
	Existing Admin
	New Support
	Existing Support





MODERNIZATION / ADDITION OPTION

HEIT



# MODERNIZATION/ADDITION OPTION

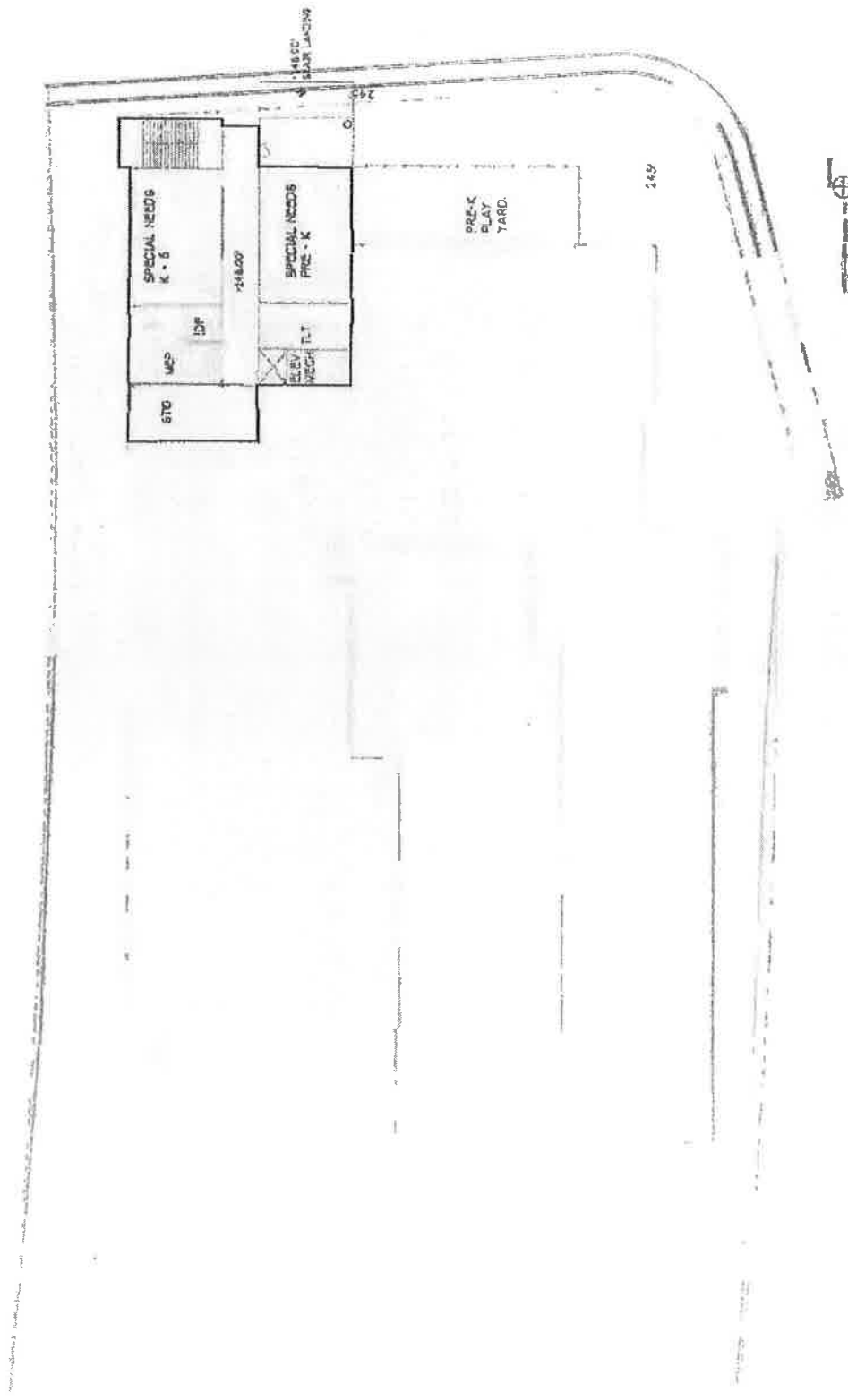
Total Cost: \$20.4 Million

Addition Cost: \$8.4 Million

Seismic/Access Cost: \$10.7 Million

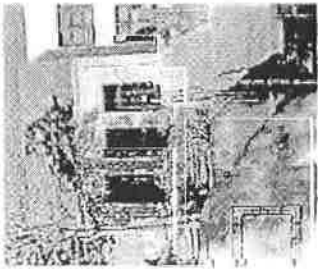
## Deficiencies:

- Undersized Classroom
- Poor site circulation and continuity within the building
- Campus Zoning Issues:
  - Split Administration
  - Location of Kitchen and Delivery Route
  - Multi-Use configuration
  - Library at Interior Court
  - Kindergarten Yard at Front of Campus



LOWER LEVEL





# ALL NEW CONSTRUCTION OPTION

Cost = \$26 Million

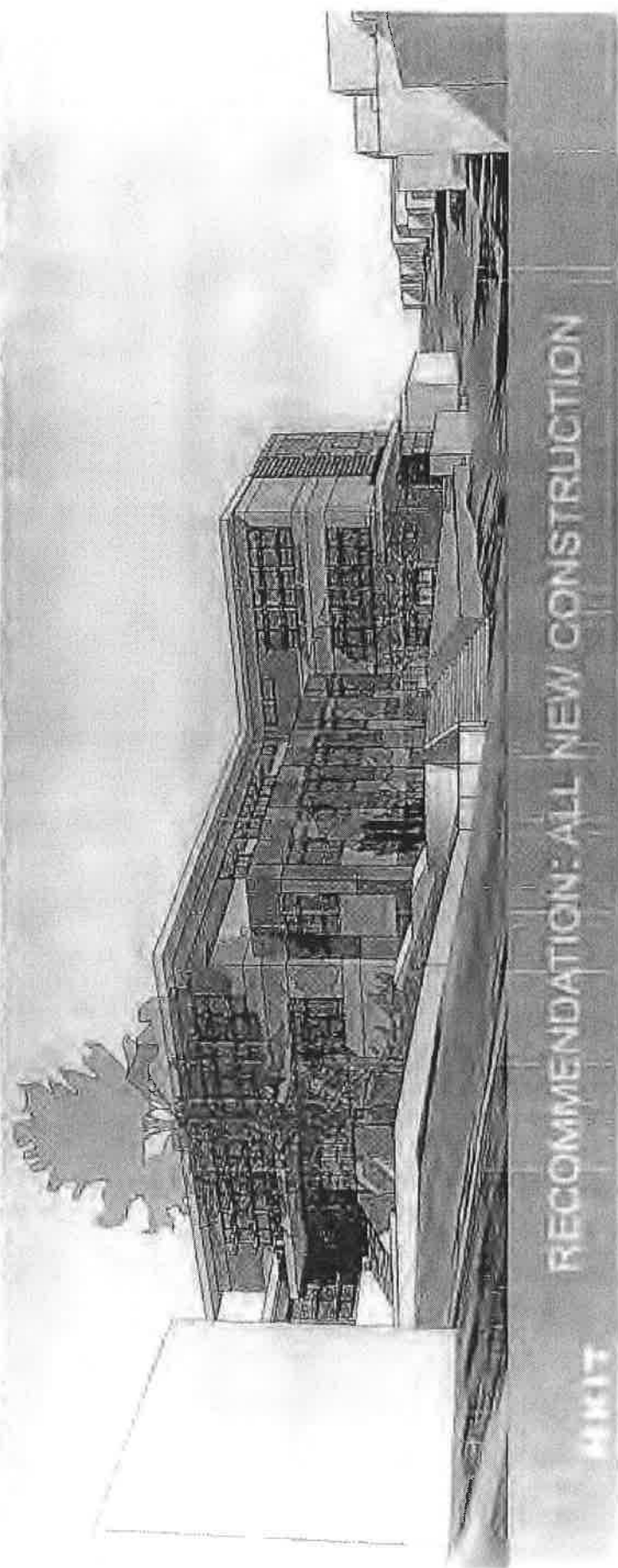
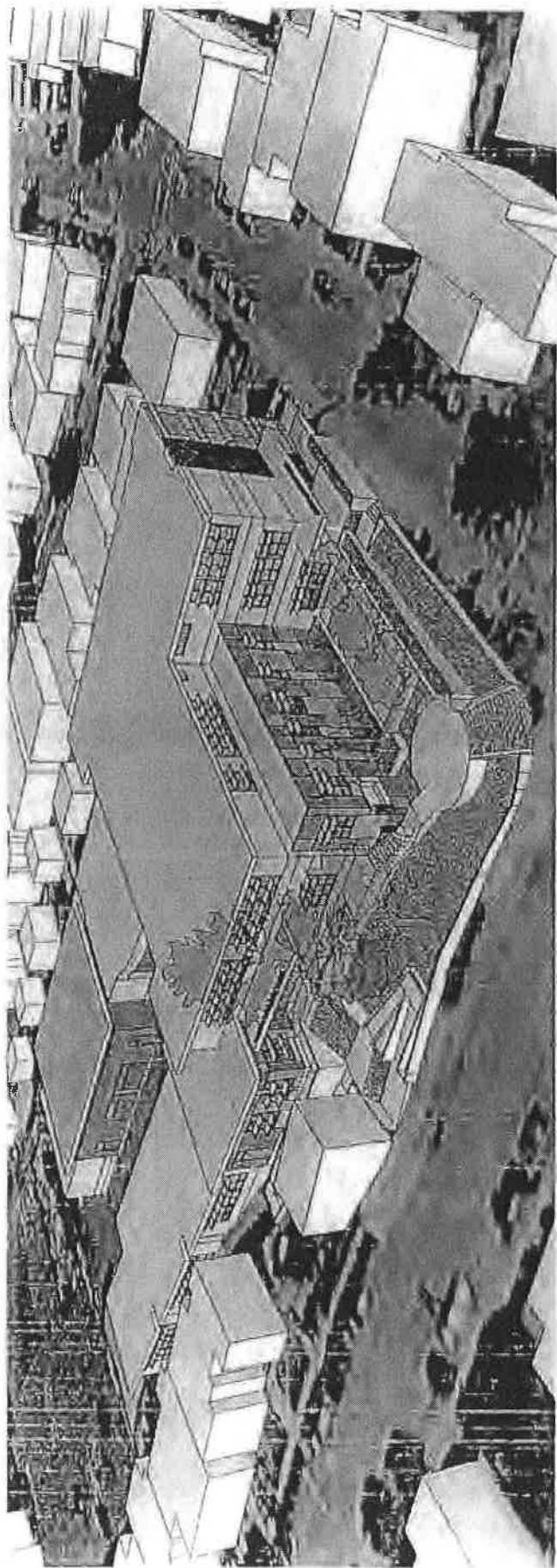
(\$5.5M more than Modernization Option)

## Advantages:

- Classroom Size
- Campus Zoning:
  - Contiguous Administration
  - Library Location at Main Entrance
  - Kindergarten at Courtyard
  - Location of Multi-Use/Kitchen and Delivery Route
- Full ADA Access and Equal Facilitation
- Net-Zero
- Remains the Icon for Neighborhood



ALL NEW CONSTRUCTION SUMMARY



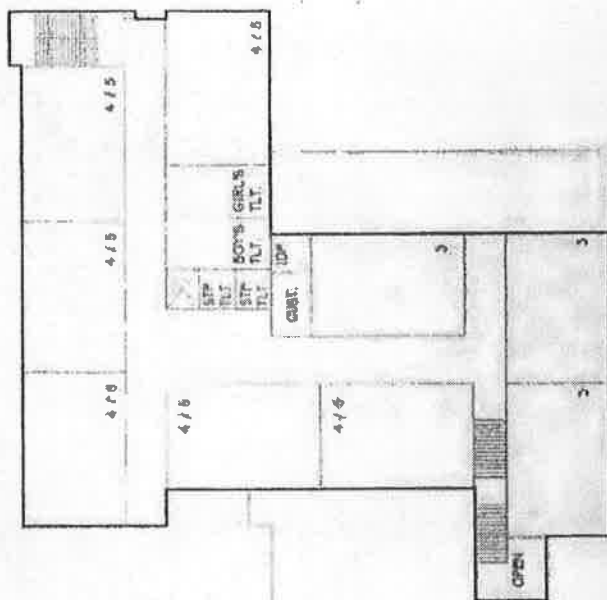


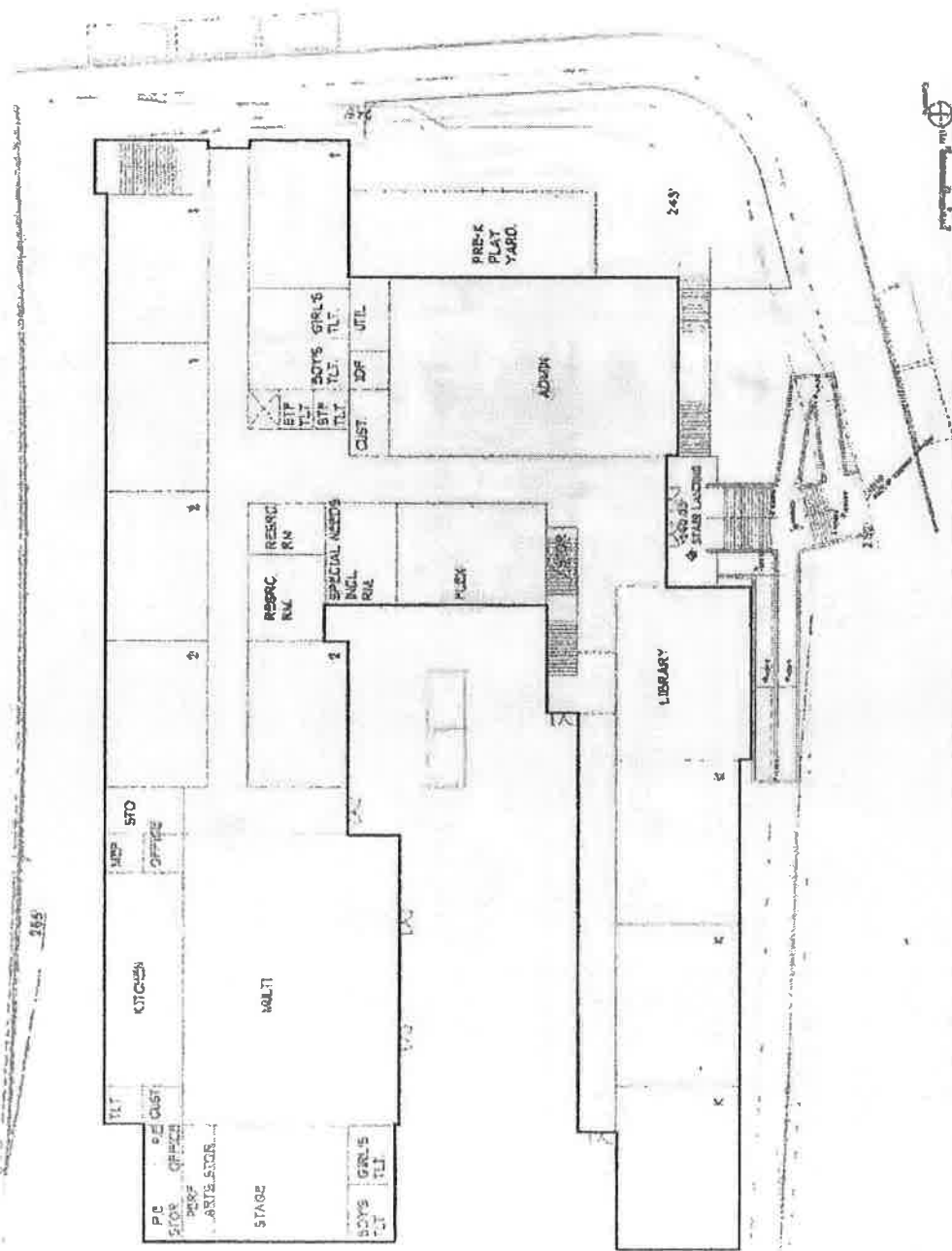
RECOMMENDATION: ALL NEW CONSTRUCTION

HKIT

**RECOMMENDATION: ALL NEW CONSTRUCTION**

1



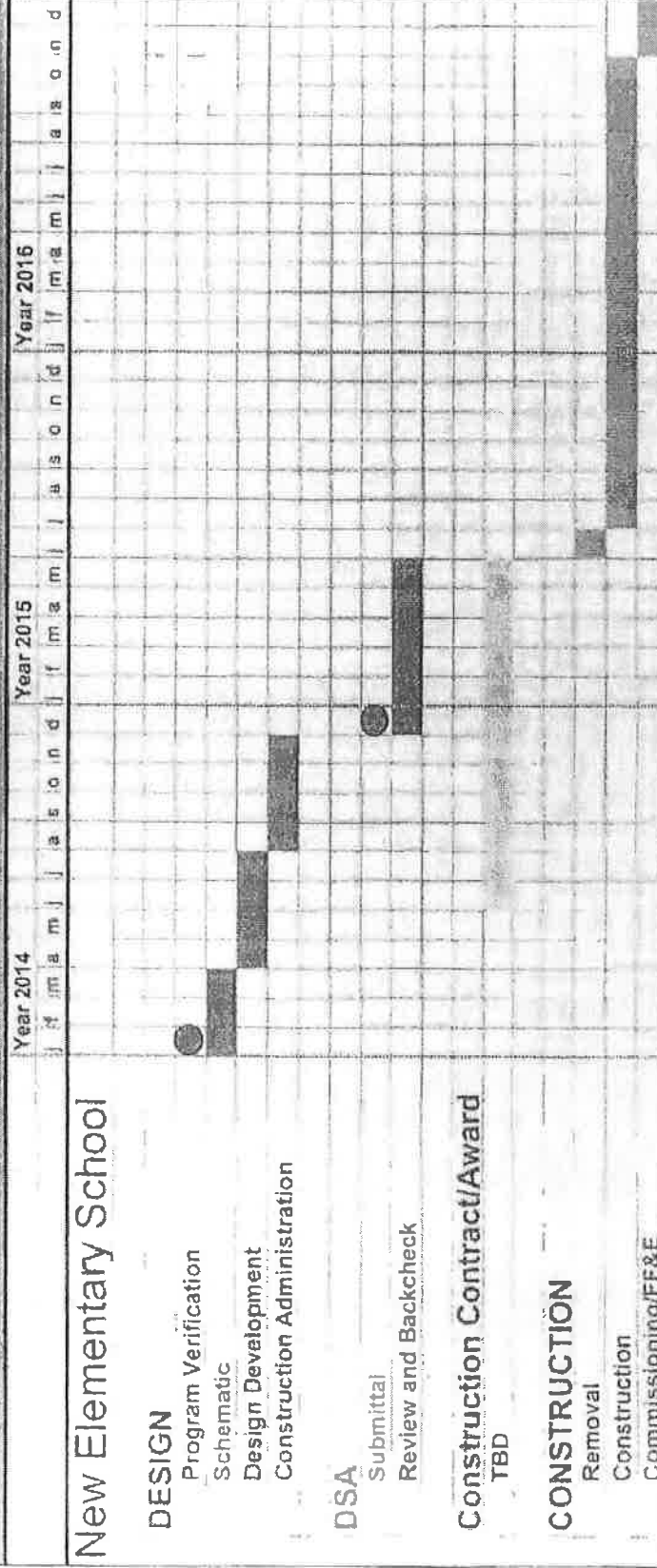


MAIN LEVEL

## RECOMMENDATION: ALL NEW CONSTRUCTION



# OUSD - Glenview Elementary School



PROJECT SCHEDULE

## AGREEMENT FOR ARCHITECTURAL SERVICES ROUTING FORM

Project Information			
Project Name	Glenview Renovation	Site	119
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	HKIT Architects	Agency's Contact	Dara A. Youngdale				
OUSD Vendor ID #	V022233	Title	Architect of Record				
Street Address	538 Ninth Street, Suite 240	City	Oakland	State	CA	Zip	94607
Telephone	510-625-9800	Policy Expires	8-28-2014				
Contractor History	Previously been an OUSD contractor? x Yes <input type="checkbox"/> No		Worked as an OUSD employee? <input type="checkbox"/> Yes x No				
OUSD Project #	13134						

Term			
Date Work Will Begin	2-26-2014	Date Work Will End By (not more than 5 years from start date)	2-26-2019

Compensation			
Total Contract Amount	\$	Total Contract Not To Exceed	\$2,724,900.00
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 before completing requisition.				
Resource #	Funding Source	Org Key	Object Code	Amount
9350	Measure J Fund 21	1199905890	6215	\$2,724,900.00

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	Charles Love	Phone	510-535-8038	Fax 510-535-7082
	Director, Facilities Planning and Management				
	Signature			Date Approved	2/4/14
2.	General Counsel, Department of Facilities Planning and Management				
	Signature			Date Approved	2/5/14
	Associate Superintendent, Facilities Planning and Management				
3.	Signature			Date Approved	
	Deputy Superintendent, Business Operations				
4.					
	President, Board of Education				
5.	Signature			Date Approved	

Board Office Use: Legislative File Info.	
File ID Number	14-0300
Committee	Facilities
Introduction Date	2-26-2014
Enactment Number	14-0334
Enactment Date	2-26-14



**OAKLAND UNIFIED  
SCHOOL DISTRICT**

*Community Schools, Thriving Students*

## Memo

**To** Board of Education

**From** Dr. Gary, Ed.D., Acting Superintendent and Secretary, Board of Education  
By: Vernon Hal, Deputy Superintendent, Business Operations *VH*  
Timothy White, Associate Superintendent, Facilities Planning and Management

**Board Meeting Date** February 26, 2014

**Subject** Agreement for Architectural Services - HKIT Architects - Glenview Renovation Project

**Action Requested** Approval by the Board of Education of an Agreement for Architectural Services with HKIT Architects for Architect and Engineering Services on behalf of the District at Glenview Renovation Project, in an amount not-to exceed \$2,724,900.00. The term of this Agreement shall commence on February 26, 2014 and shall conclude no later than February 26, 2019.

**Background** HKIT Architects to provide the design of all new K-5 elementary school and related site improvements on the existing Glenview Elementary School site.

**Local Business Participation Percentage** 100.00%

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

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





## OAKLAND UNIFIED SCHOOL DISTRICT

*Community Schools, Thriving Students*

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planned approach is intended to ensure safety, cleanliness, and orderliness for

all individuals participating in the learning process.

The basic facility needs of students such as proper lighting, functional roofs, noise control and well maintained buildings, not only convey the message that

we value our students and teachers but may foster a sense of school pride and community ownership which may improve attitudes towards learning. The implementation of the Facilities Master Plan is our first step in that direction.

### Recommendation

Approval by the Board of Education of an Agreement for Architectural Services with HKIT Architects for Architect and Engineering Services on behalf of the District at Glenview Renovation Project, in an amount not-to exceed \$2,724,900.00. The term of this Agreement shall commence on February 26, 2014 and shall conclude no later than February 26, 2019.

### Fiscal Impact

Measure J Fund 21

### Attachments

- Agreement for Architectural Services including scope of work
- Certificate of Insurance



HKIT ARCHITECTS

## EXHIBIT A

Mr. Tadashi Nakadegawa, Director of Facilities  
Oakland Unified School District

January 22, 2014

Page No. 2.

DSA approvals package, and one continuous phase of construction. The District may bid the project as a traditional design/bid/build or contract with a lease/leaseback contractor.

