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**OAKLAND UNIFIED
SCHOOL DISTRICT**
Community Schools, Thriving Students

Memo

To Board of Education

From Kyla Johnson-Trammell, Superintendent
Preston Thomas, Chief Systems & Services Officer

Board Meeting Date June 25, 2025

Subject Architect Services Master Agreement for Various School Sites – Gelfand Partners Architects - Projects with Construction Budget Under Ten Million Dollars – Division of Facilities Planning and Management

Action Requested Approval by the Board of Education of an Architect Services Master Agreement for Various School Sites by and between the District and Gelfand Partners Architects, Oakland, CA, for the latter to provide Architectural Services for the District's projects with a construction budget under ten million dollars (\$10,000,000.00) at various school sites, in the not-to-exceed amount of \$0 at this time, with work scheduled to commence on June 26, 2025, and scheduled to end on June 30, 2028. Future projects assigned to Gelfand Partners Architects under the agreement will be executed with amendments, each specific to a project scope.

Discussion Consultant was selected (a) based on demonstrated competence and professional qualifications (Government Code §4526), and (b) using a fair, competitive RFP selection process (Government Code §§4529.10 et seq.)

LBP (Local Business Participation Percentage) 50.00%

Recommendation Approval by the Board of Education of an Architect Services Master Agreement for Various School Sites by and between the District and Gelfand Partners Architects, Oakland, CA, for the latter to provide Architectural Services for the District's projects with a construction budget under ten million dollars (\$10,000,000.00) at various school sites, in the not-to-exceed amount of \$0 at this time, with work scheduled to commence on June 26, 2025, and scheduled to end on June 30, 2028. Future projects assigned to Gelfand Partners Architects under the agreement will be executed with amendments, each specific to a project scope.

Fiscal Impact Fund 21 – Building Fund Measure Y

Attachments

- Justification Form
- Agreement, including Exhibits
- Certificate of Insurance
- Routing Form



CONTRACT JUSTIFICATION FORM

This Form Shall Be Submitted to the Board Office With Every
Agenda Contract.

Legislative File ID No. 25-1446

Department: Division of Facilities Planning and Management

Vendor Name: Gelfand Partners Architects

Project No.: 25040

**Project Name: Projects with Construction Budget Under Ten Million Dollars
Various School Sites**

Contract Term: Intended Start: 06-26-2025

Intended End: 06-30-2028

Total Cost Over Contract Term: \$0.00

Approved by: Preston Thomas

Is Vendor a local Oakland Business or has it met the requirements of the

Local Business Policy? ☒ Yes (No if Unchecked)

How was this contractor or vendor selected?

Consultant was selected (a) based on demonstrated competence and professional qualifications (Government Code §4526), and (b) using a fair, competitive RFP selection process (Government Code §§4529.10 et seq.)

Summarize the services or supplies this contractor or vendor will be providing.

Gelfand Partners Architects will provide architectural services for various upcoming projects with construction budgets under \$10 million. The District will issue Requests for Proposals (RFPs) to firms with approved master agreements through an informal procurement process. Firms chosen for specific projects will execute amendments to their master agreements.

Was this contract competitively bid?

☐

Check box for "Yes" (If "No," leave box unchecked)

If "No," please answer the following questions:

1) How did you determine the price is competitive?

The firm's proposed hourly billing rates for staff positions, as submitted in response to the RFQ, were found to be in line with industry standards. Based on the District's best value criteria, considering both qualifications and fees, the rates were deemed reasonable.