### PROPOSED CONTRACT INCLUDING REIMBURSABLE EXPENSES AND BOUNDARY AND TOPOGRAPHIC SURVEY

As per the District Contract, we propose working on a total Fee Basis of Two Million, Seven Hundred and Twenty-Four Thousand, Nine Hundred and 00/100 Dollars (\$2,724,900.00).

As per the District Contract, we will bill reimbursable expenses at our cost with an estimated allowance noted below. The Boundary and Topographic Survey will be included in our overall contract fees and billed as a direct expense to the District.

• Base Professional Services	\$ 2,184,000.00
• Owner's 10% Design Contingency	\$ 218,400.00
Sub-Total	\$2,402,400.00
• Interim Housing Design and Documentation Allowance	\$ 260,000.00
• Reimbursable Expenses Allowance	\$ 50,000.00
• Boundary and Topographic Survey	\$ 12,500.00
Total	\$2,724,900.00

### EXCLUSIONS

Project scope and services exclude:

- Temporary Housing (On-site Relocatable Building) Design Development and Documentation
- Seismic Analysis of Existing Buildings
- LEED Documentation/Fundamental Commissioning & Enhanced Commissioning
- SWPPP

Should you have any questions or comments please do not hesitate to call. We look forward to continuing our work with the District and the Glenview Elementary School site staff and community.

Very truly yours,

HKIT ARCHITECTS

Dana A. Youngblood, FAIA  
Principal

Thomas C. Bruning, FAIA  
Principal

DAY/nmh

cc. Cesar Monterrosa, Facilities Coordinator, Oakland Unified School District  
Joseph Cavanagh, Bond Director, SGI Construction Management  
Victor Manansala, Design Manager, SGI Construction Management



HKIT ARCHITECTS

## EXHIBIT A

538 NINTH STREET SUITE 240 • OAKLAND, CALIFORNIA 94607 T 510 625 9800 • F 510 625 9801 • WWW.HKIT.COM • A CALIFORNIA CORPORATION

November 14, 2013

Revised: January 8, 2014

Revised: January 22, 2014

Mr. Tadashi Nakadegawa  
Director of Facilities  
Oakland Unified School District  
955 High Street  
Oakland, California 94601

Reference: Glenview Elementary School – New School Project  
Oakland Unified School District  
HKIT #10202

Dear Mr. Nakadegawa:

HKIT Architects is pleased to provide the following proposal for services for the design of an all new K-5 elementary school and related site improvements on the existing Glenview Elementary School site. The new construction scope as defined in our Master Plan Report includes 53,700 sf (+/-) of one- and two-story building structures, a partial basement area, and extensive on-site improvements. The existing permanent structures, portable buildings and much of the existing site improvements will be removed as a part of the project scope. The estimated construction budget is \$25,955,113.00 plus \$880,690.00 for photovoltaic panels resulting in a total estimated construction budget of \$26,835,803.00. Project goals are to follow CHPS design guidelines and to achieve Net-Zero classification.

Our proposed scope of services includes architectural design services, structural engineering, mechanical/electrical/plumbing engineering, photovoltaic design, civil engineering, landscape design, fire alarm/intrusion alarm design, food services and cost estimating services. Our services include program and conceptual design verification and refinement, full design development and documentation, the DSA approvals process, construction administration and closeout services in addition to daylight modeling and energy use modeling. The construction documents will be produced in Revit.

Our scope of services includes design services related to on-site or off-site interim housing, work which began during the master planning phase. Options may include the installation of on-site relocatable classrooms to house some or all of the student body, the development of an off-site relocatable complex on another school property or the use of an existing school campus. HKIT will design options and then provide design development and construction documentation for the selected scheme. We have provided an allowance for these services as a part of our proposal.

Design work is scheduled to begin in February 2014 and construction documents are scheduled to be submitted to DSA in February 2015. Construction is scheduled to start in August 2015 and last approximately 19 months with an estimated completion date of February 2017. Our proposed services are based on one set of construction documents, one

### PRINCIPALS

THOMAS C. BRUTTING AIA  
RICHARD CALDWELL AIA  
DENNIS I. OKAMURA AIA LEED AP  
DARA A. YOUNGDALE AIA LEED AP

### DIRECTOR OF DESIGN

ROD HENMI AIA LEED AP NOMA

### SENIOR ASSOCIATES

TAD SEKINO  
DANIEL KALLENBACH AIA LEED AP  
ERWIN WON LEED AP

### ASSOCIATES

JOHN FRANDO AIA LEED AP  
FELIX HUNZIKER  
PAUL H. B. MCLEWEE AIA LEED AP  
JASON A.D. SHIRRIFF AIA LEED AP  
CHUCK WONG

**AGREEMENT FOR ARCHITECTURAL SERVICES**

**OAKLAND UNIFIED SCHOOL DISTRICT**

**WITH**

**HKIT ARCHITECTS**

**FOR**

**GLENVIEW ELEMENATY SCHOOL RENOVATION PROJECT**

**JANUARY 24, 2014**

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## AGREEMENT FOR ARCHITECTURAL SERVICES

This Agreement for Architectural Services is made as of January 24, 2014, between the Oakland Unified School District, a California public school district, ("District") and HKIT Architects ("Architect") (both collectively "Parties"), for the following project ("Project"):

That for and in consideration of the mutual covenants herein contained, the Parties hereto agree as follows:

### Article 1. Definitions

- 1.1. In addition to the definitions above, the following definitions for words or phrases shall apply when used in this Agreement, including all Exhibits:
  - 1.1.1. **Agreement:** The Agreement consists exclusively of this document and all identified exhibits attached and incorporated by reference.
  - 1.1.2. **Architect:** The architect listed in the first paragraph of this Agreement, including all Consultants to the Architect.
  - 1.1.3. **As-Built Drawings ("As-Built's"):** Any document prepared and submitted by District contractor(s) that details on a Conforming Set, the actual construction performed during the Project, including changes necessitated by change orders.
  - 1.1.4. **Bid Set:** The plans, drawings, and specifications at the end of the Construction Documents Phase that the Division of the State Architect ("DSA") has approved and that the District can use to go out to bid for construction of the Project.
  - 1.1.5. **Conforming Set:** The plans, drawings, and specifications at the end of the Bidding Phase that incorporate all addenda, if any, issued during the Bidding Phase. The Architect shall ensure that DSA has approved all revisions to the Bid Set that are incorporated onto the Conforming Set and for which DSA approval is required.
  - 1.1.6. **Construction Budget:** The total amount indicated by the District for the entire Project plus all other costs, including design, construction, administration, financing, and all other costs.
  - 1.1.7. **Construction Cost Budget:** The total cost to District of all elements of the Project designed or specified by the Architect, as adjusted at the end of each design phase in accordance with this Agreement. The Construction Cost Budget does not include the compensation of the Architect and the Architect's consultants, the cost of the land, rights-of-way, financing or other costs which are the responsibility of the District, including

AGREEMENT FOR ARCHITECTURAL SERVICES

OAKLAND UNIFIED SCHOOL DISTRICT

construction management.

1.1.8. **Consultant(s)**: Any and all consultant(s), sub-consultant(s), subcontractor(s), or agent(s) to the Architect.

1.1.9. **District**: The Oakland Unified School District.

1.1.10. **DSA**: The Division of the State Architect.

1.1.11. **Record Drawings**: A final set of drawings prepared by the Architect that incorporates all changes from all As-Builts, sketches, details, and clarifications.

1.1.12. **Service(s)**: All labor, materials, supervision, services, tasks, and work that the Architect is required to perform and that are required by, or reasonably inferred from, the Agreement, and that are necessary for the design and completion of the Project.

1.1.13. **Visually Verify**: To verify to the fullest extent possible by physical inspection and reasonable investigation and without any destructive action.

## **Article 2. Scope, Responsibilities, And Services Of Architect**

2.1. Architect shall render the Services as described in **Exhibit "A,"** commencing with receipt of a written Notice to Proceed signed by the District representative. Architect's Services will be completed in accordance with the schedule attached as **Exhibit "C."**

2.2. Architect shall provide Services that shall comply with professional architectural standards including the standard of care applicable to architects designing public school facilities and applicable requirements of federal, state, and local law, including, but not limited to, the requirements of the California Business and Professions Code, the California Education Code, the California Code of Regulations, including the California Green Building Standards Code, effective 01/01/2011, and other amendments. All persons providing professional services hereunder shall be properly licensed as required by California law.

2.3. The District intends to award the Project to contractor(s) pursuant to a competitive bid process and a construction manager and/or contractor(s) may provide input to the Architect on the constructability and design features of the Project.

2.4. Architect acknowledges that all California public school districts are now or will soon be obligated to develop and implement the following storm water requirements, without limitation:

2.4.1. A municipal Separate Storm Sewer System (MS4). An MS4 is a system of conveyances used to collect and/or convey storm water, including, without limitation, catch basins, curbs,



gutters, ditches, man-made channels, and storm drains.

2.4.2. A Storm Water Pollution Prevention Plan (SWPPP) at:

2.4.2.1. Sites where the District engages in maintenance (e.g., fueling, cleaning, repairing) of transportation activities.

2.4.2.2. Construction sites where:

2.4.2.2.1. one (1) or more acres of soil will be disturbed, or

2.4.2.2.2. the project is part of a larger common plan of development that disturbs more than one (1) or more acres of soil,

2.4.3. Architect shall conform its design work to the District's storm water requirements indicated above, that are approved by the District and applicable to the Project, at no additional cost to the District. In addition, as required, Architect shall develop a grading and drainage plan and a site plan from architectural information showing a final development of the site. This drawing will also include a horizontal and vertical control plan and a utility infrastructure plan. The Services described in this Subparagraph shall be provided by a professional civil engineer who contracts with or is an employee of the Architect.

2.5. Architect shall contract for or employ at Architect's expense, consultant(s) to the extent deemed necessary for completion of the Project including, but not limited to, architects, mechanical, electrical, structural, civil engineers, landscapers, and interior designers, licensed as such by the State of California as part of the basic services under this agreement. The names of consultant(s) shall be submitted to the District for approval prior to commencement of Services, as indicated below. The District reserves the right to reject the Architect's use of any particular consultant. Nothing in the foregoing procedure shall create any contractual relationship between the District and any consultant employed by the Architect under terms of the Agreement. Architect shall require each of the consultants retained by it to execute agreements with the standard of care and indemnity provisions commensurate with this Agreement, but Architect shall remain solely responsible and liable to District for all matters covered by this Agreement.

2.6. Architect shall coordinate with District personnel or its designated representatives as may be requested and desirable, including with other professionals employed by the District for the design, coordination or management of other work related to the Project. This shall include, without limitation, coordination with the persons responsible for operation of the District's Labor Compliance Program, if any. If the Architect employs consultant(s), the Architect shall ensure

that its contract(s) with its consultant(s) include language notifying the consultant(s) of the District's Labor Compliance Program, if any.

- 2.7. Architect shall identify the regulatory agencies that have jurisdiction over essential building and design elements and coordinate with and implement the requirements of the regulatory agencies, including, without limitation, the California Department of Education (CDE), the Office of Public School Construction (OPSC), the Department of General Services (DGS), DSA Fire/Life Safety, DSA Access Compliance Section, DSA Structural Safety Section, State Fire Marshal and any regulatory office or agency that has authority for review and supervision of school district construction projects.
- 2.8. Architect shall provide Services required to obtain any local agencies' approval for off-site work related to the Project including review by regulatory agencies having jurisdiction over the Project.
- 2.9. Architect shall coordinate with the District's DSA Project Inspector(s).
- 2.10. Architect shall give efficient supervision to Services, using its best skill and attention. Architect shall carefully study and compare all Contract Documents, Drawings, Specifications, and other instructions and shall at once report to District, Construction Manager, and Contractor, any error, inconsistency, or omission that Architect or its employees may discover, in writing, with a copy to District's Project Inspector(s). Architect shall have responsibility for discovery of errors, inconsistencies, or omissions.
- 2.11. Architect recognizes that the District may obtain the services of a Construction Manager and that Architect may have to assume certain coordination and management responsibilities, including tracking RFI's, providing RFI responses, and leading all coordination meetings between the District, Project Inspectors, and contractors on each of the Projects. The District reserves the right to retain the services of a Program Manager or Construction Manager or both at any time. The Construction Manager, if any, shall be authorized to give Architect Services authorizations and issue written approvals and Notices to Proceed on behalf of District. The District reserves the right to designate a different Construction Manager at any time. Any task, including, but not limited to, reviews or approvals that the District may perform pursuant to this Agreement may be performed by the Construction Manager, unless that task indicates it shall be performed by the governing board of the District. In addition, the District may have the Program Manager or Construction Manager perform a constructability review of Architect's design documents. Architect shall conform any design documents to the constructability review as part of the Services under this Agreement and shall not be entitled to any compensation as Extra Services for this activity.

- 2.12. Architect shall provide computer-generated pictures downloaded to computer files, updated as requested by the District, that the District may use on its website.
- 2.13. As part of the basic Services pursuant to this Agreement, Architect is not responsible for:
- 2.13.1. Ground contamination or hazardous material analysis.
  - 2.13.2. Any asbestos and/or lead testing, design or abatement; however, it shall coordinate and integrate its work with any such information provided by District.
  - 2.13.3. Compliance with the California Environmental Quality Act ("CEQA"), except that Architect agrees to coordinate its work with that of any CEQA consultants retained by the District, to provide current elevations and schematic drawings for use in CEQA compliance documents, and to incorporate any mitigation measures adopted by the District into the Project design at no additional cost to the District.
  - 2.13.4. Historical significance report.
  - 2.13.5. Soils investigation.
  - 2.13.6. Geotechnical hazard report, except as indicated in Exhibit "A."

**Article 3. Architect Staff**

- 3.1. The Architect has been selected to perform the Services herein because of the skills and expertise of key individuals.
- 3.2. The Architect agrees that the following key people in Architect's firm shall be associated with the Project in the following capacities [All blanks below must be filled in by Architect and approved by District]:

Principal In Charge: HKIT Architects (Dara Youngdale)

Project Director: HKIT Architects (Rod Henmi)

Project Architect(s): HKIT Architects (Jeff Evans)

Project Architect(s): HKIT Architects (Richard Ziegler)

Major Consultants:

MEP: Integral Group (Shannon Allison, Tyler Bradshaw, Darryl Singleton)

Civil: Ackland International, Inc. (Ekundayo Sowonmi)

Structural: RP Gallagher (Ronald Gallagher)

Food Service: Berlin Foods (Robert Colburn)

Fire Protection: AON Fire Protection Engineering Corp. (Manuelita David)

Landscape: Keller Mitchell & Co. (Jacque Keller)

AGREEMENT FOR ARCHITECTURAL SERVICES

OAKLAND UNIFIED SCHOOL DISTRICT

- 3.3. The Architect shall not change any of the key personnel listed above without prior written approval by District, unless said personnel cease to be employed by Architect. In either case, District shall be allowed to interview and approve replacement personnel.
- 3.4. If any designated lead or key person fails to perform to the satisfaction of the District, then upon written notice the Architect shall have five (5) days to remove that person from the Project and replace that person with one acceptable to the District. All lead or key personnel for any consultant must also be designated by the consultant and are subject to all conditions previously stated in this paragraph.
- 3.5. Architect represents that the Architect has no existing interest and will not acquire any interest, direct or indirect, which could conflict in any manner or degree with the performance of Services required under this Agreement and that no person having any such interest shall be employed by Architect.
- 3.6. Architect shall comply with Education Code Section 17302(a) and agrees that any plans and/or specifications included in the Services shall be prepared under the supervision of licensed personnel, and that licensed personnel shall be in "responsible charge" of persons who observe the construction.

**Article 4. Schedule Of Services**

The Architect shall commence Services under this Agreement upon receipt of a Notice to Proceed and shall prosecute the Services diligently as described in Exhibit "A," so as to proceed with and complete the Services in compliance with the schedule in Exhibit "C." Time is of the essence and failure of Architect to perform Services on time as specified in this Agreement is a material breach of this Agreement. It shall not be a material breach if a delay is beyond the Architect's or its consultant(s)' reasonable control.

**Article 5. Construction Cost Budget**

- 5.1. Architect hereby accepts the District's established Construction Cost Budget and Project scope. In accordance with the Exhibit "A," the Architect shall have responsibility to further develop, review, and reconcile the Construction Cost Budget for the District at the beginning of the Project and at the completion of each design phase. The District and the Construction Manager shall also have responsibility to develop, review, and reconcile the Construction Cost Budget with the Architect.
- 5.2. Architect shall complete all Services as described in Exhibit "A," including all plans, designs, drawings, specifications and other construction documents, so that the cost to construct the work designed by the Architect will not exceed the Construction Cost Budget, as adjusted subsequently with the District's written approval. The Architect shall maintain cost controls throughout the Project to deliver the Project within the Construction Cost Budget.

5.3. If any of the following events occur:

5.3.1. The lowest responsive base bid received is in excess of five percent (5%) of the Construction Cost Budget, or

5.3.2. If the combined total of base bid and all additive alternates come in ten percent (10%) or more under the Construction Cost Budget, or

5.3.3. If the Construction Cost Budget increases in phases subsequent to the Schematic Design Phase due to reasonably foreseeable changes in the condition of the construction market in the county in which the District is located, in so far as these have not been caused by Acts of God, earthquakes, strikes, war, or energy shortages due to uncontrollable events in the world economy, then the District, in its sole discretion, has one or a combination of the following alternatives:

5.3.2.1. Give the Architect written approval on an agreed adjustment to the Construction Cost Budget.

5.3.2.2. Authorize the Architect to re-negotiate, when appropriate, and/or re-bid the Project within three (3) months time of receipt of bids (exclusive of District and other agencies' review time) at no additional cost to the District.

5.3.2.3. Terminate this Agreement if the Project is abandoned by the District, without further obligation by either party.

5.3.2.4. Within three (3) months time of receipt of bids, instruct Architect to revise the drawings and specifications (in scope and quality as approved by the District) to bring the Project within the Construction Cost Budget for re-bidding at no additional cost to the District.

#### **Article 6. Fee And Method Of Payment**

6.1. District shall pay Architect for all Services contracted for under this Agreement an amount equal to the following ("Fee"):

An amount equal to Two million, seven hundred twenty-four thousand, nine hundred dollars and no cents (\$2,724,900.00 ).  
]

6.2. District shall pay Architect the Fee pursuant to the provisions of Exhibit "D."

6.3. Architect shall bill its work under this Agreement in accordance with

AGREEMENT FOR ARCHITECTURAL SERVICES

OAKLAND UNIFIED SCHOOL DISTRICT

#### **Exhibit "D."**

- 6.4. No increase in Fee will be due from change orders generated during the construction period to the extent caused by Architect's error or omission.
- 6.5. The Architect's Fee set forth in this Agreement shall be full compensation for all of Architect's Services incurred in the performance hereof as indicated in **Exhibit "D."**
- 6.6. Regardless of the structure of Architect's Fee, the Architect's Fee may be adjusted downward if the Scope of Services of this Agreement is reduced by the District in accordance with this Agreement.

#### **Payment For Extra Services Or Changes**

District-authorized services outside of the scope in **Exhibit "A"** or District-authorized reimbursables not included in Architect's fee are "Extra Services." Any charges for Extra Services shall be paid by the District as described in **Exhibit "B"** only upon certification that the claimed Extra Services was authorized as indicated herein and that the Extra Services have been satisfactorily completed. If any service is done by Architect without prior written authorization by the Construction Manager or the District's authorized representative, the District will not be obligated to pay for such service. The foregoing provision notwithstanding, the Architect will be paid by the District as described in **Exhibit "B"** for Extra Services that the Construction Manager or the District's authorized representative verbally requests, provided that the Architect confirms such request in writing pursuant to the notice requirements of this Agreement, and proceeds with such Extra Services not earlier than two business days after the District receives confirmation of the request from the Architect.

#### **Article 7. Ownership Of Data**

- 7.1. Pursuant to Education Code section 17316, this Agreement creates a non-exclusive and perpetual license for District to use, at its discretion, all plans, including, but not limited to, record drawings, specifications, and estimates that the Architect or its consultants, prepares or causes to be prepared pursuant to this Agreement.
- 7.2. The Architect retains all rights to all copyrights, designs and other intellectual property embodied in the plans, record drawings, specifications, estimates, and other documents that the Architect or its consultants prepares or causes to be prepared pursuant to this Agreement.
- 7.3. The Architect shall perform the Services and prepare all documents under this Agreement with the assistance of Computer Aided Design Drafting (CADD) (e.g., AutoCAD) Technology. The Architect shall deliver to the District, on request, the tape and/or compact disc format and the name of the supplier of the software/hardware necessary to use the design file. As to any drawings that Architect provides in a

CADD file format, the District acknowledges that anomalies and errors may be introduced into data when it is transferred or used in a computer environment, and that the District should rely on hard copies of all documents.

- 7.4. In order to document exactly what CADD information was given to the District, Architect and District shall each sign a "hard" copy of reproducible documents that depict the information at the time Architect produces the CADD information. District agrees to release Architect from all liability, damages, and/or claims that arise due to any changes made to this information by anyone other than the Architect or Consultant(s) subsequent to it being given to the District.
- 7.5. Following the termination of this Agreement, for any reason whatsoever, the Architect shall promptly deliver to the District upon written request and at no cost to the District the following items (hereinafter "Instruments of Service") which the District shall have the right to utilize in any way permitted by statute:
  - 7.5.1. One set of the Contract Documents, including the bidding requirements, specifications, and all existing cost estimates for the Project, in hard copy, reproducible format.
  - 7.5.2. One set of fixed image CADD files in DXF format of the drawings that are part of the Contract Documents.
  - 7.5.3. One set of non-fixed image CADD drawing files in DXF or DWG or both format of the site plan, floor plans (architectural, plumbing, structural mechanical and electrical), roof plan, sections and exterior elevations of the Project.
  - 7.5.4. All finished or unfinished documents, studies, reports, calculations, drawings, maps, models, photographs, technology data and reports prepared by the Architect under this Agreement.
  - 7.5.5. The obligation of Section 8.5 of this Agreement shall survive the termination of this Agreement for any reason whatsoever.
- 7.6. In the event the District changes or uses any fully or partially completed documents without the Architect's knowledge or participation or both, the District agrees to release Architect of responsibility for such changes, and shall indemnify, defend and hold the Architect, harmless from and against any and all claims, liabilities, suits, demands, losses, costs and expenses, including, but not limited to, reasonable attorneys' fees, on account of any damages or losses to property or persons, including injuries or death, or economic losses, arising out of that change or use except to the extent the Architect is found to be liable in a forum of competent jurisdiction. In the event District uses any fully or partially completed documents without the Architect's full involvement, the District shall remove all title blocks

and other information that might identify the Architect and the Architect's consultants.

#### **Article 8. Termination Of Contract**

- 8.1. If Architect fails to perform Architect's duties to the satisfaction of the District, or if Architect fails to fulfill in a timely and professional manner Architect's material obligations under this Agreement, or if Architect shall violate any of the material terms or provisions of this Agreement, the District shall have the right to terminate this Agreement, in whole or in part, effective immediately upon the District giving written notice thereof to the Architect. In the event of a termination pursuant to this subdivision, Architect may invoice District for all Services performed until the notice of termination, but District shall have the right to withhold payment and deduct any amounts equal to the District's costs because of Architect's actions, errors, or omissions that caused the District to terminate the Architect.
- 8.2. District shall have the right in its sole discretion to terminate the Agreement for its own convenience. In the event of a termination for convenience, Architect may invoice District and District shall pay all undisputed invoice(s) for Services performed until the District's notice of termination.
- 8.3. Except as indicated in this Article, termination shall have no effect upon any of the rights and obligations of the Parties arising out of any transaction occurring prior to the effective date of such termination.
- 8.4. The Architect has the right to terminate this Agreement if the District does not fulfill its material obligations under this Agreement. Such termination shall be effective after receipt of written notice from Architect to the District. Architect may invoice District and District shall pay all undisputed invoice(s) for Services performed until the Architect's notice of termination.
- 8.5. If, at any time in the progress of the Design of the Project, the governing board of the District determines that the Project should be terminated, the Architect, upon written notice from the District of such termination, shall immediately cease Services on the Project. The District shall pay the Architect only the fee associated with the Services provided, since the last invoice that has been paid and up to the notice of termination.
- 8.6. If the District suspends the Project for more than one hundred twenty (120) consecutive days, the Architect shall be compensated for Services performed prior to notice of that suspension. When the Project is resumed, the schedule shall be adjusted and the Architect's compensation shall be equitably adjusted to provide for expenses incurred in the resumption of the Architect's Services. If the District suspends the Project for more than two (2) years, the Architect may terminate this Agreement by giving written notice.



## **Article 9. Indemnity/Architect Liability**

### **9.1.**

To the furthest extent permitted by California law, Architect shall defend, indemnify, and hold free and harmless the District, its agents, representatives, officers, consultants, employees, trustees, and volunteers ("the indemnified parties") from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury of any kind, in law or equity ("Claim"), to property or persons, including personal injury and/or death, to the extent that any of the above arise out of, pertain to, or relate to, in whole or in part, the willful misconduct, recklessness, or negligent acts, errors, or omissions of Architect, its officials, officers, employees, subcontractors, consultants, or agents directly or indirectly arising out of, connected with, or resulting from the performance of the Services, the Project, or this Agreement, including without limitation the payment of all consequential damages.

9.2. Architect shall pay and satisfy any judgment, award or decree that may be rendered against the indemnified parties in any Claim. Architect shall also reimburse District for the cost of any settlement paid by District arising out of any Claim. Architect shall reimburse the indemnified parties for any and all legal expenses and costs, including expert witness fees and consultant fees, incurred by each of them in connection therewith or in enforcing the indemnity herein provided to the extent caused by the above agreement to indemnify. Architect's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by the indemnified parties. District shall have the right to accept or reject any legal representation that Architect proposes to defend the indemnified parties.

9.3. Any and all costs incurred by District, or for which District may reasonably become liable, to the extent caused by the negligence of Architect in its performance hereunder, including negligent delays, shall be paid by Architect to District or the District may withhold those costs from amounts owing to Architect.

## **Article 10. Fingerprinting**

Pursuant to Education Code section 45125.2, District has determined on the basis of scope of Services in this Agreement of this Project, that Architect, subcontractors, and their employees will have only limited contact with pupils at most. Architect shall promptly notify District in writing of any facts or circumstances which might reasonably lead District to determine that contact will be more than limited as defined by Education Code section 45125.1(d).

## **Article 11. Responsibilities Of The District**

11.1. The District shall examine the documents submitted by the Architect and shall render decisions so as to avoid unreasonable delay in the process of the Architect's Services.

- 11.2. The District shall verbally or in writing advise the Architect if the District becomes aware of any fault or defect in the Project, including any errors, omissions or inconsistencies in the Architect's documents. Failure to provide such notice shall not relieve Architect of its responsibility therefore, if any.
- 11.3. Unless the District and the Architect agree that a hazardous materials consultant shall be a consultant of the Architect, the District shall furnish the services of a hazardous material consultant or other consultants when such services are requested in writing by Architect and deemed necessary by the District or are requested by the District. These services shall include: asbestos and lead paint survey; abatement documentation; and specifications related to said matters which are to be incorporated into bid documents prepared by Architect. If the hazardous materials consultant is furnished by the District and not a consultant of the Architect, the specifications shall include a note to the effect that they are included in the Architect's bid documents for the District's convenience and have not been prepared or reviewed by the Architect. The note shall also direct questions about the specifications to its preparer.

**Article 12. Liability Of District**

- 12.1. Other than as provided in this Agreement, District's 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 District 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.
- 12.2. District shall not be responsible for any damage to persons or property as a result of the use, misuse or failure of any equipment used by Architect, or by its employees, even though such equipment be furnished or loaned to Architect by District.

**Article 13. Nondiscrimination**

- 13.1. Architect agrees that no discrimination shall be made in the employment of persons under this Agreement because of the race, national origin, ancestry, religion, age, physical or mental disability, sex, or sexual orientation of such person.
- 13.2. Architect shall comply with any and all applicable regulations and laws governing nondiscrimination in employment.

**Article 14. Insurance**

- 14.1. Architect shall comply with the insurance requirements for this Agreement, set forth in Exhibit "E."

- 14.2. Architect shall provide certificates of insurance and endorsements to District prior to commencement of the work of this Agreement as required in Exhibit "E."

**Article 15. Covenant Against Contingent Fees**

Architect warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the Architect, to solicit or secure this Agreement, and that it has not paid or agreed to pay any company or person, other than a bona fide employee working solely for the Architect, any fee, commission, percentage, brokerage fee, gift, or any other consideration contingent on or resulting from the award or making of this Agreement. For breach or violation of this warranty, the District shall have the right to annul this Agreement without liability, or in its discretion, to deduct from the contract price or consideration or to recover the full amount of such fee, commission, percentage fee, gift, or contingency.

**Article 16. Entire Agreement/Modification**

This Agreement, including the Exhibits hereto, supersedes all previous contracts and constitutes the entire understanding of the Parties hereto. Architect shall be entitled to no other benefits than those specified herein. No changes, amendments or alterations shall be effective unless in writing and signed by both Parties. Architect specifically acknowledges that in entering this Agreement, Architect relies solely upon the provisions contained in this Agreement and no others.

**Article 17. Non-Assignment Of Agreement**

In as much as this Agreement is intended to secure the specialized Services of the Architect, Architect may not assign, transfer, delegate or sublet any interest therein without the prior written consent of District and any such assignment, transfer, delegation or sublease without the District's prior written consent shall be considered null and void. Likewise, District may not assign, transfer, delegate or sublet any interest therein without the prior written consent of Architect and any such assignment, transfer, delegation or sublease without Architect's prior written consent shall be considered null and void.

**Article 18. Law, Venue**

- 18.1. This Agreement has been executed and delivered in the State of California and the validity, enforceability and interpretation of any of the clauses of this Agreement shall be determined and governed by the laws of the State of California.
- 18.2. To the fullest extent permitted by California law, the county in which the District administration office is located shall be the venue for any action or proceeding that may be brought or arise out of, in connection

with or by reason of this Agreement.

**Article 19. Alternative Dispute Resolution**

All claims, disputes or controversies arising out of, or in relation to the interpretation, application or enforcement of this Agreement may be decided through mediation as the first method of resolution. If this method proves unsuccessful, then all claims, disputes or controversies as stated above may be decided through arbitration, if agreed to by all Parties.

**Article 20. Severability**

If any term, covenant, condition or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remainder of the provisions hereof shall remain in full force and effect and shall in no way be affected, impaired or invalidated thereby.

**Article 21. Employment Status**

- 21.1. Architect shall, during the entire term of Agreement, be construed to be an independent contractor and nothing in this Agreement is intended nor shall be construed to create an employer-employee relationship, a joint venture relationship, or to allow District to exercise discretion or control over the professional manner in which the Architect performs the Services which are the subject matter of this Agreement; provided always, however, that the Services to be provided by Architect shall be provided in a manner consistent with all applicable standards and regulations governing such Services.
- 21.2. Architect understands and agrees that the Architect's personnel are not and will not be eligible for membership in or any benefits from any District group plan for hospital, surgical or medical insurance or for membership in any District retirement program or for paid vacation, paid sick leave or other leave, with or without pay or for other benefits which accrue to a District employee.
- 21.3. Should District, in its discretion, or a relevant taxing authority such as the Internal Revenue Service or the State Employment Development Department, or both, determine that Architect is an employee for purposes of collection of any employment taxes, the amounts payable under this Agreement shall be reduced by amounts equal to both the employee and employer portions of the tax due (and offsetting any credits for amounts already paid by Architect which can be applied against this liability). District shall then forward those amounts to the relevant taxing authority.
- 21.4. Should a relevant taxing authority determine a liability for past services performed by Architect for District, upon notification of such fact by District, Architect shall promptly remit such amount due or arrange with District to have the amount due withheld from future payments to Architect under this Agreement (again, offsetting any

amounts already paid by Architect which can be applied as a credit against such liability).

- 21.5. A determination of employment status pursuant to the preceding two paragraphs shall be solely for the purposes of the particular tax in question, and for all other purposes of this Agreement, Architect shall not be considered an employee of District. Notwithstanding the foregoing, should any court, arbitrator, or administrative authority determine that Architect is an employee for any other purpose, then Architect agrees to a reduction in District's liability resulting from this Agreement pursuant to principles similar to those stated in the foregoing paragraphs so that the total expenses of District under this Agreement shall not be greater than they would have been had the court, arbitrator, or administrative authority determined that Architect was not an employee.
- 21.6. Nothing in this Agreement shall operate to confer rights or benefits on persons or entities not a party to this Agreement.

#### **Article 22. Certificate Of Architect**

- 22.1. Architect certifies that the Architect is properly certified or licensed under the laws and regulations of the State of California to provide the professional Services that it has herein agreed to perform.
- 22.2. Architect certifies that it is aware of the provisions of the California Labor Code that 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 it certifies that it will comply with those provisions before commencing the performance of the Services of this Agreement.
- 22.3. Architect certifies that it is aware of the provisions of California Labor Code that require the payment of prevailing wage rates and the performance of other requirements on certain "public works" and "maintenance" projects ("Prevailing Wage Laws"). Since the Architect is performing Services as part of an applicable "public works" or "maintenance" project, and since the total compensation is \$1,000 or more, the Architect agrees to fully comply with and to require its consultant(s) to fully comply with all applicable prevailing wage requirements of the California Labor Code.

#### **Article 23. Cost Disclosure - Documents And Written Reports**

Architect shall be responsible for compliance with California Government Code section 7550, if the total cost of the Contract is over five thousand dollars (\$5,000).

#### **Article 24. Notice & Communications**

Notices and communications between the Parties to this Agreement may be

sent to the following addresses:

**District:**

Oakland Unified School District  
Facilities Department  
955 High Street  
Oakland, CA 94601  
ATTN: Tadashi Nakadegawa

**Architect:**

Dara A. Youngdale  
HKIT Architects  
538 Ninth Street, Suite 240  
Oakland, CA 94607  
ATTN: Dara A. Youngdale

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

**Article 25. Disabled Veteran Business Enterprise Participation**

Pursuant to section 17076.11 of the Education Code, the District has a participation goal for disabled veteran business enterprises (DVBES) of at least three (3) percent, per year, of funds expended each year by the District on projects that use funds allocated by the State Allocation Board pursuant to the Leroy F. Greene School Facilities Act (the Act). This Project may use funds allocated under the Act. Therefore, to the extent feasible and pertaining to future hirings, the Architect, before it executes the Agreement, shall provide to the District certification of compliance with the procedures for implementation of DVBE contracting goals, appropriate documentation identifying the amount(s) intended to be paid to DVBEs in conjunction with the contract, and documentation demonstrating the Architect's good faith efforts to meet these goals.

**Article 26. District's Right to Audit**

- 26.1. District retains the right to review and audit, and the reasonable right of access to Architect's and any sub-consultant's premises to review and audit the Architect's compliance with the provisions of this Agreement ("District's Right"). The District's Right includes the right to inspect, photocopy, and to retain copies, outside of the Architect's premises, of any and all Project-related records and other information with appropriate safeguards, if such retention is deemed necessary by the District in its sole discretion. The District shall keep this information confidential, as allowed by applicable law.
- 26.2. The District's Right includes the right to examine any and all books, records, documents and any other evidence of procedures and practices that the District determines are necessary to discover and verify that the Architect is in compliance with all requirements of this Agreement.
- 26.3. If there is a claim for additional compensation or for Extra Services, the District's Right includes the right to examine books, records,

documents, and any and all other evidence and accounting procedures and practices that the District determines are necessary to discover and verify all direct and indirect costs, of whatever nature, which are claimed to have been incurred, or anticipated to be incurred.

- 26.4. The Architect shall maintain complete and accurate records in accordance with generally accepted accounting practices in the industry. The Architect shall make available to the District for review and audit, all Project related accounting records and documents, and any other financial data. Upon District's request, the Architect shall submit exact duplicates of originals of all requested records to the District.
- 26.5. The Architect shall include audit provisions in any and all of its subcontracts, and shall ensure that these sections are binding upon all subconsultants.
- 26.6. Architect shall comply with these provisions within fifteen (15) days of the District's written request to review and audit any or all of Architect's Project-related records and information.

#### **Article 27. Other Provisions**

- 27.1. The Architect shall be responsible for the cost of construction change orders caused directly by the Architect's willful misconduct or negligent acts, errors or omissions. Without limiting Architect's liability for indirect cost impacts, the direct costs for which the Architect shall be liable shall equal the difference between the cost of the change order and the reasonable cost of the work had that work been a part of the originally prepared construction documents. These amounts shall be paid by Architect to District or the District may withhold those costs from amounts owing to Architect.
- 27.2. Neither the District's review, approval of, nor payment for, any of the Services required under this Agreement shall be construed to operate as a waiver of any rights under this Agreement, and Architect shall remain liable to the District in accordance with this Agreement for all damages to the District caused by Architect's failure to perform any of the Services furnished under this Agreement to the standard of care of the Architect for its Services, which shall be, at a minimum, the standard of care of architects performing similar work for California school districts in or around the same geographic area of the District.
- 27.3. Each party warrants that it has had the opportunity to consult counsel and understands the terms of this Agreement and the consequences of executing it. In addition, each party acknowledges that the drafting of this Agreement was the product of negotiation, that no party is the author of this Agreement, and that this Agreement shall not be construed against any party as the drafter of the Agreement.

**Article 28.** Exhibits A through E attached hereto are hereby incorporated by this reference and made a part of this Agreement.

**Article 29. Roofing Certification (If Applicable)**

Architect shall execute the Roofing Certification attached hereto as **Exhibit "F"** for Services containing a roof repair or replacement project. Architect shall submit the Roofing Certification to the District prior to the time Services are engaged.


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 9.8; and by signing this contract, certifies that this vendor does not appear on the Excluded Parties List. <https://www.sam.gov/portal/public/SAM>

*Muni Butler Kelly 2-7-2014*



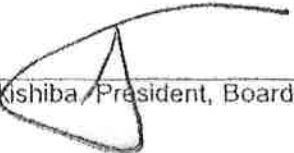
ACCEPTED AND AGREED on the date indicated below:

ARCHITECT


By:   
Its: President

1/30/14  
Date

OAKLAND UNIFIED SCHOOL DISTRICT

  
David Kakishiba, President, Board of Education

2/27/14  
Date

  
Dr. Gary Yee, Ed.D., Acting Superintendent  
and Secretary, Board of Education

2/27/14  
Date


\_\_\_\_\_  
Timothy E. White, Associate Superintendent, Facilities,  
Planning and Management

\_\_\_\_\_  
Date

APPROVED AS TO FORM:

  
Cate Boskoff, Facilities Legal Counsel

2/5/14  
Date

File ID Number: 14-0306  
Introduction Date: 2-26-14  
Enactment Number: 14-0334  
Enactment Date: 2-26-14  
By: 

AGREEMENT FOR ARCHITECTURAL SERVICES

OAKLAND UNIFIED SCHOOL DISTRICT

Exhibit A

## **EXHIBIT "A"**

### **RESPONSIBILITIES AND SERVICES OF ARCHITECT**

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

- **SCOPE OF PROJECT**

The scope of the project is to provide design services, structural engineering, mechanical/electrical/plumbing engineering, photovoltaic, civil engineering, landscape design, fire alarm / intrusion alarm design, food services and cost estimating services. Services also include program and conceptual design verification and refinement, full design development and documentation; the Division of State Architect approval process, construction administration and closeout services in addition to daylight modeling and energy use modeling.

- **BASIC SERVICES**

Architect agrees to provide the services described below:

1. Architect shall be responsible for the professional quality and technical accuracy of all studies, reports, projections, master plans, designs, drawings, specifications and other services, including Collaborative for High Performance Schools (CHPS) program registration and compliance per OUSD/CHPS guidelines, DSA/OPSC High Performance Incentive (HPI) Grant Program submission, if eligible, and PG&E's Savings By Design rebate incentive program, as applicable, furnished by Architect under the Agreement as well as coordination with all Master plans, studies, reports and other information provided by District. Architect shall, without additional compensation, correct or revise any errors or omissions in its studies, reports, projections, master plans, design, drawings, specifications and other services.
2. The District shall provide all information available to it to the extent the information relates to Architect's scope of work. This information shall include, if available,
  - a. Physical characteristics,
  - b. Legal limitations and utility locations for the Project site(s),
  - c. Written legal description(s) of the Project site(s),
  - d. Grades and lines of streets, alleys, pavements, and adjoining property and structures;
  - e. Adjacent drainage;
  - f. Rights-of-way, restrictions, easements, encroachments, zoning, deed restrictions, and boundaries and contours of the Project site(s);
  - g. Locations, dimensions and necessary data with respect to existing buildings, other improvements and trees;
  - h. Information concerning available utility services and lines, mechanical and other services, both public and private, above and below grade, including inverts and

depths;

- i. Surveys, reports, as-built drawings, record drawings; and
- j. Subsoil data, chemical data, and other data logs of borings.

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

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

- a. In the event that the Architect provides site information and documentation as an Additional Service to the contract, then Architect shall be fully responsible for the accuracy and quality of site documentation including site survey data, utility information, and all aspects site conditions as confirmed by the Architect.

3. **Technology Backbone.** Architect shall be responsible for the coordination of the design and the layout of the technology backbone system with the District's technology department, and lay out any included technology backbone system. Architect shall coordinate the design and layout of the Project improvements to include the integration of the District's Wide Area Network ("WAN"), also known as the Gigaman network. The coordination effort shall include location and routing of raceways, conduits and outlets and the required spaces to accommodate electrical, data and communication wiring, from the utility provider network to the school, and the entire Local Area Network within the school. Architect and consultant(s) shall prepare and be responsible for documents prepared by the Architect based on the information provided by the District's technology consultant as appropriate to the level of design completion.
4. **Interior Design.** Provide interior design and other similar services required for or in connection with selection and color coordination of materials. Architect is required to coordinate the placement of furniture, equipment layout, or schematic space allocation. The District shall procure furnishings and moveable equipment. Advise the District on lead times and availability of all specified Project equipment, materials, supplies, and furnishings to verify that all of these will be available to the District in a timely fashion so as to not delay the Project and/or delay the District's beneficial occupancy of the Project.
5. **District Standards.** District Standards. Architect shall incorporate in to its work and the work of all consultants the adopted District Standards for facilities and

construction including, but not limited to, OUSD/CHPS Guidelines, including Owner's Project Requirements and District Standards as Adopted by the Board of Education in Resolution 0607-0158. **Failure by Architect to incorporate Oakland Unified School District Standards as updated to latest OUSD CHPS Guidelines into its work and the work of all Architect sub consultants is deemed to be a material breach of this Agreement.**

**6. Mandatory Assistance**

If a third party dispute or litigation, or both, arises out of, or relates in any way to the Services provided under this Agreement, upon the District's request, and excepting any conflicts at interest, the Architect, its agents, officers, and employees agree to assist in resolving the dispute or litigation. The Architect's assistance includes, but is not limited to, providing professional consultations, attending mediations, arbitrations, depositions, trials or any event related to the dispute resolution and/or litigation ("Mandatory Assistance")

☐ **CHPS VERIFIED PLUS HPI INCENTIVE WITH OPSC ELIGIBILITY TRACK**

**7. Collaborative for High Performance Schools ("CHPS") Criteria, CHPS Verified Program and State of California High Performance Schools Incentive (HPI) Grant Program.** As part of Basic Services, the Architect shall adhere to the District's OUSD CHPS Guidelines, and Owner's Project Requirements (OPR) based on incorporating required and voluntary design Criteria of the Collaborative for High Performance Schools ("CHPS")—2009 Criteria (or latest version per OUSD CHPS Guidelines,), into the project. As a part of Basic Services the Architect shall complete all documentation and submission requirements necessary for the State of California High Performance Schools Incentive (HPI) Grant Program as eligible as well as the CHPS Verified Program. The Architect shall work with the District and its CHPS Program Manager to confirm CHPS and DSA/OPSC HPI review path with OUSD as CHPS and HPI Programs develops, and verify that the District's project meets the highest possible point score under CHPS Criteria and to maximize HPI grant funding, consistent with the District's budget.

a. The Architect and Subconsultants shall participate early on in two CHPS Integrated design workshops, led by the District's CHPS Program Manager to establish OUSD CHPS Guideline goals and identify target credits. The Architect shall be responsible for Registering the project on-line with the CHPS Verified Program, and submitting for design and construction verification according to CHPS Verified Program Guidelines. The Architect shall update the CHPS "Scorecard" and the DSA HPI Scorecard, OR the "Joint CHPS Verified/HPI scorecard," as available, with credit documentation, concurrent with each design phase submittal. The status of project compliance and documentation submitted in relation to CHPS Verified and HPI credits shall be assessed with the District at the end of each phase of the work.

b. Whole building energy performance analysis with goal of 30% < CA Title 24 minimum energy performance standard shall be performed at least once during each the following phases: Schematic Design, Design Development, and Construction Documentation. Energy Conservation Measures (ECMs) shall be proposed with Schematic and Design Development energy analysis runs to improve performance to meet or exceed goal. Daylighting analysis to identify strategies to improve daylighting to maximize goals of CHPS Credit EQ 1.1 'Daylighting,' shall also be performed at Schematic, and Design Development Phases prior to final Construction Documentation phase analysis reflecting final design incorporating daylighting

Improvements identified in earlier phases.

c. The Architect shall assist the District in a timely manner, in preparing applications to the Division of State Architect and Office of Public School Construction which shall meet DSA/HPI submission requirements, including calculations demonstrating Acoustic Performance standards per OUSD/CHPS guidelines are met, and all required documentation required to meet CHPS Verified rating and receive funding under the DSA/OPSC High Performance Schools Incentive Grant Program. Final approved HPI, or Joint CHPS Verified/HPI, scorecard indicating points verified, and DSA HPI-1 forms shall be forwarded by the Architect upon receipt to the District's Project Manager and OUSD CHPS Program Manager.