2) Please check the competitive bidding exception relied upon:

Construction Contract:

- ☐ Price is at or under UPCCAA threshold of \$60,000 (as of 1/1/19)
- ☐ CMAS contract [may only include “incidental work or service”] (Public Contract Code §§10101(a) and 10298(a)) – *contact legal counsel to discuss if applicable*
- ☐ Emergency contract (Public Contract Code §§22035 and 22050) – *contact legal counsel to discuss if applicable*
- ☐ No advantage to bidding (including sole source) – *contact legal counsel to discuss if applicable*
- ☐ Completion contract – *contact legal counsel to discuss if applicable*
- ☐ Lease-leaseback contract RFP process – *contact legal counsel to discuss if applicable*
- ☐ Design-build contract RFQ/RFP process – *contact legal counsel to discuss if applicable*
- ☐ Energy service contract – *contact legal counsel to discuss if applicable*
- ☐ Other: _____ – *contact legal counsel to discuss if applicable*

Consultant Contract:

- ☒ Architect, engineer, construction project manager, land surveyor, or environmental services – selected (a) based on demonstrated competence and professional qualifications (Government Code §4526), **and** (b) using a fair, competitive RFP selection process (Government Code §§4529.10 et seq.)
- ☐ Architect or engineer *when state funds being used* – selected (a) based on demonstrated competence and professional qualifications (Government Code §4526), (b) using a fair, competitive RFP selection process (Government Code §§4529.10 et seq.), **and** (c) using a competitive process consistent with Government Code §§4526-4528 (Education Code §17070.50)
- ☐ Other professional or specially trained services or advice – no bidding or RFP required (Public Contract Code §20111(d) and Government Code §53060) – *contact legal counsel to discuss if applicable*
- ☐ For services other than above, the cost of services is \$109,300 or less (as of 1/1/23)
- ☐ No advantage to bidding (including sole source) – *contact legal counsel to discuss if applicable*

Purchasing Contract:

- ☐ Price is at or under bid threshold of \$109,300 (as of 1/1/23)
- ☐ Certain instructional materials (Public Contract Code §20118.3)
- ☐ Data processing systems and supporting software – choose one of three lowest bidders (Public Contract Code §20118.1)

- ☐ Electronic equipment – competitive negotiation (Public Contract Code §20118.2) – *contact legal counsel to discuss if applicable*
- ☐ CMAS contract [may only include “incidental work or service”] (Public Contract Code §§10101(a) and 10298(a)) – *contact legal counsel to discuss if applicable*
- ☐ Piggyback contract for purchase of personal property (Public Contract Code §20118) – *contact legal counsel to discuss if applicable*
- ☐ Supplies for emergency construction contract (Public Contract Code §§22035 and 22050) – *contact legal counsel to discuss if applicable*
- ☐ No advantage to bidding (including sole source) – *contact legal counsel to discuss if applicable*
- ☐ Other: _____

Maintenance Contract:

- ☐ Price is at or under bid threshold of \$109,300 (as of 1/1/23)
- ☐ No advantage to bidding (including sole source) – *contact legal counsel to discuss*
- ☐ Other: _____

3) Explain in detail the facts that support the applicability of the exception marked above:

Consultant was selected (a) based on demonstrated competence and professional qualifications (Government Code §4526), and (b) using a fair, competitive RFP selection process (Government Code §§4529.10 et seq.)

ARCHITECT SERVICES MASTER AGREEMENT FOR VARIOUS SCHOOL PROJECTS

This Architect Services Agreement (“**Agreement**”) is entered into this **June 26, 2025**, (“**Effective Date**”) by and between OAKLAND UNIFIED SCHOOL DISTRICT (“**District**”) and **GELFAND PARTNERS ARCHITECTS** (“**Architect**”). District and/or Architect may be referred to individually herein as a “Party,” or collectively as the “Parties.”

RECITALS

- A. The District is a California school district duly organized and validly existing under the laws of the state of California.
- B. The Architect is a professional services firm duly organized under the laws of the state of California. The Architect represents it has the background, knowledge, licensing, experience and skill necessary to provide the services set forth in this Agreement.
- C. The District and Architect desire to enter into an agreement for the Architect to provide the District with professional services on selected projects (each hereinafter referred to as a “Project”) as requested and authorized by specific authorization prepared and submitted by the Architect for approval by the District, each hereinafter referred to as the “Project Authorization.”
- D. It is the intention of the Parties that the Architect provide the District, pursuant to each executed Project Authorization, architectural and engineering services under the management and oversight of the District’s staff for the Project.
- E. As required by applicable law, personnel of the Architect and its Subconsultants shall be duly licensed as architects and/or registered as engineers under the laws of the state of California and are otherwise qualified and capable of providing and performing the Basic Services and its other obligations under this Agreement in accordance with the terms hereof.

AGREEMENT

NOW, THEREFORE, it is mutually agreed by and between the undersigned Parties as follows:

ARTICLE I GENERAL PROVISIONS

1.1. SCOPE OF SERVICES

- (a) The District shall authorize the Architect to proceed on each Project with a written Project Authorization which:

- (i) Provides a description of the type, size and scope of the Project
- (ii) States the Project Budget;
- (iii) Specifies the Basic Services and/or Additional Services required of the Architect;
- (iv) Identifies the services and responsibilities of the District or others for the Project;
- (v) States method and/or amount of compensation to be paid to the Architect for its services;
- (vi) Identifies the key Personnel to be used for the project;
- (vii) Identifies the specific Subconsultants to be used for the project;
- (viii) States the Preliminary Project Schedule;
- (ix) Indicates additional or special provisions related to the Project and/or modifications to this Agreement that may pertain to the Project.

(b) A Project Authorization, when signed by the District and the Architect, shall become an effective and integral part of this Agreement with each and all of the provisions of one such document applying to the other as to the applicable Project, except as specifically modified or set forth to the contrary in the Project Authorization.

(c) The District and Architect have endeavored to delineate the scope of the Basic Services to be provided by Architect in Article 2, below. Such descriptions are not intended to be comprehensive, it being understood that Architect shall be required, without adjustment or addition to the fixed rates or maximum compensation agreed to herein, to provide any services, whether or not listed in Article 2 that are within the scope of its field of professional practice and that are reasonably inferable as being necessary, or that would be customarily furnished by other providers of professional services of the type and nature provided for in this Agreement, to accomplish the Basic Services set forth in Article 2. Should the District proceed to perform the Project in multiple phases, such Scope of Services, as further described herein, shall be applicable to all phases of the Project. To the extent there are any ambiguities and/or conflicting terms and provisions as between the Architect's Proposal and this Agreement, this Agreement shall control and govern.

1.2. PERFORMANCE STANDARDS

All services performed under this Agreement shall be performed by the Architect and its Subconsultants in a manner consistent with the standard of care under California law applicable to those who provide similar services for projects of the type, scope and complexity of the Project

subject to this Agreement in the locality of the Project; the Applicable Laws; the terms of this Agreement; and using their professional skill and judgment (hereinafter “Standard of Care”). Architect shall strictly comply with all the terms of this Agreement.

1.3. AUTHORITY OF THE ARCHITECT

Architect's authority to act on behalf of District is limited to its scope of authority set forth in this Agreement. Notwithstanding anything else stated in this Agreement or any Contract Documents, Architect does not have the express or implied authority to obligate District to any expenditure of money or extension of contractual time periods, including, without limitation, any adjustment to the price or time of performance of any contract between District and its Contractors, Separate Contractors, Specialty Consultants, Program Manager or other third persons or parties. The Architect shall be liable to the District and third parties for the consequences of the Architect's actions or conduct exceeding the limited scope of the Architect's authority to act on behalf of the District.

1.4. KEY PERSONNEL

1.4.1. **Of Essence.** The services to be provided by Architect under this Agreement shall be performed or directed by the Key Personnel, as identified in the Project Authorization.

1.4.2. **Commitment, Cooperation.** Recognizing the necessity of a close working relationship with the District, the Architect's principals and employees shall furnish the skill, efforts and judgment of its organization in the performance of their duties and responsibilities under this Agreement, subject at all times to District's discretion, and provide their knowledge, ideas, experience and abilities relating to the efficient design and construction of the Project and to cooperate fully with all members of the Project Team.