☒ **CHPS VERIFIED ONLY/ NO OPSC HPI ELIGIBILITY TRACK**

**7. Collaborative for High Performance Schools ("CHPS") Criteria, CHPS Verified Program** As part of Basic Services, the Architect shall adhere to the District's OUSD CHPS Guidelines, and Owner's Project Requirements (OPR) based on Incorporating required and voluntary design Criteria of the Collaborative for High Performance Schools ("CHPS")—2009 Criteria (or latest version per OUSD CHPS Guidelines,), into the project. As a part of Basic Services the Architect shall complete all documentation and submission requirements necessary for Registration and Design and Construction Submissions of the CHPS Verified Program. The Architect shall work with the District and OUSD CHPS Program Manager to confirm CHPS Verified review path and verify that the District's project meets the Owner's Project Requirements and OUSD CHPS Guideline goals for a CHPS Verified school project consistent with the District's budget.

a. The Architect and Subconsultants shall participate early on in two CHPS Integrated design workshops, led by the District's CHPS Program Manager to establish OUSD CHPS Guideline goals and identify target credits. The Architect shall be responsible for Registering the project on-line with the CHPS Verified Program, and submitting for Design and Construction verification according to CHPS Verified Program Guidelines. The Architect shall update the CHPS "Scorecard" with credit documentation, concurrent with each design phase submittal. The status of project compliance and documentation submitted in relation to CHPS Verified credits shall be assessed with the District at the end of each phase of the work.

b. Whole building energy performance analysis with goal of 30% < CA Title 24 minimum energy performance standard shall be performed at least once during the following phases: Schematic Design, Design Development, and Construction Documentation. Energy Conservation Measures (ECMs) shall be proposed with Schematic and Design Development energy analysis runs to improve performance to meet or exceed goal. Daylighting analysis to identify strategies to improve daylighting to maximize goals of CHPS Credit EQ 1.1 'Daylighting,' shall also be performed at Schematic, and Design Development Phases prior to final Construction Documentation phase analysis reflecting final design incorporating daylighting improvements identified in earlier phases.

c. The Architect shall complete steps as required by the CHPS Verified Program to achieve a CHPS Verified school project, including calculations demonstrating Acoustic Performance standards per OUSD/CHPS guidelines are met, and forward electronic pdf copies of all submissions and communications with CHPS, concurrently, to the District's Project Manager and OUSD CHPS Program Manager.

**CHPS DESIGNED ONLY/ OUSD CHPS GUIDELINES / MINOR MODERNIZATION  
SCOPE ONLY/ NO OPSC HPI ELIGIBILITY TRACK**



**7. Collaborative for High Performance Schools ("CHPS") Criteria, and OUSD CHPS Guidelines** As part of Basic Services, the Architect shall adhere to the District's OUSD CHPS Guidelines, and Owner's Project Requirements (OPR, based on incorporating required and voluntary design Criteria of the Collaborative for High Performance Schools ("CHPS")—2009 Criteria (or latest version per OUSD CHPS Guidelines,)), into the project. As a part of Basic Services the Architect shall complete all documentation and submission requirements necessary to self-certify the school project as 'CHPS Designed' according to the CHPS Designed Program and transmit the documentation to the District for its potential future submission to the CHPS Verified Program. The Architect shall work with the District and OUSD CHPS Program Manager to verify that the District's project meets the Owner's Project Requirements and OUSD CHPS Guideline goals for a CHPS Verified school project consistent with the District's budget.

a. The Architect and Subconsultants shall participate early on in two CHPS Integrated design workshops, led by the District's CHPS Program Manager to establish OUSD CHPS Guideline goals and identify target credits. The Architect shall update the CHPS "Scorecard" with credit documentation to the extent applicable to scope, concurrent with each design phase submittal. The status of project compliance and any documentation submitted in relation to CHPS Designed credits shall be assessed with the District at the end of each phase of the work.

b. Whole building energy performance analysis with goal of 30% < CA Title 24 minimum energy performance standard shall be performed at least once during the following phases: Schematic Design, Design Development, and Construction Documentation. Energy Conservation Measures (ECMs) shall be proposed with Schematic and Design Development energy analysis runs to improve performance to meet or exceed goal. Daylighting analysis, as applicable to scope of work, to identify strategies to improve daylighting to maximize goals of CHPS Credit EQ 1.1 'Daylighting,' shall also be performed at Schematic, Design Development, and Construction Documentation phases.

c. The Architect shall complete and transmit the CHPS Designed Scorecard, including calculations demonstrating Acoustic Performance standards per OUSD/CHPS guidelines are met, and any documentation to the District in electronic format suitable for combination with a subsequent project(s) for potential future submission to the CHPS Verified Program to the District's Project Manager and OUSD CHPS Program Manager.

8. **Alternates.** As part of Basic Services, Architect shall design the Project to include alternates, either deductive or additive, in an amount equal to 10% of the budget for the Project. These alternates shall be identified in the Design Development Phase.

9. **Coordination with Local, State, Federal Agencies.** The Architect shall coordinate and assist in the preparation of all necessary documents and studies as required by the State Allocation Board ("SAB"), Office of Public School Construction ("OPSC"), Division of State Architect (DSA), California Department of Education ("CDE") and other local, state and federal agencies. The Architect shall also coordinate and assist the District in qualifying for utility rebates and funding including, but not limited to, energy rebates and applications to PG&E's Savings By

Design program for all new buildings. The District shall be copied on all such documentation, correspondence and communications with utilities, local, state and federal agencies. The Architect shall also coordinate and assist the District in obtaining required approvals from various public agencies and utility companies including, but not limited to, Department of Public Health, services from electric, gas, water, stormwater control or sanitary sewer, and telephone and cable TV public utilities. The Architect shall coordinate all local, state and federal agency requirements specific to the Project.

10. **Utility Services Verification.** The Architect shall prepare the documentation required to make points of connection to existing utility services provided by the public utilities. The Architect shall verify the capacity of existing utilities, or for any design or documentation required to make points of connection to existing utility services required for the Project, as well as verify all existing electric, gas, and water meter numbers and locations on site for coordination with the District's Portfolio Manager benchmarking efforts. Location and actual meter number(s) of any new meters installed with this scope of work shall be recorded on an 8 1/2 "x 11" site plan of the project site and submitted to the District upon completion of meter installations.

• **PRE-DESIGN AND START-UP SERVICES**

1. **Project Initiation**

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

- a. Within the first week following execution of the Agreement, review the proposed Schedule of Work set forth in Exhibit "C" to the Agreement and prepare a detailed scope of work list and work plan for documentation in a computer-generated Project schedule to the District's satisfaction. This scope of work list and work plan will identify specific tasks including, but not limited to: Interviews, data collection, analysis, report preparation, planning, architectural programming, concepts, CHPS workshops with CHPS, and DSA/OPSC HPI, OR "Joint CHPS/HPI" (as applicable) Scorecards and credit documentation, and schematic design preparation and estimating that are part of the work of the Project. Architect shall also identify milestone activities or dates, specific task responsibilities, required completion times necessary for the review and approval by the District and by all reviewing or regulatory agencies and additional definition of deliverables.
- b. Review the developed work plan with the District and its representatives to familiarize them with the proposed tasks and schedule and develop necessary modifications.
- c. Perform pre-design investigations to establish appropriate guidelines around which and within which the Project is to be designed. Identify design issues relating to functional needs, directives and constraints imposed by regulatory codes. Review all data pertinent to the Project including survey, site maps, geotechnical reports and recommendations, soil testing results reports, and pertinent historical data, and other relevant information provided by District.



- d. Review applicable codes, building standards and Owner's Project Requirements (OPR) pertaining to the proposed Project design.
- e. Identify design issues relating to functional needs, directives, and OPR that may be affected by constraints imposed by applicable regulatory codes, or standards, and communicate any issues in writing.
- f. Based on survey and topography data provided by the District, develop existing conditions base and a site analysis plan for the Schematic Design Phase.
- g. Administer Project as required to coordinate work with the District and between subconsultants. Submit a Basis of Design, with primary input from MEP subconsultants in response to Owner's Project Requirements provided by the District.

## 2. Meetings

During this Phase, Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops to develop the Architectural Program with construction Cost Budget, and as indicated below.

- a. Participate in initial CHPS workshop facilitated by District CHPS Program Manager to develop preliminary CHPS/HPI scorecard(s) and review Owner's Project Requirements.
- b. Conduct meeting with OUSD Buildings and Ground and Custodial/Maintenance staff as well as District Facilities Project Manager and Site Principal to review Basis of Design and approach to building systems, and operations.

## 3. Construction Cost Budget

- (i) Architect shall have responsibility to further review the Construction Cost Budget within the parameters of the Construction Budget established in the District's Implementation plan. The estimates forming the basis of the Construction Cost Budget are to be prepared by the Program Manager and the Design Phase Manager and are to be based on the developed functional architectural programs as approved by the District. The Architect shall be responsible to review and advise on all elements of the Cost Estimates prepared by the District's management team. The following conditions apply to the Construction Cost Budget reviewed by the Architect:
  - (A) All costs are to be based on current bid prices, with escalation rate and duration clearly identified as a separate line item; rate of cost escalation and projected bid and construction dates are to be as approved by the District and its representatives.
  - (B) Format shall be in a building systems format (e.g., foundations, substructure, structural system, exterior wall enclosure, window systems, etc.) for new buildings,

and summarized by the Construction Specification Institute (CSI) category for buildings being modernized.

- (C) Contingencies for design, bidding, and construction are to be included as individual line items, with the percentage and base of calculation clearly identified.
- (D) The Architect shall review all information and estimates from the District and/or the Construction Manager that are intended to be part of the Construction Cost Budget.

Prior to beginning each subsequent phase of the work the Architect shall verify in writing that they have reviewed Construction Cost Budget.

- (E) Mechanical, electrical, civil and landscape consultant(s) shall participate in the progress meeting as appropriate and shall provide input and feedback into the development of the Construction Cost Budget.

- (i) The Construction Cost Budget for the Project must at no point exceed the District's Construction Budget for the Project. The accuracy of the Construction Cost Budget shall be the responsibility of the Program Manager and the Design Phase Manager. However, the Architect shall be responsible to provide review, and final acceptance of the Construction Cost Budget as the basis for continuing the proposed project design.

#### **4. Presentation**

Architect along with any involved consultant(s) shall present and review with the District and, if directed, with it's the District's governing board, the summary and detail of work involved in this Phase, including two dimensional renderings of any proposed facility suitable for public presentation with preliminary CHPS Scorecard.

#### **5. Deliverables and Numbers of Copies**

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

- a. Two copies of Architectural Program (Include comparison between developed program and "model" program, include narrative explaining any substantial deviations);
- b. Two copies of Site Analysis Plan with Two copies of Conceptual Site Plan;
- c. Two copies of Architect's concurrence with the revised Construction Cost Budget;
- d. Two copies of final Schedule of Work;

- e. Two copies of meeting Reports/Minutes from Kick-off and other meetings/workshops;
- f. Two copies of Basis of Design
- g. Two copies of preliminary CHPS/HPI scorecard(s).

## • SCHEMATIC DESIGN PHASE

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

1. Prepare and review with District staff a scope of work list and work plan identifying specific tasks including, but not limited to: interviews, data collection, analysis, report preparation, planning, architectural programming, concepts CHPS/HPI scorecard with design credit documentation updates and schematic design preparation and estimating that are part of the work of the Project. Also identified will be milestone activities or dates, specific task responsibilities of the Architect, required completion times necessary for the review and approval by the District and by pertinent regulatory agencies and additional definition of deliverables.
2. Review the developed work plan with the District and its representatives to familiarize them with the proposed tasks and schedule and develop necessary modifications.
3. Confirm with the District and with approving agencies, including DSA, the overall packaging of the Project into increments or phases which will provide a complete project, including definition of HPI Incentive grant eligible portion(s), as applicable.
  - a. Identify each of the Project increments and prepare a package of documents which is complete and coordinated with the overall project and all increments of the work which make up the complete project.
  - b. For each increment of the work the following requirements shall apply, similarly at each subsequent phase of the Architect's service.
4. **Architectural**
  - a. Scaled floor plans showing overall dimensions, identifying the various major areas and their relationship. Include circulation and room-by-room tabulation of all net usable floor areas and a summary of gross floor area. Also, provide typical layouts of major equipment or operational layout.
  - b. Preliminary building exterior elevations and sections in sufficient detail to demonstrate design concept indicating location orientation, type, and size of fenestration.
  - c. As applicable, identify proposed roof system, deck, building envelope insulation system with R-values and drainage technique.
  - d. Identify minimum finish requirements, including ceiling, floors, walls, doors, windows, and types of hardware.
  - e. Identify code requirements, including identification of CALgreen mandatory and voluntary compliance, with occupancy classification(s) and type of construction.

- f. Update CHPS/HPI scorecard and credit documentation to reflect Schematic Design

**5. Structural**

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

**6. Mechanical/Plumbing**

- a. Calculate block heating, ventilation, and cooling loads including skin versus internal loading.
- b. Select a minimum of two (2) low energy design approaches to HVAC systems that appear compatible with loading conditions and that meet the OPR for subsequent life cycle costing.
- c. Show selected system on drawings as follows:
  - (i) Single line drawing(s) of all mechanical equipment spaces, ductwork and pipe chases.
  - (ii) Location and preliminary sizing and efficiency of all major equipment and any duct work in allocated spaces.
  - (iii) Schematic piping.
  - (iv) Temperature control zoning and ventilation controls
- d. Provide systems design narratives outlining specific criteria or approach to meet Basis of Design for the projects.

**7. Food Service.**

- a. Provide as a part of Basic Services, preliminary designs for any Cafeteria and Food Service Kitchens, Warming Kitchens, service areas, and student/faculty serving lines.
  - (i) Coordinate work with the District's Food Services standards, identify Energy Star rated appliances/equipment, and meet with District staff to review preliminary designs and equipment.
  - (ii) Coordinate Food Services systems with Mechanical, Plumbing, and Electrical divisions.

**8. Electrical**

- a. Calculate overall approximate electrical loads.

- b. Identify proposed electrical system for service, power, lighting, low voltage and communication loads, including proposed or planned additional buildings or other facilities on the Project site.
  - (i) WAN and LAN preliminary design to indicate coordination with network utility, site routing, sizes and locations of MDF space and individual building or floor IDF locations, proposed in-building routing approaches, preliminary room LAN components, including computer locations, presentation technology elements, Centralized Voice System components.
- c. Show system(s) selected on drawings as follows:
  - (i) Single line drawing(s) showing major distribution system.
  - (ii) Location and preliminary sizing of all major electrical systems and components including:
    - (A) Load centers.
    - (B) Main panels.
    - (C) Switch gear.
- d. Provide any systems design narratives updates outlining specific criteria or approach to meet Basis of Design for the projects.

9. **Civil**

- a. Develop on and off Site utility systems such as sewer, domestic water system, stormwater management, storm drain, fire water lines and fire hydrants. Layout all proposed systems indicating all electric, gas, and water meters, tie-ins with existing on and off-site utilities. Provide the District with options for routing major utility systems, present options with anticipated costs and benefits to each of the proposed routes and system types.
  - (i) Meet with local Fire officials in the development of a preliminary Fire Access route on the site of the project and in the development of approved locations for on-site fire hydrants, Fire Dept connections, and fire water service routing and components.
- b. Coordinate the Schematic Civil work of the project with each of the major Utility service providers. Schedule and attend a preliminary design meeting with each provider, which shall include but not be limited to:
  - (i) PG&E
  - (ii) EBMUD
  - (iii) SBC
  - (iv) Comcast
  - (v) Local Sanitary District
  - (vi) Municipal Utility Systems.

- c. Identify surface improvements including roadways, walkways, bike lanes, parking (with assumed wheel weights), preliminary finish grades and drainage.
  - (i) Coordinate the work of the site development plans for the project with the District's Traffic Engineering Consultant.
- d. Coordinate finish floor elevations with architectural site plan.
- e. Develop and coordinate Stormwater Management Plan to meet compliance with local/county Water Resources Control Board and OUSD CHPS Guidelines.

**10. Landscape**

Develop and coordinate landscape design concepts, and entailing analysis of existing conditions, proposed components and how the occupants will use the facility. Include location and description of planting, ground improvements, stormwater management features, permeable and non-permeable paving, shade trees, and visual barriers.

**11. Specifications**

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

**12. Construction Cost Budget**

In coordination with the Program Manager and the Design Phase Manager update the Construction Cost Budget for the Project. Along with the conditions identified in the preceding Phase, the following conditions apply to the revised Construction Cost Budget:

- a. Schematic Estimates: This estimate consists of unit cost applied to the major items and quantities of work. The unit cost shall reflect the complete direct current cost of work. Complete cost includes labor, material, waste allowance, sales tax and subcontractor's mark-up.
  - (i) General conditions shall be applied separately. This estimate shall be prepared by specification section and summarized by the CSI categories.
- b. The estimate shall separate the Project's building cost from site and utilities cost.

- c. Escalation: all estimates shall be priced out at current market conditions. The estimates shall incorporate all adjustments as appropriate, relating to mid-point construction, contingency, and cost index (i.e. Lee Saylor Index).
- d. The Construction Cost Budget for the Project must at no point exceed the District's Construction Budget for the Project. The accuracy of the Construction Cost Budget shall be the responsibility of the Program Manager and the Design Phase Manager. The Architect shall participate in Estimate review and shall accept the Construction Cost Budget as reflected in the Cost Estimate updates at this and each phase.
- e. The Architect shall coordinate with the District's Program Manager and Design Phase Manager to further develop, review, and reconcile the Construction Cost Budget.
- f. At the end of this Phase, the Construction Cost Budget may include design contingencies of no more than ten percent (10%) in the cost estimates.

**13. Meetings**

During this Phase, Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as required to complete the work of this phase of the project, and specifically as indicated below.

- a. Community or Neighborhood review meeting conducted by the District with a complete presentation of the project.
- b. CHPS integrated design workshop
- c. Board of Education public meeting presentation.
- d. City Council or other local agency presentation.

**14. Deliverables and Numbers of Copies**

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

- (2) Confirmation of Construction Cost Budget as prepared for this Phase;
- (2) Meeting Reports/Minutes;
- (2) Schematic Design Package with alternatives as may be required to consider all appropriate project options.
- (2) A statement indicating changes made to the Architectural Program and Schedule.



- (3) CHPS/HPI scorecard with documentation for Design Credits, including preliminary Daylighting analysis documentation for CHPS credit EQ 1.1 updated to reflect Schematic Design
- (4) Preliminary T24 whole building energy analysis reflecting Schematic Design plus list of Energy Conservation Measures (ECMs) with initial cost and projected cost savings and payback period.

DSA file, including all correspondence and meeting notes to date, or notification in writing that Architect has not met or corresponded with DSA.

- (1) Complete Schematic Design Color Presentation Package including PowerPoint presentation and mounted glossy boards with Site Plan, Floor Plans, Elevations, and any other drawings to fully indicate the project schematic design, indicating high performance school design features.

#### 15. **Presentation**

- a. Architect shall present and review with the District the detailed Schematic Design and CHPS documentation.
- b. The Schematic Design shall be revised within the accepted program parameters until a final concept within the accepted Construction Cost Budget has been accepted and approved by the District at no additional cost to the District.
- c. The Architect shall meet with the Principal and the Site Committee of the school and shall attain the Principal's signature of approval of the design on one set of drawings including CHPS/HPI scorecard prepared by Architect.
- d. Prior to approval of the project Schematic Design, the Architect shall meet with the District and make presentations to the District's Superintendent and Board of Education of the project schematic design with intended CHPS targets..
  - (i) Where the Superintendent or the Board request reasonable changes to the project the Architect shall incorporate such changes as a part of Basic Services and prior to advancing to the next phase of work.

• **DESIGN DEVELOPMENT PHASE**

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

2. **Architectural**

- a. Demolition Plans. Where the project includes renovation of existing buildings Demolition Plans shall have a preliminary level of definition including general descriptions of areas of the buildings to be demolished, salvaged, and/or recycled for re-use as a part of the work.
- b. Scaled, dimensioned floor plans with final room locations including all openings.
- c. 1/8" scale building sections showing dimensional relationships, materials and component relationships.
- d. Exterior Elevations of all proposed new buildings, existing buildings to be renovated and all architectural elements of the project.
- e. Identification of all fixed equipment, cabinets, shelves, casework to be installed in contract.
- f. Interior Finishes Identified and located within the rooms of all buildings.
- g. Site plan completely drawn with beginning notes and dimensions including grading and paving.
- h. Preliminary development of details and large scale blow-ups.
- i. Legend showing all symbols used on drawings.
- j. Floor plans identifying all fixed and major movable equipment and furniture.
- k. Further refinement of Specifications for architectural, structural, mechanical, electrical, civil and landscape manuals, systems and equipment.
- l. Typical reflected ceiling development including ceiling grid and heights for each ceiling to be used, showing:
  - (i) Light fixtures.
  - (ii) Ceiling registers or diffusers.

(iii) Access Panels.

- m. Update CHPS/HPI scorecard and credit documentation to reflect Design Development
- n. Response to Commissioning Agent comments on current Design

**3. Structural:**

- a. Developed structural drawings with all foundation elements, and structural major members and elements defined, located and sized.
- b. Establish final building and floor elevations.
- c. Preliminary specifications.
- d. Preliminary calculations for the structural systems including lateral force resistive systems, foundations, and all structural system components.
- e. Identify foundation requirement (including fill requirement, piles) with associated soil pressure, water table and seismic design criteria.

**4. Mechanical**

- a. Heating and cooling load calculations as required and major duct or pipe runs sized to interface with structural.
- b. Major mechanical equipment should be scheduled indicating size and capacity.
- c. Ductwork and piping should be substantially located and sized.
- d. Plumbing Plans for project shall indicate numbers and locations of fixtures and be in conformance with the code-mandated fixture count requirements of the project.
- e. Devices in ceiling should be located.
- f. Legend showing all symbols used on drawings.
- g. More developed Outline Specifications Indicating quality level and manufacture.
- h. Control Systems to be identified and laid out with requirements for wiring, devices, and system components included in the documents.

**5. Food Service.**

Update and develop preliminary designs for Cafeteria and Food Service Kitchens, Warming Kitchens, service areas, and student/faculty serving lines. Prepare equipment and fixture schedules, indicating Energy Star Appliances. Prepare

developed designs for special systems, finishes, materials, or details required to complete a full package of Food Services work in the project.

- (i) Coordinate work with the District's Food Services standards and meet with District staff to review updated designs and equipment.
- (ii) Coordinate Food Services systems with Mechanical, Plumbing, and Electrical divisions.

## 6. Electrical

All lighting fixtures should be located and scheduled showing all types and quantities of fixtures to be used, including proposed lighting levels with photometrics, and clear lighting controls for CHPS/HPS credit EQ 1.3 Electric Lighting documentation meeting OUSD CHPS Guidelines

- a. for each usable space.
- b. All major electrical equipment should be scheduled indicating size and capacity.
- c. Complete electrical distribution including a one line diagram indicating final location of switchboards, communications, controls (high and low voltage), motor control centers, panels, transformers and emergency generators, if required.
- d. Low voltage system designs fully developed including fire alarm system, security system, clock and public address system, voice data system, and telecom/technology system.
- e. WAN and LAN systems developed to indicate network utility connections, sizes and locations of pull/pull boxes, site routing for all underground system components, sizes and locations, and layouts of MDF spaces and individual building or floor IDF locations, proposed in-building routing approaches, confirmed room LAN components, including computer locations, presentation technology elements, Centralized Voice System components. Preliminary material and product specifications completed.
- f. Legend showing all symbols used on drawings.
- g. More developed and detailed Specifications indicating quality level and manufacture for all elements of the Electrical system.

## 7. Civil

- a. Further refinement of Schematic Design Phase development of on and off site utility systems for sewer, electrical, water, stormwater management, storm drain and fire water. Includes, without limitation, pipe sizes, materials, invert elevation location and installation details.

- b. Further refinement of Utility systems designs for on and off-site utility services to the project.
- c. Further refinement of Schematic Design Phase roadways, walkways, bike lanes, parking and storm drainage improvements. Includes details and large scale drawings of curb and gutter, manhole, thrust blocks, paved parking and roadway sections.
  - (l) Incorporate final comments and design proposals of the District's Traffic Engineering Consultant Into the project documents.

**8. Landscape**

Further refinement of Schematic Design concepts. Includes coordination of hardscape, landscape planting, ground cover stormwater management features, and irrigation main distribution lines. Selection of site furnishings in accordance with District standards.

**9. Architect Review**

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

**10. Construction Cost Budget**

- a. Working with the Design Phase Manager and the Program Manager, who shall have primary responsibility to prepare Cost Estimates for the Project, review the Construction Cost Budget for the Project. Along with the conditions identified in the Agreement and the preceding Phases, the following conditions apply to the revised Construction Cost Budget for the Design Development Phase:
- b. Design Development Estimate: This further revised estimate shall be prepared by specification section, summarized by CSI category and divided by trade and work item. The estimate shall include individual item unit costs of materials, labor and equipment. Sales tax, contractor's mark-ups, and general conditions shall be listed separately.
- c. The Construction Cost Budget for the Project must at no point exceed the District's Construction Budget for the Project. The accuracy of the Construction Cost Budget shall be the primary responsibility of the Design Phase Manager and the Program Manager. The Architect shall participate in Estimate review and shall accept the Construction Cost Budget as reflected in the Cost Estimate updates at this and each phase. However, if Architect believes that the Design Phase Manager estimates are inaccurate, Architect shall inform the District of such belief. If the Cost Estimate exceeds the District's Construction Budget, Architect shall recommend revisions to bring the design within budget, and/or provide Life Cycle Cost Analysis to demonstrate long-term cost savings for evaluation with District.

- d. At this stage of the design, the Construction Cost Budget may include design contingencies of no more than ten percent (10%) in the cost estimates.

**11. Deliverables and Numbers of Copies**

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

- (2) Design Development drawing set from all professional disciplines necessary to deliver the Project.
- (2) Specifications.
- (2) Updated CHPS/HPI scorecard with documentation for Design Credits, including preliminary Daylighting analysis documentation for CHPS credit EQ 1.1 updated to reflect Design Development.
- (2) Updated T24 whole building energy analysis reflecting Design Development plus list of Energy Conservation Measures (ECMs) incorporated.
- (2) Response to Commissioning agent's comments on current Design
- (2) Architect's agreement with reconciled and revised Construction Cost Budget.
- (2) DSA file, including all correspondence and meeting notes to date, or notification in writing that Architect has not met or corresponded with DSA.

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

**12. Meetings**

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

The Architect shall also meet with the Principal and the Site Committee of the school and shall attain the Principal's signature of approval of the developed design on one set of drawings prepared by Architect.

## • CONSTRUCTION DOCUMENTS PHASE

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

Construction Documents ("CD") 100% CD's, DSA Submittal Package: Architect shall verify that all of the work of the project as indicated on the construction documents is complete, fully coordinated among the disciplines and meets the requirements of the Division of the State Architect for final submission and plan review of the project.

No separate 50% CD package shall be required for this project. The Architect shall initiate and coordinate an in-house 50% CD review with the District, and Design Phase Managers, including OUSD CHPS Program Manager and Commissioning Agent. This review shall include mandatory attendance by all of the Architect's sub-consultants and each shall present work-in-progress drawings, specifications, tables, calculations, sketches, CHPS and/or HPS Scorecard with all credit documentation, or other material clearly indicating that the work has progressed to the 50% CD phase.

### 2. Architectural

- a. Completed site plan. Site plan developed to show all building and improvement locations, all topographical elements and existing/proposed contour lines.
  - (i) Architectural site plans indicating the project phasing, locations of temporary housing if any, and coordinated fully with Landscape Plans, and Civil Plans.
  - (ii) Demolition Plans. Where the project includes renovation of existing buildings the Construction Documents Demolition Plans shall be fully developed and coordinated among all disciplines of the project to clearly define all areas of demolition, identify any deconstruction and quantify salvaged materials for re-use on or off-site, on the Demolition Plans.
    - (A) Demolition Plans for full buildings, whether a part of the full package or a separate package for Construction shall be complete and fully coordinated indicating:
      - (1) All buildings and site elements to be demolished, deconstructed, salvaged or recycled on -site, and/or recycled or removed;
      - (2) All underground utilities, piping, footings, and other structural or non-structural elements which will impact the work;
    - (B) Demolition Plans. Coordination with District's Hazardous Materials removal plans shall be complete at the end of this phase. Architect shall have reviewed with the District's Consultant all Hazardous Materials surveys and reports and clearly indicated to the Consultant any impacts due to the

demolition of existing building elements required by the project. Architects plans shall reference Hazardous Materials abatement plans and specifications to be incorporated into the Construction Document set.

- (iii) Completed floor plans, elevations, and sections. Elevations (exterior and interior) developed to clearly indicate all work and reference all details, materials, schedules, and special conditions which form the basis of the work, sections and floor plans corrected to reflect design development review comments.
  - (A) Floor plans, elevations and sections coordinated referencing all relevant details of the work.
  - (B) Floor plans, elevations, and sections developed to incorporate plan review comments by the District, cost estimators, and Constructability Reviewers.
- (iv) Architectural details and enlarged plans and details fully completed to indicate the detailed relationships of the elements of the work, materials, construction sequences, structural requirements, finish elements, and fully coordinated among all of the disciplines.
- (v) Finish, door, window, and hardware schedules completed, including all details, system types, special conditions and District requirements or standards referenced and coordinated among all the disciplines of the project.
- (vi) Site utility plans completed.
- (vii) Fixed equipment, cabinets and casework details and identification completed. Schedule complete with proper references to details, sizes, configurations and standards.
- (viii) Reflected ceiling plans completed and coordinated with floor plans, electrical lighting plans, schedules, details, and mechanical and electrical systems and controls.

Incorporate all information and site designs related to temporary housing, where applicable.

#### **Structural**

- (ix) Structural floor plans and sections with detailing completed. Complete wall sections for each structural system location.
- (x) Structural calculations completed.
- (xi) Structural footing and foundation plans, floor and roof framing plans with detailing completed.



- (xii) Special structural systems designed and detailed including all required bracing for shelving, special systems, brackets, and incidental elements of the design.
- (xiii) Lateral force resisting system calculations completed with system design fully developed and detailing completed and fully coordinated with architectural and other disciplines of the project.
- (xiv) Structural designs, members and systems fully coordinated by Structural Engineer with other disciplines of the project.
- (xv) Completed cover sheet with general notes, symbols and legends.

**b. Mechanical**

- (i) Mechanical calculations completed with all piping and ductwork sized.
- (ii) Large scale mechanical details completed, clearly referenced on plans and schedules, and coordinated with architectural disciplines, electrical, and structural engineering for the project.
- (iii) Mechanical schedule for equipment fully completed, with District reviews and approvals for all specified systems completed.
- (iv) All Mechanical systems fully coordinated with requirements for Electrical and Low Voltage service including Mechanical Controls, Fire safety systems.
- (v) Complete energy conservation calculations and report meeting, or exceeding, the requirements of California State Title 24. Coordinate work of this portion of the project with the District's Energy Consultant to ensure that the project meets the Office of Public School Construction ("OPSC") requirements for inclusion in the special energy funding pool available to the District. This will require special design and coordination of the project design with the District's Consultant.
- (vi) Plumbing systems fully designed with all piping and system elements indicated. Plumbing Fixture Schedule fully completed with District reviews and approvals for all specified systems completed.
- (vii) Complete design of Energy Management System ("EMS")."

**c. Food Service**

- (i) Completed, fully developed, detailed, and coordinated Food Services documents for the project.

- (A) All equipment scheduled and coordinated with power, fire suppression, exhaust, control, mounting, wiring, and finishing details and standards included in the documents.
- (B) Materials scheduled, and list of equipment and fixtures schedules indicating Energy Star appliances.
- (C) Final review by the Contra Costa Health Department must be completed prior to completion of the Construction documents phase.

d. **Electrical**

- (i) Lighting, power, signal and communications plans showing all switching and controls. Fixture schedule and lighting details completed. Include any updated photometrics to demonstrate meeting of EQ 1.1 Daylighting.
- (ii) Distribution information on all power consuming equipment, including lighting, power, signal and communication device(s) branch wiring completed.
- (iii) All electrical equipment schedules completed.
- (iv) Special system components plans completed.
- (v) Electrical load calculations completed.
- (vi) Complete design of low voltage systems. Low voltage systems include fire alarm system, security system, clock and public address system, voice data system, and telecom/technology system.
  - (A) Completed system designs to include riser diagrams, single line diagrams, logic and system structure diagrams.
  - (B) Completed low-voltage system specifications and manufacturer requirements incorporated into the documents.
- (vii) WAN and LAN systems and components fully design and completely developed and detailed to indicate network utility connections, sizes and locations of pull/pull boxes, site and routing for all underground system components, sizes and locations, and layouts of MDF spaces and individual building or floor IDF locations, proposed in-building routing approaches, completed and scheduled room LAN components, including computer locations, presentation technology elements, Centralized Voice System components. Final material and product specifications completed after coordination with the District's Technology Consultant.

e. **Civil**

Fully defined development of on and off site utility systems for sewer, electrical, water, stormwater management, storm drain and fire water. Including, without limitation, pipe sizes, materials, invert elevation location and Installation details for all civil and site utility systems.

- (i) Fully coordinated and completed construction documents showing the work of the project with each of the major Utility service providers. Indicate to District that each of the listed major Utility service providers has reviewed the project work and approved routing, connections, and on-site improvements and off-site connections as meeting the providers design standards.

- (A) PG&E
- (B) EBMUD
- (C) SBC
- (D) Comcast
- (E) Local Sanitary District and other Municipal Utility Systems.

Fully completed details approved by and reviewed with each of the providers incorporated into the project.

Fire access routes, fire water systems fully approved and coordinated with local agencies having jurisdiction.

All site plans, site utilities, parking, bike lanes, walkway, accommodations and utilities for applicable temporary housing, and roadway systems fully completed and detailed.

f. **Landscape**

All landscape, hardscape, stormwater management, and irrigation plans updated to reflect update revisions from Design Development Phase Documents.

g. **Construction Cost Budget**

- h. Working with the Design Phase Manager and the Program Manager, who shall have primary responsibility to prepare Cost Estimates for the project, review the Construction Cost Budget for the Project. Along with the conditions identified in the Agreement and the preceding Phases, the following conditions apply to the revised Construction Cost Budget for the Construction Documents Phase:

- i. Construction Documents Estimate: This further revised estimate shall be prepared by specification section, summarized by CSI category and divided by trade and work item. The estimate shall include individual item unit costs of materials, labor and equipment. Sales tax, contractor's mark-ups, and general conditions shall be listed separately.

- j. The Construction Cost Budget for the Project must at no point exceed the District's Construction Budget for the Project. The accuracy of the Construction Cost Budget shall be the primary responsibility of the Design Phase Manager and the Program Manager. The Architect shall participate in Estimate review and shall accept the Construction Cost Budget as reflected in the Cost Estimate updates at this and each phase. However, if Architect believes that the Design Phase Manager estimates are inaccurate, Architect shall inform the District of such belief. If the Cost Estimate exceeds the District's Construction Budget, Architect shall recommend revisions to bring the Design within budget, and/or provide Life Cycle Analysis to demonstrate long-term cost-savings for evaluation with District.

- (i) At this stage of the design, the Construction Cost Budget may include design contingencies of no more than 0% in the cost estimates.

k. **Specifications**

- (i) Complete development and final preparation of technical specifications describing materials, systems and equipment, workmanship, quality and performance criteria required for the construction of the Project in accordance with Section 2.17 of this Agreement.
- (ii) No part of the specifications shall call for a designated material, product, thing, or service by specific brand or trade name unless:
- (A) The specification is followed by the words "or equal" so that bidders may furnish any equal material, product, thing, or service, as required by Public Contract Code, section 3400, or
- (B) The designation is allowable by a specific allowable exemption or exception pursuant to Public Contract Code, section 3400
- (iii) Specifications shall not contain restrictions that will limit competitive bids other than those required for maintenance convenience by the District and only with District's prior approval.
- (iv) At one hundred percent (100%) review, District shall review the specifications and shall direct Architect to make corrections at no cost to the District.
- (v) Coordination of the Specifications with specifications developed by other disciplines.
- (vi) Specifications shall be in CSI format

(vii) Architect shall review and incorporate the Division 0 and Division 1 Specifications developed by the District into the Project documents.

(A) Architect shall prepare and complete sections of the Division 1 as required by the District for the Project: Summary of Work, or any other Divisions which may require the Architect's input for the full coordination of the Project documents.

**l. Constructability Review**

The District shall conduct a Constructability review of the Construction Documents. A report shall be given to the Architect who shall make necessary changes along with providing written comments for each item listed in the report.

1. Architect and all sub-consultants shall attend Constructability review meeting(s) to review comments and after completion of changes to the documents shall meet with the reviewers and confirm that all applicable comments have been incorporated into the plans.

a. Incorporation of the comments shall be in a timely fashion coordinated with the completion of DSA Backcheck comments to provide the District with a fully coordinated set of documents for bidding and construction.

**m. Deliverables and Numbers of Copies**

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

(2) Reproducible copies of working drawings

(2) Specifications,

(2) Updated CHPS/HPI scorecard(s) with full documentation for all Prerequisites and Credits targeted, including final Acoustics Performance and Daylighting analysis documentation for CHPS credits EQ 3.1, and EQ 1.1 updated to reflect final Design

(2) Updated T24 whole building energy analysis plus for submittal for PG&E's Savings By Design rebate program, reflecting final Design plus list of Energy Conservation Measures (ECMs) incorporated.

(2) Response to Commissioning agent's comments on Final Design

(2) Engineering calculations

- (2) A statement indicating acceptance of the Revised Construction Cost Budgets developed and reconciled during this phase.
- (2) Statement of requirements for testing and inspection of service for compliance with Construction Documents and applicable codes.
- (2) DSA file including all correspondence, meeting, back check comments, checklists to date.
- (2) A statement indicating any authorized changes made to the design from the last Phase and the cost impact of each change on the previously approved Construction Cost Budget. If no design changes occur but shifts of costs occur between disciplines, identify for District review.

**3. Construction Documents (CD) Final Back-Check Stage**

- a. The Construction Documents final back-check stage shall be for the purpose of the Architect incorporating all regulatory agencies' comments and all Owner and any Commissioning Agent's review comments into the drawings, specifications, and estimate. All changes made by the Architect during this stage shall be at no additional cost to the District.
- b. The final contract documents delivered to the District upon completion of the Architect's work shall be the Bid Set and shall consist of the following:
  - (I) Drawings: Original copies of all drawings with each Architect/consultant's State license stamp.
  - (II) Drawings: Electronic format submitted to the District on PS2.
  - (III) Specifications: Original word-processed technical specifications on reproducible masters in CSI format.
- c. Architect shall update and refine the consultants' completed Construction Documents.
- d. Architect shall submit final CHPS/HPI scorecard(s) as approved by DSA/HPI with any DSA/HPI correspondence and final HPI-1 form, as well as approved CHPS Verified Design credits, if applicable, with any additional documentation submitted for all Prerequisites and Credits targeted.
- e. **Meetings** During this Phase, Architect shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below.

- **BIDDING PHASE**

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

1. Assist the District during the Bidding Phase by coordinating responses to questions related to the drawings and specifications for the Project.
2. In conjunction with the Design Phase Manager and the Program Manager who shall have primary responsibility for Bidding Phase management, coordinate the development of the bidding timing, walkthroughs, procedures and be responsible for the construction contract documents prepared for the District.
3. While the Project is being advertised for bids, all questions concerning intent shall be referred to the District for screening and subsequent processing through Architect.
4. In the event that items requiring interpretation of the drawings or specifications are discovered during the bidding period, those items shall be analyzed by the Architect for decision by the District as to the proper procedure required. Corrective action will be in the form of an addendum prepared by the Architect and issued by the District.
  - a. Coordinate issuance of all Addenda for the project with the Program Manager. Meet all legally required deadlines for information changes to bidders.
5. Attend bid opening.
6. Coordinate with sub-consultants regarding updates, modifications, changes, and Addenda to the drawings.
7. Respond to District questions and clarifications.
8. Assist the district in completing Architect's portions of any SAB forms with HPI-1 forms attached, for OPSC funding.
9. **Deliverables and Number of Copies**

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

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

• **CONSTRUCTION ADMINISTRATION PHASE**

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

1. The Architect's responsibility to provide basic services for the Construction Phase under the Agreement commences with the award of the contract for construction and terminates upon satisfactory performance and completion of all tasks in this phase and commencement of the Closeout Phase, or upon the District's terminating the Agreement, whichever is earlier.
2. During construction, the Architect shall furnish all necessary additional drawings for supplementing, clarifying, and/or correcting purposes and for change orders. The District shall request these drawings from the Architect and shall be at no additional cost unless designated as Extra Services by the District. The original tracing(s) and/or drawings and contract wording for change orders shall be submitted to the District for duplication and distribution.
3. **Submittals**
  - a. Architect shall review and take appropriate action upon contractor's submittals such as: shop drawings, Project data, samples and change orders, but only for the limited purpose of checking for conformance with information given and the design concept expressed in the contract documents, including documented CHPS/HPI credits..
  - b. The Architect's action upon contractor's submittals shall be taken as expeditiously as possible so as to cause no unreasonable delay in the Project or in the work of separate contractors, while allowing sufficient time in the Architect's professional judgment to permit adequate review. In no case shall the review period associated with a single, particular submittal exceed twenty-one (21) calendar days from its receipt by the Architect. Architect's response to each submittal shall be a substantive and acceptable response. This 21-day time period shall not include time when a submittal is within the District's control or if the submittal is being reviewed by DSA. In no way does this provision reduce the Architect's liability if it fails to prepare acceptable documents.
4. **RFIs**
  - a. During the course of construction, all Requests for Information ("RFI") must be responded to as expeditiously as possible so as not to impact and delay the construction progress. In no case shall the review period associated with an RFI exceed seven (7) calendar days from the receipt by the Architect. Architect's response to each RFI shall be a substantive and acceptable response. This 7-day time period shall not include time when a submittal is within the District's control or if the submittal is being reviewed by DSA. In no way does this provision



reduce the Architect's liability if it fails to prepare acceptable documents.

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

These drawings [or corrected specifications] have been prepared based on information submitted, in part, by others. The Architect has provided a review consistent with its legal standard of care.
8. **O&M Manuals / Warranties.** Architect shall review equipment, operation and maintenance manuals, and a complete set of warranty documents for all equipment and installed systems, to ensure that they meet the requirements of the plans and specifications.
9. Architect shall also provide, at the District's request and at no additional cost to the District, architectural/engineering advice to the District on start-up, break-in, and debugging of facility systems and equipment, and apparent deficiencies in construction following the acceptance of the contractor's work for a period of six months following the completion of work.
10. Recommendations of Payment by Architect constitute Architect's representation to the District that work has progressed to the point indicated to the best of Architect's knowledge, information, and belief, and that the quality of the work is in general conformance with the contract documents.
11. **Deliverables and Number of Copies**

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

- (2) Meeting report/minutes from kick-off meeting;
- (2) Observation reports;
- (2) Weekly meeting reports which reflect substantive Architectural, Commissioning or CHPS/HPI issues discussed.
- (2) Final acoustics performance testing report and CHPS/HPS documentation to verify CHPS EQ 3.1 is met.

**12. Meetings**

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

• **CLOSE OUT PHASE**

1. As the Construction Administration Phase progresses, the Architect shall perform the following Close Out Phase services for the District as required:
  - a. Architect shall review the project and observe the construction as required to determine when the contractor has completed the Project and shall prepare punch lists of items that remain in need of correction or completion.
  - b. Architect shall collect from the contractor, review, and forward to the District all written warranties, operation manuals, spare parts, lien waivers, and Certificates of Inspection and Occupancy with Architect's recommendation as to the adequacy of these items.
  - c. Architect shall prepare or collect, as applicable, and provide to DSA, all reports required by DSA on the Project.
  - d. Architect shall obtain all required DSA approval on all change orders and addenda to the contractor's contract. Final Closeout and Certification of the Project with the DSA shall be a condition precedent to the Architect receiving final payment on the project.
  - e. Architect shall prepare a final verified report for the Project.
  - f. Architect shall prepare a set of As-Built Drawings for the Project utilizing the Record Drawings.
  - g. Architect shall review and prepare a package of all warranty and M&O documentation.

- h. Architect shall organize electronic files, plans and prepare Project binder.
  - i. Architect shall coordinate all Services required to close-out the Project with the District and between consultants.
  - j. Architect shall, prior to final payment and at its own expense, provide the District with two copies on CD-ROM of the final DSA approved, bound .DWG, .PDF or .TIF format Drawings.
- 2. The District shall prepare and record with the County Recorder a Notice of Completion for the Project.
- 3. **Deliverables and Number of Copies**
  - (2) Punch lists for each site before any Building Flush-out
- 4. **Meetings**

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

• **MEETINGS / SITE VISITS / WORKSHOPS**

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

2. **General Meeting, Site Visit, and Workshop Requirements**

- a. Architect shall always be prepared to answer questions and issues from District staff, site staff, potential bidders, and/or contractors, as applicable.
- b. Architect shall maintain a log of all meetings, site visits or site observations held in conjunction with the work of this Project, with documentation of major discussion points, observations, decisions, questions or comments. These shall be furnished to the District and/or its representative for inclusion in the overall Project documentation.
- c. As required, Architect shall provide to the District copies of all documents or other information needed for each meeting, site visit, and workshop. These copies shall be a reimbursable expense.
- d. Meeting times shall be as required to complete the work and shall be held at the District office or at one of the Project sites, unless otherwise indicated.

3. **Meetings During Project Initiation Phase**

- a. Within the first week following execution of the Agreement, the Architect shall participate in one Project kick-off meeting for all sites to determine the Project Intent, scope, budget and timetable, which shall encompass the following:
  - (i) The Architect, its appropriate consultant(s), and District staff, shall attend the meeting.
  - (ii) The Project kick-off meeting will introduce key team members from the District and the Architect to each other, defining roles and responsibilities relative to the Project.
  - (iii) During this meeting, the Architect shall:
    - (A) Identify and review pertinent information and/or documentation necessary from the District for the completion of the Project.

- (B) Review and explain the overall Project goals, general approach, tasks, work plan and procedures and deliverable products of the Project.
  - (C) Review and explain the scope of work and Project work plan for all parties present; determine any adjustments or fine tuning that needs to be made to the work plan.
  - (D) Review documentation of the Project kick-off meeting prepared by the District's representative and comment prior to distribution.
- 4. **Initial Site Visits meetings and site reviews as required without limitation to correctly inventory and identify all pertinent elements of the existing site and buildings for consideration as a part of the Project.**
  - a. Architect shall visit the Project sites to complete a visual inventory and documentation of the existing conditions.
- 5. **Meetings During Architectural Program**
  - a. Architect shall participate in one public community information site meeting, per site, to receive input from the community regarding its wishes and expectations regarding the design of Architect's work on the Project and the schedule of use of the sites during construction.
  - b. Architect shall conduct one site visit/meeting, per site, with the District's facilities team to gather information from District facilities team and site personnel and to make a visual presentation regarding the Project.
  - c. Electrical, civil, mechanical, structural, landscaping, and estimating consultant(s) shall participate in these meetings as appropriate and shall provide input and feedback into the development of the Construction Cost Budget.
- 6. **Meetings During Schematic Design Phase**
  - a. Within the first two weeks following the start of the Schematic Design Phase, Architect shall conduct ongoing design meetings, with the District's facilities team and site personnel to complete a basic design framework of the Project. These workshops (Site Committee Meetings) shall be ongoing and may include several meetings and shall not be concluded until the principal has indicated his or her acceptance with the Architect's preliminary design. These Site Committee Meetings shall include the following:
    - (i) Architect shall designated its team member duties and responsibilities;
    - (ii) Architect and District shall review District goals and expectations;

- (iii) District shall provide input and requirements;
- (iv) Architect and District shall review Project scope and budget;
- (v) Architect shall, on an ongoing basis, prepare updated plans, drawings, sketches, renderings to respond to proposed Project configurations during this phase;
- (vi) Prepare and/or revise the scope of work list and general workplan from the Pre-Design Phase, for documentation in a computer-generated Project schedule;
- (vii) Establish and agree regarding methods to facilitate the communication and coordination efforts for the Project.