1.4.3. Additions, Removals, Replacements.

(i) **Additions.** It is contemplated that from time to time individuals will be added to the list of Key Personnel as necessary and appropriate to the stages of planning, programming, designing and constructing of the Project. Architect shall anticipate the need for such additions by submitting to the District no later than seven (7) Days prior to the need therefore, a proposed amendment to the list of Key Personnel setting forth the Architect's proposed additions and the reasons for such additions. The District shall promptly review the proposed additions and either approve or disapprove thereof in writing, along with a statement of the reasons for any disapproval. Architect shall not employ any individual to perform the functions as Key Personnel without the advance approval of the District, which approval may be granted or withheld in their sole discretion.

(ii) **Removals.** Architect shall not, for so long as any person serving as Key Personnel is employed by Architect, remove, substitute or reduce the level of effort of such

person without the District's prior written approval, which may be granted or withheld in its sole discretion. If District is dissatisfied with the services rendered by any Key Personnel, Architect shall promptly recommend a substitute person.

(iii) **Replacements.** If any Key Personnel ceases employment with Architect or is requested to be removed pursuant to Paragraph 1.4.3.2 above, then Architect shall promptly notify District of a proposed substitute person of at least equal qualifications to perform the same functions to be approved by District, which approval may be granted or withheld in its sole discretion. Architect shall bear, at its own expense and without reimbursement by District, all costs associated with replacing, for any reason, any Key Personnel.

1.4.4. Engagement by District. In the event Architect ceases its business operations altogether or this Agreement is terminated by District for cause, District shall have the right, but not the obligation, without liability or obligation to Architect or any other person or entity, to directly engage the services of any of the Key Personnel in accordance with the provisions of this Paragraph 1.4.4. In the event that Architect learns that any of the Key Personnel will be leaving the employ of Architect, Architect shall promptly notify District. District shall then have the rights described in this Paragraph 1.4.4 to engage directly the services of such persons.

1.4.5. Project Representative. The Architect's designated project representative has the authority to act on behalf of the Architect in respect to all matters that are the subject of this Agreement, including, without limitation, the power and authority to enter into agreements or modifications to agreements that contractually bind Architect. Authority to enter into agreements or modifications to agreements that contractually bind and/or change the terms and conditions of the contract with the District shall remain with the District's Facilities Director or his/her designee.

1.4.6. Architect's Employees. All persons employed by Architect shall be the employees of Architect and not of District. Architect shall be solely responsible for any workers' compensation obligations, withholding taxes, unemployment insurance and any other employer obligations with respect to all employees working for Architect.

1.5. SUBCONSULTANTS

For Subconsultants other than those designated and included in the Agreement, Architect may, with prior approval by District, enter into written contracts with Subconsultants to perform portions of the services provided for in this Agreement. Architect's request for hiring of a Sub consultant shall be submitted in a writing that describes the scope of services to be contracted, the name of the proposed Sub consultant and the estimated total cost and/or hourly rates for the Sub consultant's services. The District shall have reasonable discretion in approving any Sub consultant and such approval must be in writing to be effective. The District shall use its best efforts to approve or disapprove of proposed Subconsultants within seven (7) Days of Architect's request. Architect shall remain responsible to the District for the quality and performance of all

Subconsultants' services. Architect may, upon advance written notice to the District, terminate and replace the services of any Sub consultant, subject in all cases to the prior written approval of the District, not to be unreasonably withheld. Every subcontract or agreement of any kind entered into between Architect and Sub consultant (or between any Sub consultant and other independent contractor Subconsultants) shall contain appropriate language whereby Sub consultant, without creating any contractual obligation on the part of the District to the Sub consultant or anyone working under contract to Sub consultant, accepts and agrees to be bound by all of the obligations of this Agreement, including, without limitation, those obligations pertaining to indemnification, insurance, accounting records, audit and ownership of documents, and agrees to include in its contracts with its Subconsultants a contingent assignment of those contracts to the District or its designee, effective only upon written acceptance by the District or its designee.