**7. Meetings During Design Development Phase**

- a. At the time designated for completion of the Design Development package, Architect shall conduct ongoing meetings, per package of submittal, as required to complete the work of this phase, with the District to review the following:
  - (I) Present the Design Development package for review and comment to proceed with preparation of final plans and specification.
  - (II) Architect and District shall review Project scope and budget.
- b. **Value Engineering Workshop**

If the Project is shown to be over the District approved construction cost budget, the Architect shall participate in and coordinate with up to two (2) value engineering workshops, as requested by the District, including all Architect's consultant(s), the District, and the Construction Manager during the Design Development Phase.

**8. Meetings During Construction Documents Phase**

- a. Prior to the fifty percent (50%) CD design package, Architect shall conduct meetings as required, per package of submittal, with the District to revise the Design Development package and receive comments.
- b. **50% CD Review Meeting.** In lieu of a 50% CD submittal, the Architect shall initiate and coordinate an in-house 50% CD review with the District, Construction Manager, Design Phase Managers. This review shall include mandatory attendance by all of the Architect's sub-consultants and each shall present work-in-progress drawings, specifications, tables, calculations, sketches or other material clearly indicating that the work has progressed to the 50% CD phase.

- c. After the time designated for completion of the fifty percent (50%) submittal package, Architect shall conduct additional meetings, per package or submittal, with the District to review the following:
  - (i) Not used
  - (ii) Architect and District shall provide further review of Project scope and budget;
- d. At the time designated for completion of the one hundred percent (100%) Construction Document package, Architect shall conduct meetings as required, per package or submittal, with the District to review the following:
  - (I) Present the hundred percent (100%) Construction Document package for review and comment to proceed with preparation of final plans and specification.
  - (II) Architect and District shall provide further review of Project scope and budget.

**9. Meetings During Bidding Phase**

- a. Attend and take part in 2 pre-bid meetings with all potential bidders, District staff, and Program Manager, the Construction Manager and/or Design Phase Manager.
- b. Conduct one kick-off meeting, per site, with the successful bidder for each project package, District staff, and Program Manager, Construction Manager to finalize the roles and responsibilities of each party and provide protocols and processes to follow during construction.

**10. Meetings During Construction Administration Phase, plus weekly project meetings until entire project is complete.**

- a. Architect shall visit the Project site as necessary or when requested, and in no case less than once per week, sufficient to determine that the Project is being constructed in accordance with the plans and specifications, and to resolve discrepancies in the contract documents and to monitor the progress of the Project. Architect may coordinate these site visits so that it observes more than one site on one site visit to the District.
- b. Conduct weekly project meetings with District staff to review with District staff the progress of the work. Construction phase meetings shall be as required to complete the work in conformance with the District's proposed schedule for construction, for each of the project phases identified. Extension of the established construction schedule may be justification for additional services unless such extension is the result of the Architect's negligence, errors, or omissions.

- c. Architect shall ensure that consultant(s) visit the site in conformance with their agreement and that sub-consultant agreements shall reference District requirements for Construction Phase services.

**11. Citizens' Bond Oversight Committee Meetings**

Architect acknowledges that the Project is subject to oversight by the District's citizen bond oversight committee. Architect shall, at the District's direction, attend one District citizen bond oversight committee meeting and present the Architect's design to the District's citizen bond oversight committee for review and recommendation to the District's governing board.

**12. Governing Board Meetings**

Architect acknowledges that the District's governing board must approve all designs. Architect shall, at the District's direction, attend up to two District governing board meeting(s) and present the Architect's design to the District's governing board for review and approval.



## EXHIBIT "B"

### CRITERIA AND BILLING FOR EXTRA WORK

The following Extra Work to the Agreement shall be performed by Architect if needed and if authorized or requested by the District:

- A. Making revisions in drawings, specifications, or other documents when such revisions are:
  - 1. Inconsistent with approvals or instructions previously given by the District.
  - 2. Required by the enactment or revisions of codes, laws, or regulations subsequent to the preparation of the Conforming Set.
  - 3. Due to changes required as a result of the District's failure to respond to a written request from the Architect within a reasonable time, as requested by Architect.
- B. Providing Work required because of significant documented changes in a Project initiated by the District, including but not limited to size, quality, complexity, the District's schedule, or method of bidding or negotiating and contracting for construction.
- C. Providing consultation concerning replacement of work damaged by fire or other cause during construction and furnishing Work required in connection with replacement of that work.
- D. Providing Work made necessary by the default of contractor(s), by major defects, or deficiencies in the work of contractor(s).
- E. In the absence of a final Certificate of Payment or Notice of Completion, providing Work more than sixty (60) days after the date of completion of work by contractor(s) and after Architect has completed all of its obligations and tasks under the Agreement.
- F. Providing deliverables or other items in excess of the number indicated in Exhibit "A." Before preparing, providing, sending, or invoicing for extra deliverables, Architect shall inform the District that expected deliverables may be in excess of the number indicated in Exhibit "A," so that District can procure the additional deliverables itself or direct Architect to procure the deliverables at District's expense or on District's account at a specific vendor.
- G. Providing Work as directed by the District that are not part of the Work of this Agreement.
- H. Providing Work as an expert and/or witness for the District in any mediation, arbitration, and/or trial in which the Architect is (1) not a party, and (2) did not in any way cause the dispute that is being adjudicated.
- I. Providing training, adjusting, or balancing of systems and/or equipment

- J. The following rates, which include overhead, administrative cost and profit, shall be utilized in arriving at the fee for extra Work and shall not be changed for the term of the Agreement.

<u>Job Title</u>	<u>Hourly Rate</u>
Principal In Charge:	\$200.00
Project Director:	\$165.00
Project Manager:	\$130.00
Project Designer:	\$122.00
Project Architect:	\$105.00 - \$155.00
Construction Administrator:	\$120.00 - \$155.00
Draftsperson:	\$100.00 - \$115.00
Technical/Production Assistant:	\$75.00 - \$110.00

- K. The mark-up on any approved item of Extra Work shall not exceed five percent (5%).

## EXHIBIT "C"

### SCHEDULE OF WORK

- A. Promptly after the execution of this Agreement, the Architect shall prepare and submit for approval to the District a Schedule of Work showing the order in which Architect proposes to carry out Architect's work ("Schedule of Work"). The Schedule of Work shall apply to the completion of all Work listed hereunder within the times established by this Agreement. The Schedule of Work shall be in the form of a progress chart clearly delineating all important increments and review dates. Architect shall update the Schedule of Work on a monthly basis and deliver two (2) copies to the District along with the monthly billing.
- B. Architect shall complete all Work and Services required under the Development of Architectural Program section within 30 calendar days after written authorization from the District to proceed.
- C. Architect shall complete all Work and Services required under the Schematic Design Phase within 90 calendar days after written authorization from District to proceed.
- D. Architect shall complete all Work and Services required under the Design Development Phase within 120 calendar days after receipt of a written authorization from District to proceed.
- E. Architect shall complete all Work and Services required under Construction Documents Phase within 210 calendar days after written authorization from the District to proceed, and as more specifically indicated below. Excluded from this duration is the time associated with the Construction Documents back-check stage.
- |    |   |                           |
|----|---|---------------------------|
| 1. | 50% Submittal Package                                 | <u>75</u> <u>calendar</u> |
|    | <u>days</u>   |                           |
| 2. | 100% Submittal Package                                | <u>75</u> <u>calendar</u> |
|    | <u>days</u>   |                           |
| 3. | Final Contract Documents after Final Back-Check Stage | <u>60</u> <u>calendar</u> |
|    | <u>days</u>   |                           |
- F. The durations stated above include the review periods required by the District and all other regulatory agencies.
- G. All times to complete tasks set forth in this Exhibit are of the essence, as indicated in the Agreement. If delays in the Schedule of Work are imposed by the District's inability to comply with requested meeting schedules, Architect shall maintain the right to request an adjustment in the Schedule of Work if deemed necessary to meet the deadlines set forth in this Exhibit. If approved, those extensions shall be authorized in writing by the District.

## EXHIBIT "D"

### PAYMENT SCHEDULE

#### A. Compensation

1. The payment of consideration to Architect as provided herein shall be full compensation for all of Architect's Work incurred in the performance hereof, including, without limitation, all costs for personnel, travel within two hundred (200) miles of a Project location, offices, per diem expenses, printing and shipping of deliverables in the quantities set forth in Exhibit "A," or any other direct or indirect expenses incident to providing the Work. Except as expressly set forth in the Agreement and Exhibit "B," there shall be no payment for extra costs or expenses.
2. The total compensation to Architect shall be as stated in Article 6 of the Agreement.
3. District shall pay Architect as follows for all Work contracted for under this Agreement:

PERCENTAGE OF TOTAL FEE PER PHASE	
Phase	Phase Amount
Pre-Design/Architectural Program Development Phase	2.5%
Schematic Design Phase	10%
Design Development Phase	17.5%
Construction Documents Phase-Submittal to DSA	30%
Approval by DSA	5%
Bidding Phase	2%
Construction Administration Phase	23%
Close Out Phase	10%
Generate Punch List	2%
Sign Off On Punch List	2%
Receive and Review All M & O Documents	2%
Filing All DSA Required Close Out Documents	2%
Receiving DSA Close Out, including DSA approval of the final As-Built set of drawings	2%
<b>TOTAL BASE COMPENSATION</b>	<b>100%</b>

#### B. Method of Payment

1. Invoices shall be on a form approved by the District and are to be submitted in triplicate to the District via the District's authorized representative.
2. Architect shall submit to District on a monthly basis documentation showing proof that payments were made to its consultant(s).
3. Architect shall submit to the District for approval a copy of the Architect's monthly pay request format.
4. Upon receipt and approval of Architect's invoices, the District agrees to make payments within thirty (30) days of receipt of the invoice as follows:

a. **Pre- Design/Architectural Program Development Phase:**

Monthly payments for the percentage of Work complete up to ninety-five percent (95%) of the fee for the Phase; one hundred percent (100%) payment upon acceptance and approval of the Pre-Design/Architectural Program.

b. **For Schematic Design Phase:**

Monthly payments for the percentage of Work complete up to ninety-five percent (95%) of the fee for the Phase; one hundred percent (100%) payment upon acceptance and approval of the Schematic Design Phase by the District.

c. **For Design Development Phase:**

Monthly payments for the percentage of Work complete up to ninety-five percent (95%) of the fee for the Phase; one hundred percent (100%) payment upon acceptance and approval of the Design Development Phase by the District.

d. **For Construction Documents Phase:**

Monthly payments for percentage of Work complete up to ninety-five percent (95%) of the fee for the phase; one hundred percent (100%) payment upon acceptance and approval of the Construction Documents Phase by the District.

e. **For Bidding Phase:**

Monthly payments for the percentage of Work complete up to ninety-five percent (95%) of the fee for the phase; one hundred percent (100%) payment upon the District's award of the bid.

f. **For Construction Administration Phase:**

Monthly payments for the percentage of Work complete up to ninety-five percent (95%) of the fee for the phase; one hundred percent (100%) payment upon the District's notice of completion.

g. **For Close Out:**

Lump sum payment thirty-five (35) days after completion of all items in this phase.

h. **Format and Content of Invoices:**

Architect acknowledges that the District requires Architect's Invoices to include detailed explanations of the Work performed. For example, a six hour charge for "RFIs and CORs" is unacceptable and will not be payable. A more detailed explanation, with specificity, is required. This includes a separate entry for each RFI, PCO, and change order.

For example, the following descriptions, in addition to complying with all other terms of this Agreement, would be payable. The times indicated below are just placeholders:

Review RFI 23; review plans and specifications for response to same; prepare responses to same and forward to contractor, district, construction manager, and project inspector.	.8 hours
Review COR 8; review scope of same and plans and specifications for appropriateness of same; prepare draft change order and language for same.	.7 hours
Review COR 11; review scope of same and plans and specifications for appropriateness of same; prepare rejection of COR 11 for review by district, CM, IOR,	1.2 hours

## EXHIBIT "E"

### INSURANCE REQUIREMENTS

- A. Architect shall procure prior to commencement of the Work of this Agreement and maintain for the duration of the Agreement insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Work hereunder by the Architect, his agents, representatives, employees and consultant(s). Architect's liabilities, including but not limited to Architect's Indemnity obligations, under this Agreement, shall not be deemed limited in any way to the insurance coverage required herein. Maintenance of specified insurance coverage is a material element of this Agreement and Architect's failure to maintain or renew coverage or to provide evidence of renewal during the term of this Agreement, as required or when requested, may be treated as a material breach of contract by the District.
- B. **Minimum Scope and limits of Insurance:** Coverage shall be at least as broad as the following scopes and limits:
1. **Commercial General Liability.** One million dollars (\$1,000,000) per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to each project/location or the general aggregate limit shall be twice the required occurrence limit.
  2. **Commercial Automobile Liability, Any Auto.** One million dollars (\$1,000,000) per accident for bodily injury and property damage.
  3. **Workers' Compensation Liability.** For all of the Architect's employees who are subject to this Agreement and to the extent required by the applicable state or federal law, the Architect shall keep in full force and effect, a Workers' Compensation policy. That policy shall provide employers' liability coverage with minimum liability coverage of One million dollars (\$1,000,000) per accident for bodily injury or disease. The Architect shall provide an endorsement that the insurer waives the right of subrogation against the District and its respective elected officials, officers, employees, agents, representatives, consultants, trustees, and volunteers.
  4. **Employers' Liability.** For all of the Architect's employees who are subject to this Agreement and to the extent required by the applicable state or federal law, the Architect shall keep in full force and effect, an Employment Practices Liability policy. That policy shall provide employers' liability coverage with minimum liability coverage of One million dollars (\$1,000,000) per occurrence. The Architect shall provide an endorsement that the insurer waives the right of subrogation against the District and its respective elected officials, officers, employees, agents, representatives, consultants, trustees, and volunteers.
  5. **Professional Liability.** This insurance shall cover the prime design professional and his/her consultant(s) for Two million dollars (\$2,000,000)

aggregate limit subject to no more than Fifty thousand dollars (\$50,000) per claim deductible, coverage to continue through completion of construction plus two years thereafter.

- C. The District reserves the right to modify the limits and coverages described herein, with appropriate credits or changes to be negotiated for such changes.
- D. **Deductibles and Self-Insured Retention:** The Architect shall inform the District in writing if any deductibles or self-insured retention exceeds \_\_\_\_\_ thousand dollars (\$\_\_\_\_,000). At the option of the District, either:
1. The District can accept the higher deductible;
  2. The Architect's Insurer shall reduce or eliminate such deductibles or self-insured retention as respects the District, its officers, officials, employees and volunteers; or
  3. The Architect shall procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses.
- E. **Other Insurance Provisions:** The general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:
1. The District, the District's Program Manager, Construction Manager, or both, their representatives, consultants, trustees, officers, officials, employees, agents, and volunteers ("Additional Insureds") are to be covered as additional insureds as respects liability arising out of activities performed by or on behalf of the Architect; instruments of Service and completed operations of the Architect; premises owned, occupied or used by the Architect; or automobiles owned, leased, hired or borrowed by the Architect. The coverage shall contain no special limitations on the scope of protection afforded to the Additional Insureds.
  2. For any claims related to the projects, the Architect's insurance coverage shall be primary insurance as respects the Additional Insureds. Any insurance or self-insurance maintained by the Additional Insureds shall be in excess of the Architect's insurance and shall not contribute with it.
  3. Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to the Additional Insureds.
  4. The Architect's insurance shall apply separately to each Insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.
  5. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be suspended, voided, canceled by either party, reduced in coverage or in limits except after thirty (30) days prior written notice by certified mail, return receipt requested, has been given to the District.
- F. **Acceptability of Insurers:** Insurance is to be placed with insurers admitted in California with a current A.M. Best's rating of no less than A:VII. The Architect shall



Inform the District in writing if any of its insurer(s) have an A.M. Best's rating less than A:VII. At the option of the District, either:

1. The District can accept the lower rating; or
2. Require the Architect to procure Insurance from another insurer.

**G. Verification of Coverage:** Architect shall furnish the District with:

1. Certificates of insurance showing maintenance of the required insurance coverage; and
2. Original endorsements affecting general liability and automobile liability coverage. The endorsements are to be signed by a person authorized by that insurer to bind coverage on its behalf. All endorsements are to be received and approved by the District before Work commence.

<b>ACORD. CERTIFICATE OF LIABILITY INSURANCE</b>		DATE (MM/DD/YY) 1/29/2014
<b>PRODUCER</b> Dealey, Renton & Associates P. O. Box 12675 Oakland, CA 94604-2675 510 465-3090		THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.
<b>INSURED</b> HKIT Architects 538 Ninth Street, Suite 240 Oakland, CA 94607		<b>INSURERS AFFORDING COVERAGE</b> INSURER A: Hartford Casualty Insurance Co. INSURER B: American Automobile Ins. Co. INSURER C: XL Specialty Insurance Co. INSURER D: INSURER E:

## COVERAGES

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

INSR LTR	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS
A	<b>GENERAL LIABILITY</b> <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC	57SBWL1922	08/28/13	08/28/14	EACH OCCURRENCE \$1,000,000 FIRE DAMAGE (Any one fire) \$300,000 MED EXP (Any one person) \$10,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMPROP AGG \$2,000,000
A	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	57SBWL1922	08/28/13	08/28/14	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	<b>GARAGE LIABILITY</b> <input type="checkbox"/> ANY AUTO				AUTO ONLY - EA ACCIDENT \$ OTHER THAN EA ACC \$ AUTO ONLY: AGG \$
	<b>EXCESS LIABILITY</b> <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE DEDUCTIBLE \$ RETENTION \$				EACH OCCURRENCE \$ AGGREGATE \$ \$ \$ \$
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>	WZP81012110	09/01/13	09/01/14	<input checked="" type="checkbox"/> WC STATUS- TORY LIMITS <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
C	<b>OTHER Professional Liability</b>	DPR9709637	08/28/13	08/28/14	\$1,000,000 per Claim \$2,000,000 Annl Aggr.

## DESCRIPTION OF OPERATION(S)/LOCATION(S)/VEHICLE(S)/EXCLUSIONS ADDED BY ENDORSEMENT/SPECIAL PROVISIONS

General Liability Policy excludes claims arising out of the performance of professional services.

PROJECT: Glenview Renovation

Oakland Unified School District and its directors, officers, employees, agents and representatives are named as Additional Insureds to General Liability per policy form wording.

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

Insured: HKIT Architects  
Insurer: Hartford Casualty Insurance Co.  
Policy Number: 57SBWL1922  
Policy Effective Date: 08/28/13

Additional Insured: PROJECT: Glenview Renovation Oakland Unified School District and its directors, officers, employees, agents and representatives

EXCERPTS FROM: Hartford Form SS 00 08 04 05

## BUSINESS LIABILITY COVERAGE FORM

### C. WHO IS AN INSURED

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

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

##### f. Any Other Party

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

(a) In the performance of your ongoing operations;

(b) In connection with your premises owned by or rented to you; or

(c) In connection with "your work" and included within the "products-completed operations hazard, but only if

(i) The written contract or written agreement requires you to provide such coverage to such additional insured; and

(ii) This Coverage Part provides coverage for "bodily injury" or "property damage" included within the "products-completed operations hazard.

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

### E.5. Separation of Insureds

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

a. As if each Named Insured were the only Named Insured; and

b. Separately to each insured against whom a claim is made or "suit" is brought.

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

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

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

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

EXCERPT FROM Hartford Form SS 04 38 06 01

### HIRED AUTO AND NON-OWNED AUTO

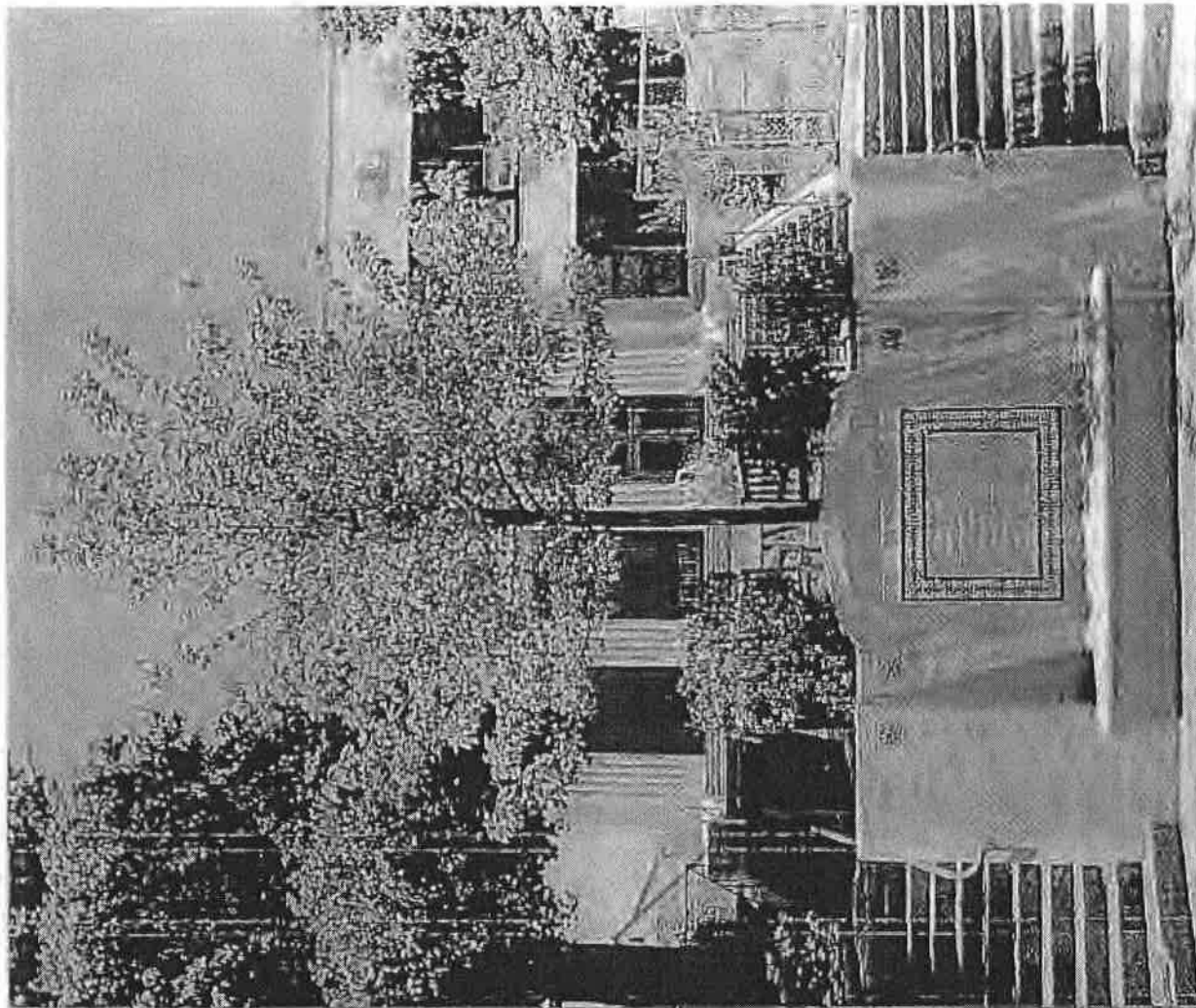
B. With respect to the operation of a "non-owned auto", WHO IS AN INSURED is replaced by the following: The following are "insureds":

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



# GLENVIEW ELEMENTARY SCHOOL

OAKLAND UNIFIED SCHOOL DISTRICT



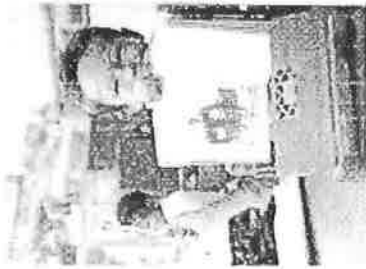
HKIT

NOVEMBER 15 2013



## MASTER PLAN OBJECTIVES

- To assess the feasibility of modernizing the existing building including seismically upgrading structures and replacing the existing portables or building all new construction
- To respond to AB300 Seismic Guidelines
- To meet District standards for 21<sup>st</sup> Century Learning environments and high quality neighborhood schools



## STEPS

- Engage with District, Site Staff, Parents and Students
- Evaluate Existing Conditions
- Develop Building Program
- Create Vision for Campus
- Develop and Refine Plan Options with Users
- Provide Cost Estimating for two Options
- Provide Recommendation





# INPUT

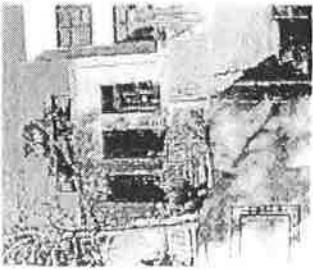
Gather Input and Review Options with:

- District Staff
- School Site Core Committee  
(Principal, Teachers, PTA, Parents, District Staff)
- School Site Staff
- Students
- Parents



INPUT

MASTER PLANNING PROCESS



# PROGRAMMING

- K-5 School for 524 Students
- 3 Classrooms per Grade Level
- Flex Classroom
- Special Needs Preschool and Special Needs K-5
- Administration, Multi-Purpose and Library
- Support Spaces
- Outdoor Assembly and Play Areas (Lower Play Yard and Garden to remain)





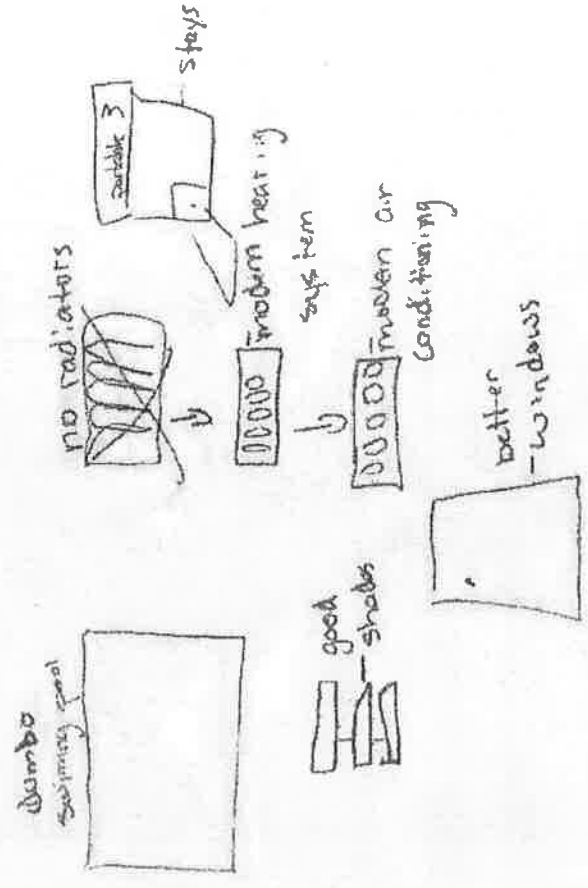
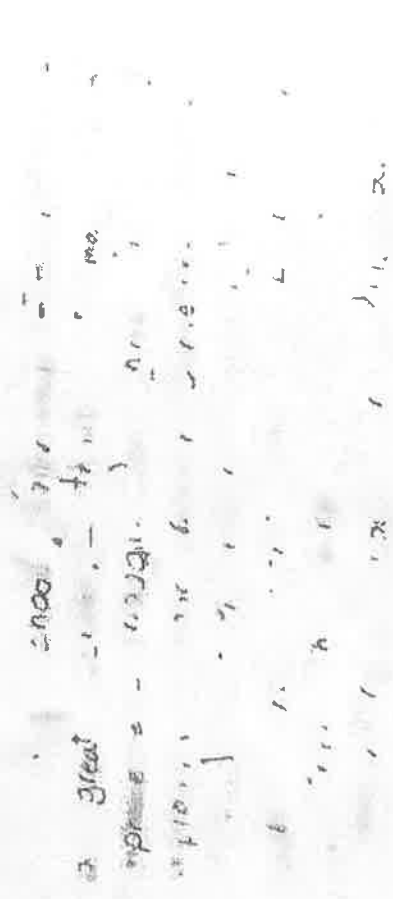
## EXISTING CONDITIONS

### Existing Deficiencies (March 6)

- Auditorium has become tight, has acoustic problems
- Very poor heating & cooling
- Administration is too small
- Lacking sinks in classrooms
- Teachers' storage lacking
- Lack of natural light
- Air quality (no mechanical ventilation)
- Classroom layout antiquated, too small (assume teaching lecture style)
- Electrical power deficiencies
- Lack of accessibility for strollers, others
- Lack of food service

### Existing Deficiencies (March 13)

- Aged finishes: Linoleum peeling up
- Cafe too small
- First floor hallway dark
- Artificial light throughout is poor quality
- Poor service access: Narrow driveway, hard to access auditorium, currently unload equipment at street
- Classrooms facing street are hot
- More bathrooms needed: Kinder/students and staff



VISION FOR GLENVIEW

- VISION FOR GLENVIEW

VISION FOR GLENVIEW

- VISION FOR GLENVIEW

## Glenview

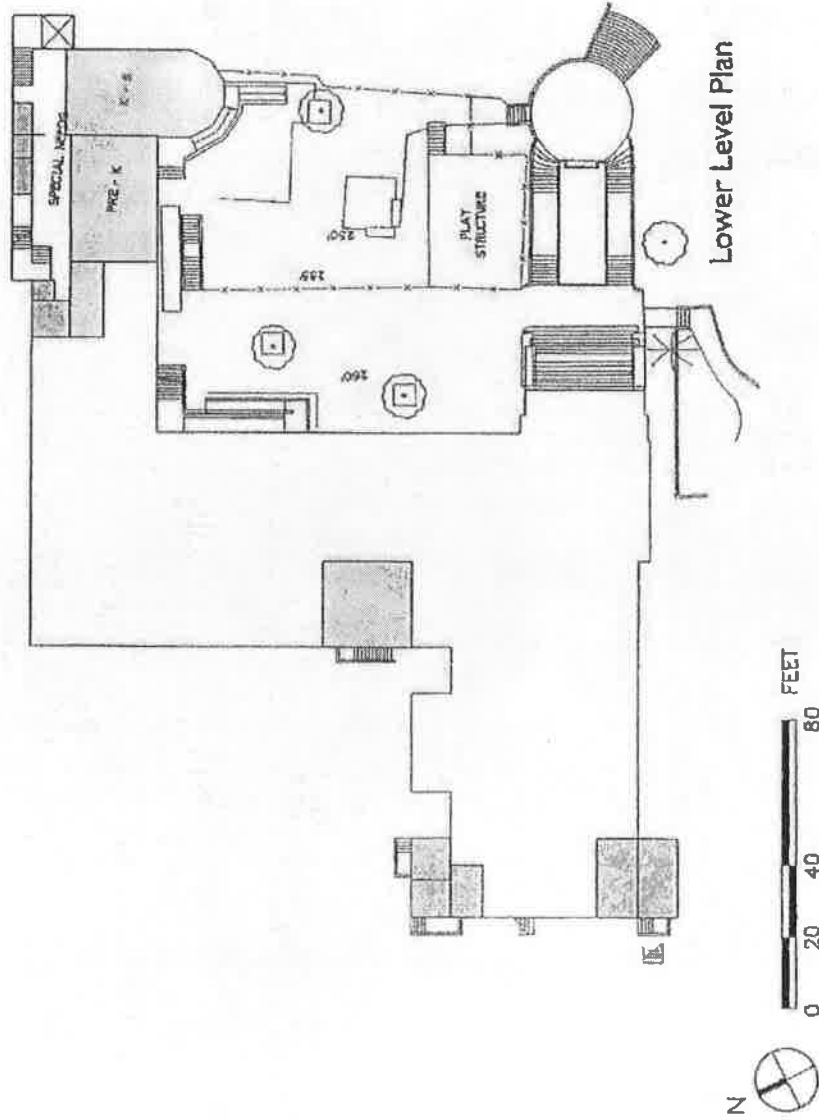
## Glenview



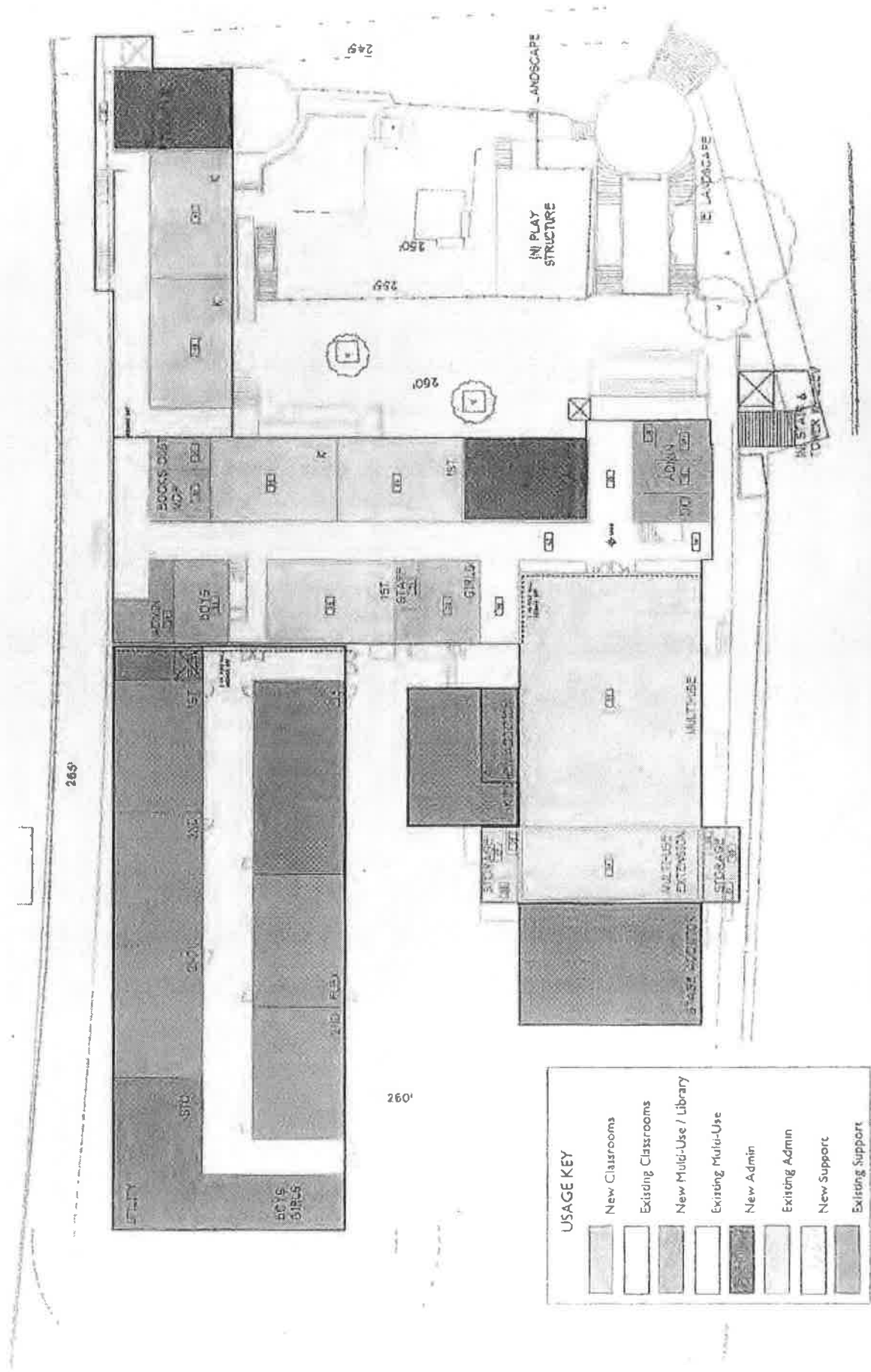
# VISIONING PROCESS



USAGE KEY	
	New Classrooms
	Existing Classrooms
	New Multi-Use / Library
	Existing Multi-Use
	New Admin
	Existing Admin
	New Support
	Existing Support











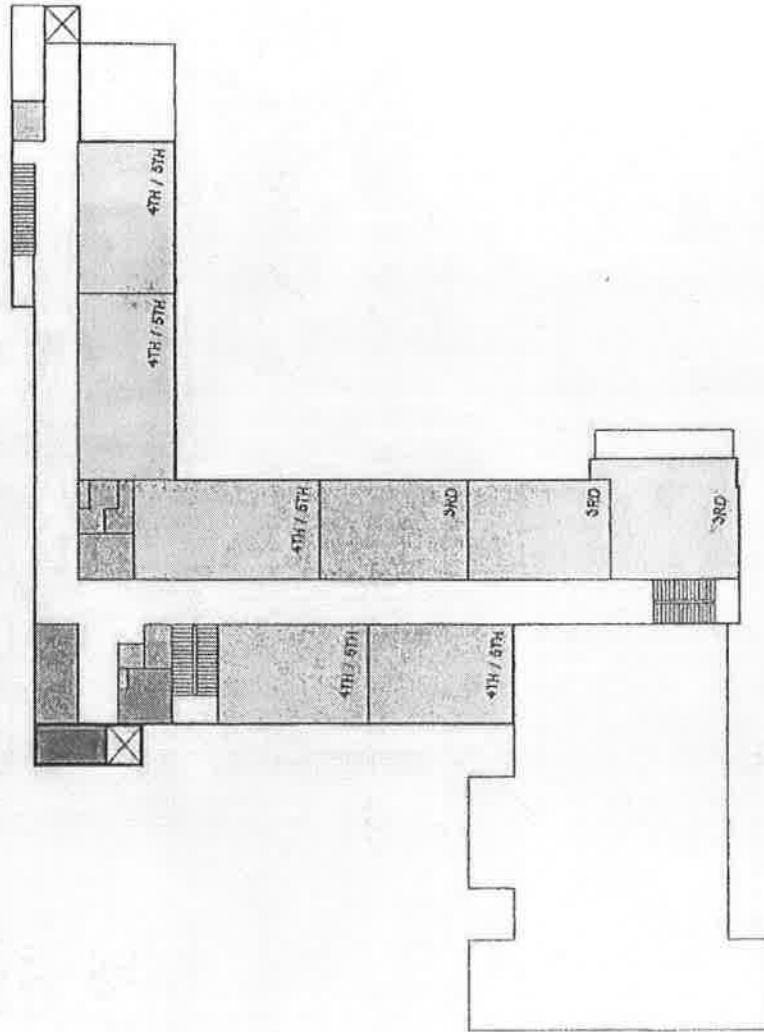
Lower Level Plan



# MODERNIZATION / ADDITION OPTION

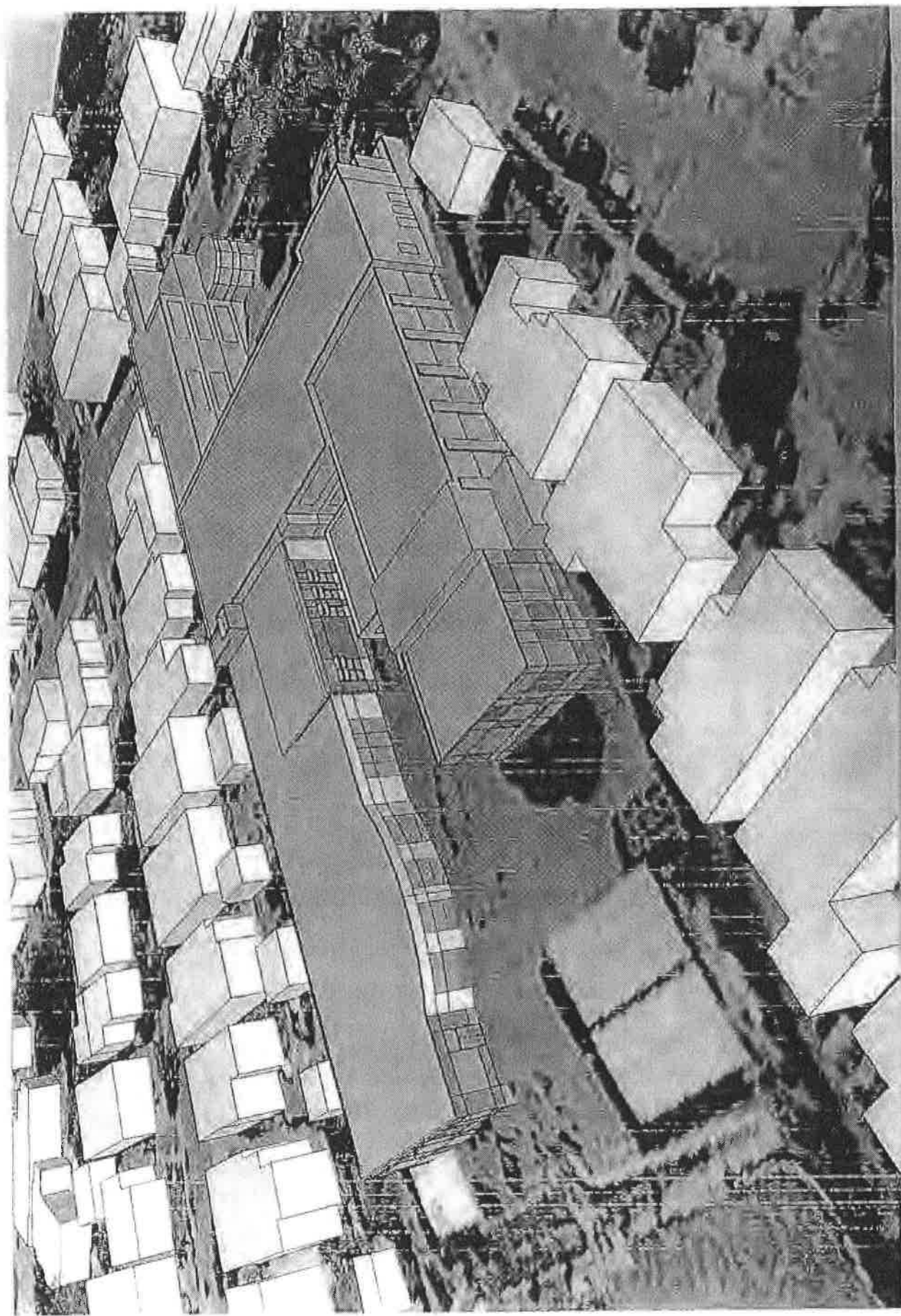
MM17

USAGE KEY	
	New Classrooms
	Existing Classrooms
	New Multi-Use / Library
	Existing Multi-Use
	New Admin
	Existing Admin
	New Support
	Existing Support



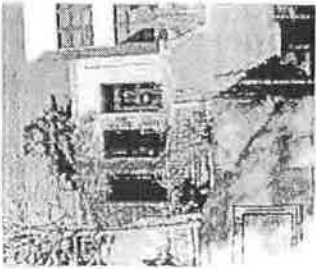
Second Floor Plan





MODERNIZATION / ADDITION OPTION

HAIT



# MODERNIZATION/ADDITION OPTION

Total Cost: \$20.4 Million

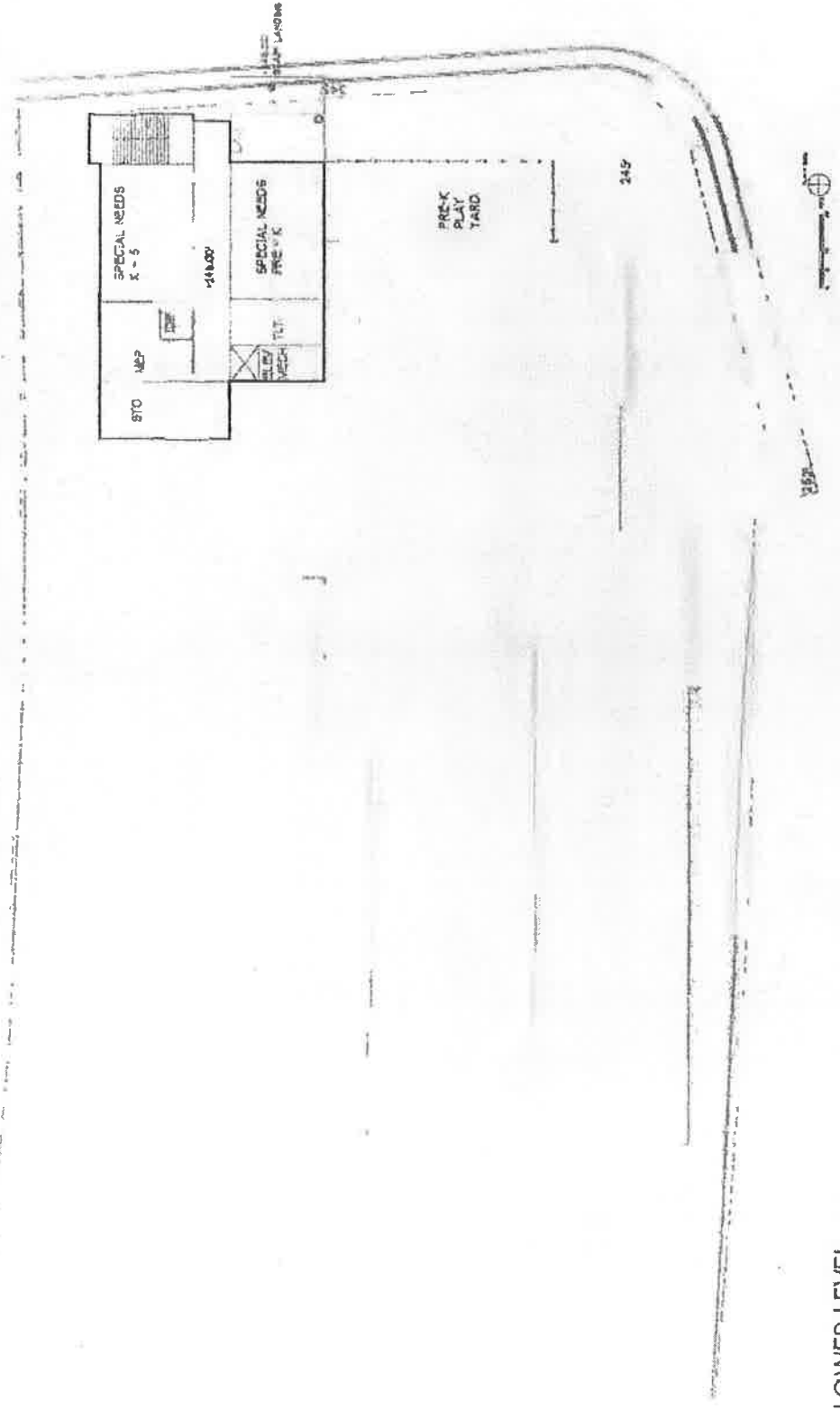
Addition Cost: \$8.4 Million

Seismic/Access Cost: \$10.7 Million

## Deficiencies:

- Undersized Classroom
- Poor site circulation and continuity within the building
- Campus Zoning Issues:
  - Split Administration
  - Location of Kitchen and Delivery Route
  - Multi-Use configuration
  - Library at Interior Court
  - Kindergarten Yard at Front of Campus





LOWER LEVEL

RECOMMENDATION: ALL NEW CONSTRUCTION

HKIT



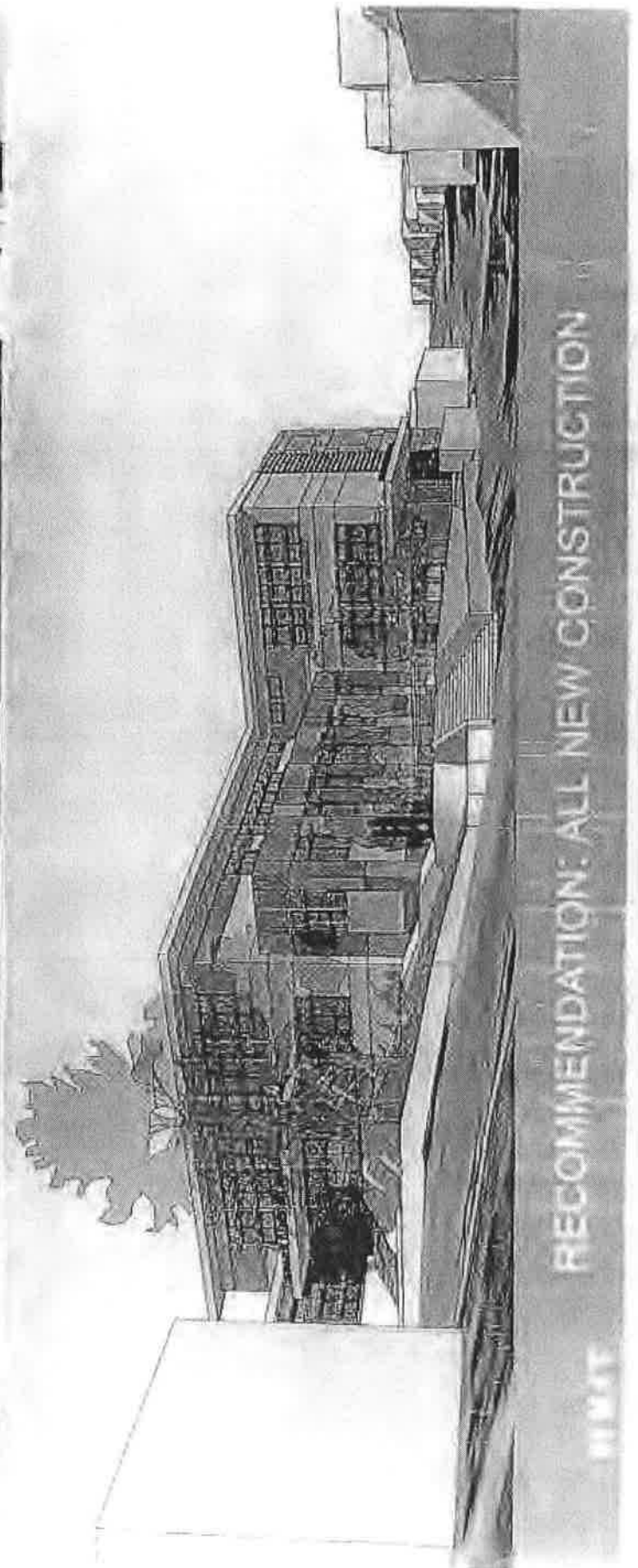
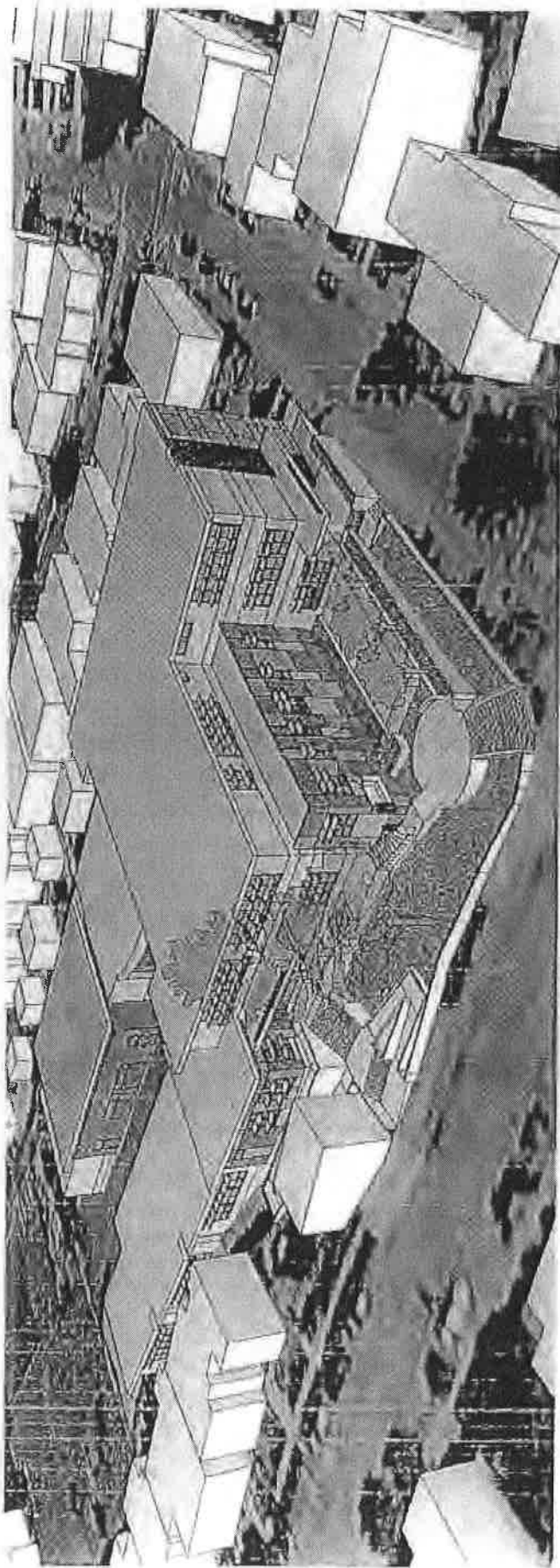
# ALL NEW CONSTRUCTION OPTION

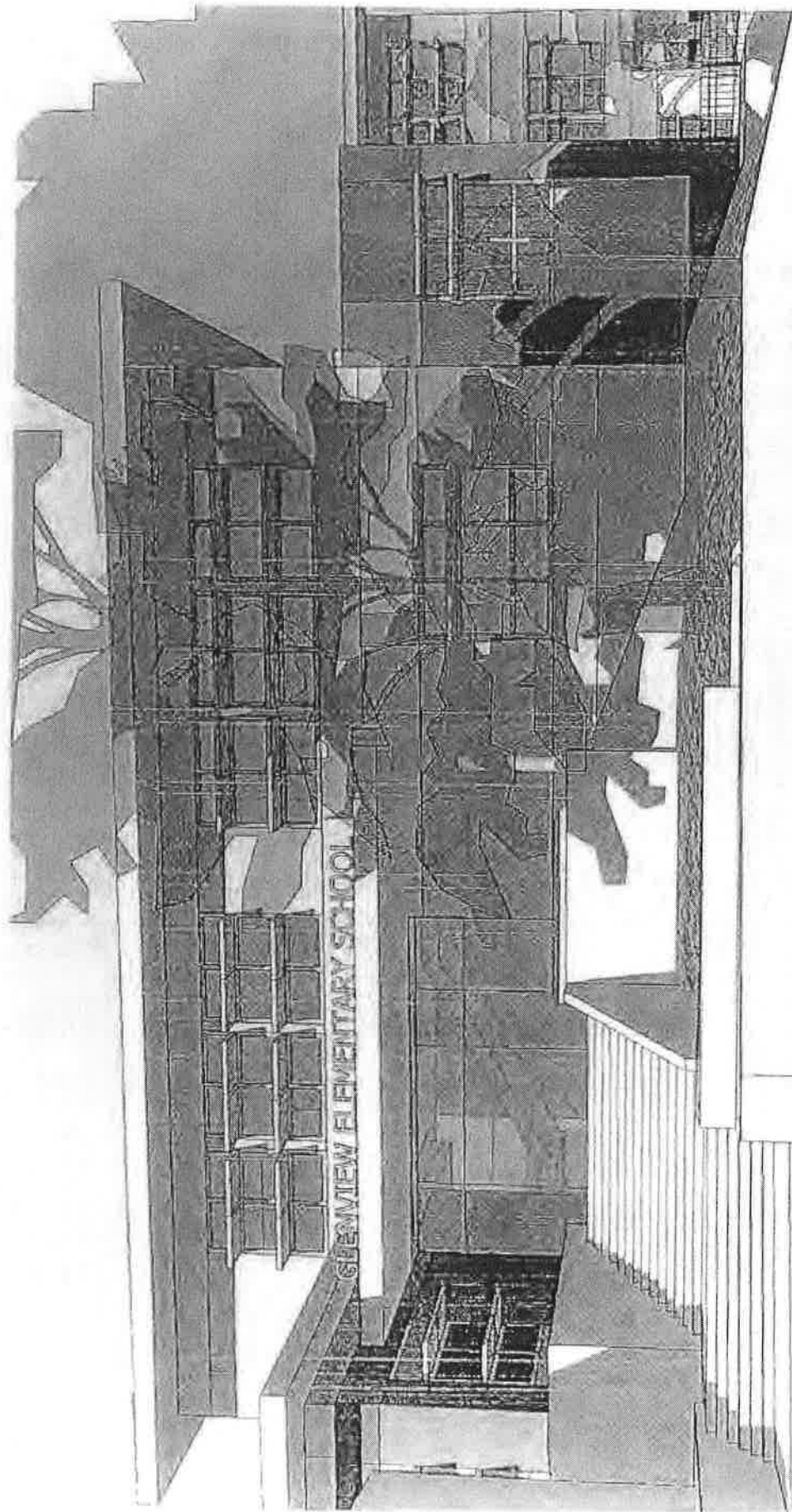
Cost = \$26 Million

(\$5.5M more than Modernization Option)

## Advantages:

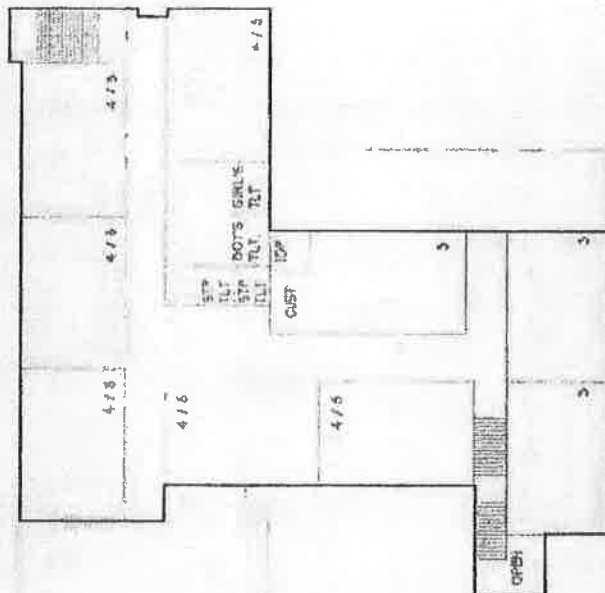
- Classroom Size
- Campus Zoning:
  - Contiguous Administration
  - Library Location at Main Entrance
  - Kindergarten at Courtyard
  - Location of Multi-Use/Kitchen and Delivery Route
- Full ADA Access and Equal Facilitation
- Net-Zero
- Remains the Icon for Neighborhood





RECOMMENDATION: ALL NEW CONSTRUCTION

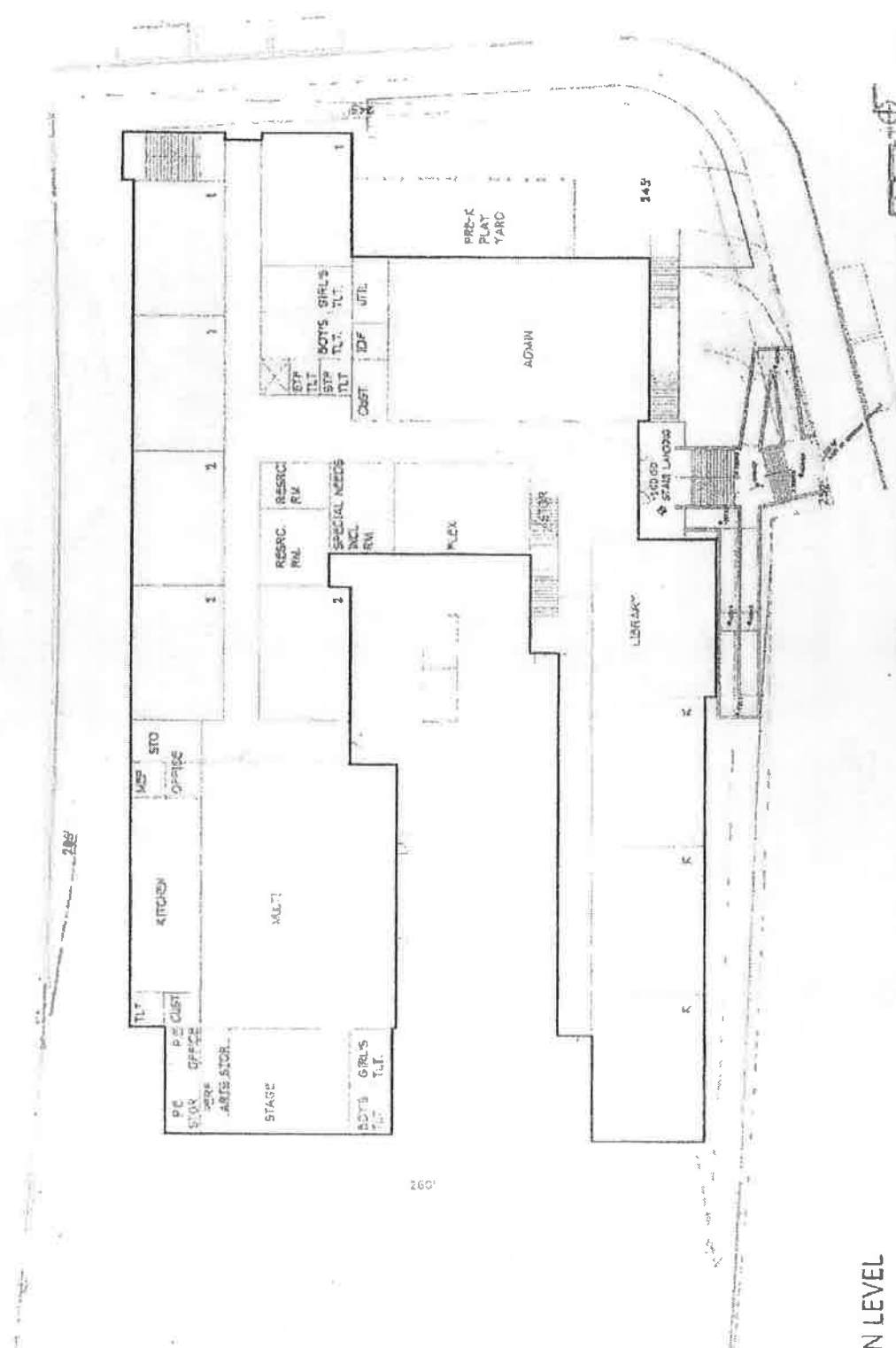
HKIT



UPPER LEVEL

RECOMMENDATION: ALL NEW CONSTRUCTION

AKT



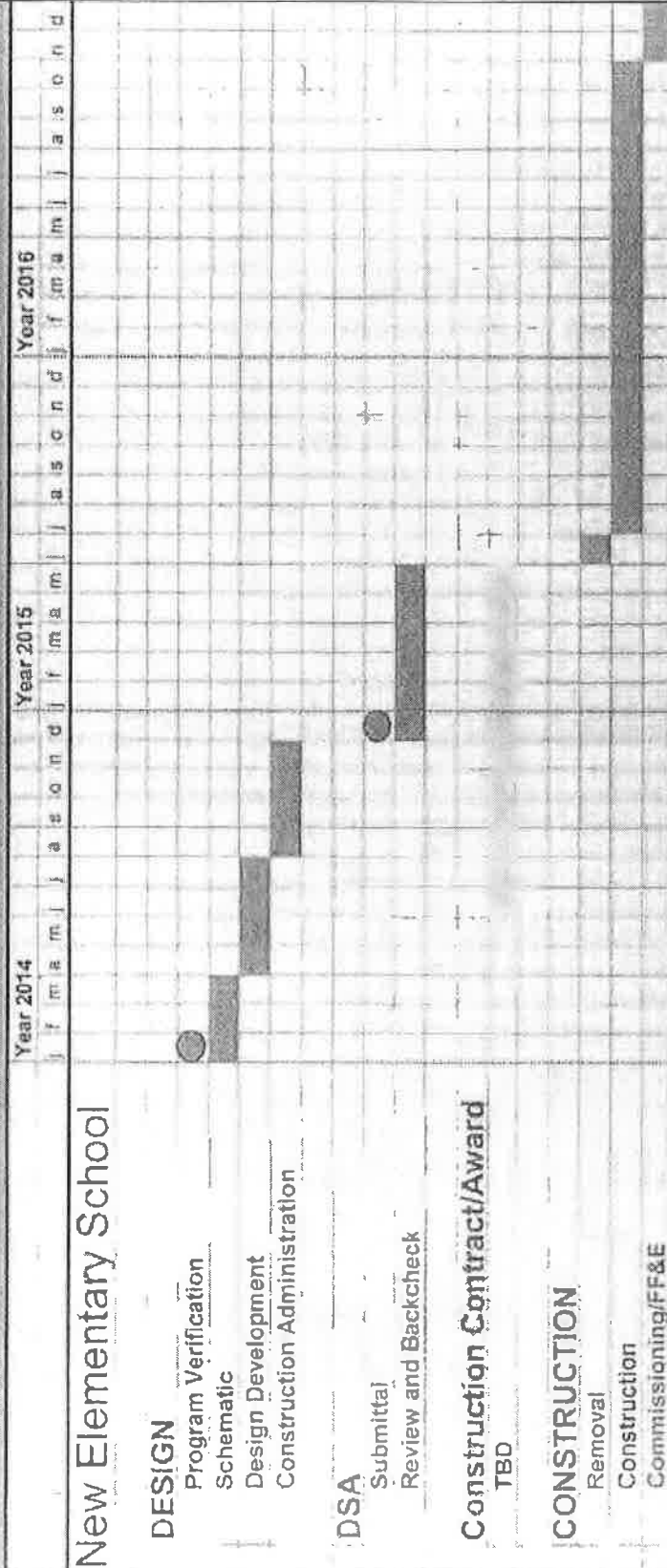
## MAIN LEVEL

## RECOMMENDATION: ALL NEW CONSTRUCTION

100



# OUSD - Glenview Elementary School



PROJECT SCHEDULE

CHKIT

## AGREEMENT FOR ARCHITECTURAL SERVICES ROUTING FORM

Project Information			
Project Name	Glenview Renovation	Site	119
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	HKIT Architects	Agency's Contact	Dara A. Youngdale
OUSD Vendor ID #	V022233	Title	Architect of Record
Street Address	538 Ninth Street, Suite 240	City	Oakland State CA Zip 94607
Telephone	510-625-9800	Policy Expires	8-28-2014
Contractor History	Previously been an OUSD contractor? x Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Worked as an OUSD employee? <input type="checkbox"/> Yes x No <input checked="" type="checkbox"/>		
OUSD Project #	13134		

Term			
Date Work Will Begin	2-26-2014	Date Work Will End By (not more than 5 years from start date)	2-26-2019

Compensation			
Total Contract Amount	\$	Total Contract Not To Exceed	\$2,724,900.00
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 before completing requisition.				
Resource #	Funding Source	Org Key	Object Code	Amount
9350	Measure J Fund 21	1199905890	6215	\$2,724,900.00

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	Charles Love	Phone	510-535-8038	Fax 510-535-7082
	Director, Facilities Planning and Management				
	Signature			Date Approved	2/4/14
2.	General Counsel, Department of Facilities Planning and Management				
	Signature			Date Approved	2/5/14
	Associate Superintendent, Facilities Planning and Management				
3.	Signature			Date Approved	
	Deputy Superintendent, Business Operations				
4.					
	President, Board of Education				
5.	Signature			Date Approved	





## DIVISION OF FACILITIES PLANNING AND MANAGEMENT ROUTING FORM

Project Information			
Project Name	Glenview New Construction	Site	119
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	HKIT Architects	Agency's Contact	Dara Youngdale				
OUSD Vendor ID #	V022233	Title	Architect of Record				
Street Address	538 Ninth Street, Suite 240	City	Oakland	State	CA	Zip	94607
Telephone	510-625-9800	Policy Expires	9-1-2017				
Contractor History	Previously been an OUSD contractor? X Yes <input type="checkbox"/> No		Worked as an OUSD employee? <input type="checkbox"/> Yes x No				
OUSD Project #	13134						

Term			
Date Work Will Begin	1/25/2017	Date Work Will End By (not more than 5 years from start date)	12/29/2017

Compensation			
Total Contract Amount	\$	Total Contract Not To Exceed	\$2,809,900.00
Pay Rate Per Hour (If Hourly)	\$	If Amendment, Changed Amount	\$ 85,000.00
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 before completing requisition.				
Resource #	Funding Source	Org Key	Object Code	Amount
9450	Fund 21, Measure J	1199905822	6215	\$85,000.00 <span style="float: right;">LAL</span>

Approval and Routing (in order of approval steps)					
Services cannot be provided before the contract is fully approved and a Purchase Order is issued. Signing this document affirms that to your knowledge services were not provided before a PO was issued.					
	Division Head	Phone	510-535-7038	Fax	510-535-7082
1.	Director, Facilities Planning and Management				
	Signature	Date Approved		4/10/17	
2.	General Counsel, Department of Facilities Planning and Management				
	Signature	Date Approved		4/11/17	
3.	Deputy Chief, Facilities Planning and Management				
	Signature	Date Approved			
4.	Senior Business Officer, Board of Education				
	Signature	Date Approved			
5.	President, Board of Education				
	Signature	Date Approved			