1.6. OWNERSHIP OF DESIGN DOCUMENTS

1.6.1. Property of the District. All materials, including CAD and BIM files, images, presentations, reports, media, documents, specifications, records, calculations and digital and analog files and materials employed in the creation of same (collectively, "Design Documents") prepared by the Architect and its Sub- consultants, the designs depicted in them, and any presentation materials, shall become, upon their creation and services paid, the property of the District whether the Project for which they are made is executed or not. Without limitation to the foregoing, the District shall hold, and Architect shall be deemed to have been irrevocably assigned to the District in perpetuity with no reserved or retained rights in any other persons or entities, all copyrights or other intellectual property rights relating to the Design Documents. The District hereby grants to Architect and its Subconsultants a license, revocable at will of the District, to use and copy such documents during the term of this Agreement for the sole purpose of performing the services required under this Agreement. With the exception of standard and generic details in the Drawings, the Design Documents shall not be used as a whole, or in substantial part, by the Architect on other projects without prior agreement.

1.6.2. Use of Design Documents. The District may use the Design Documents, without the Architect's consent, in connection with the Project, including, without limitation, future additions, alterations, connections, repairs, information, reference, use or occupancy of a Project. The District may reuse the Design Documents for other Projects at no additional cost, provided however, that the District shall hold harmless and indemnify the Architect against any losses arising from the District's use of the Design Documents for any other purpose, including use of the Design Documents on other projects, and District shall defend Architect from and against any claims arising from any unauthorized use.

1.6.3. Bidding. The Architect, upon request, shall provide copies of the Design Documents in the number required by the District for bidding and construction purposes in connection with the Project as part of its Basic Services. The District reserves the right to select the type of document reproduction and to establish where the reproduction will be accomplished.

1.6.4. **Termination.** In the event of termination of this Agreement by either Party for any reason, the District reserves the right to receive, and the Architect shall promptly provide to the District upon payment of all undisputed monies due, all Drawings, Specifications, models, and other Design Documents prepared under this Agreement prior to the date of termination by the Architect and its Subconsultants for this Project. The foregoing shall include without limitation, all drafts and all electronic files of the Design Documents. Unless otherwise agreed to by the District, the Architect shall deliver all such Design Documents to the District within fifteen (15) Days of the date of the exercise of the termination rights under this Agreement. Architect shall be permitted, at its sole cost and expense to retain copies, including reproducible copies, of the Design Documents for information and reference purposes only. Any dispute regarding the amount of any payment to be made by the District under this Agreement shall be resolved per Article 6.3 of the Agreement.

1.7. COMPLIANCE WITH APPLICABLE LAWS

Architect shall, at all times in its performance of its obligations under this Agreement, be responsible to comply with the Standard of Care in the application of Applicable Laws, including, without limitation, those rules or regulations enacted or issued by the District.

1.8. TIME OF ESSENCE

All time limits set forth in this Agreement pertaining to the performance of any obligation or act are of the essence to this Agreement.

ARTICLE II BASIC SERVICES

The Architect's professional services relative to a Project, as specifically identified and authorized on a Project Authorization, shall be performed within certain Phases of Work. The Phases, generally described below, outline the possible services contained within the Phases. These general Phase descriptions are intended to be solely for the convenience of reference and not as a determinative of the services to be actually performed or authorized for a specific project.

The Basic Services shall include but may not be limited to Basic Planning Services, Schematic Design, Design Development, Construction Documents, Construction Administration and the Project Closeout Phases. Such services may include but may not be limited to the following disciplines: Civil, Architectural, Structural, Mechanical including HVAC, Plumbing, Fire Protection, Electrical, Acoustical, Audio Visual and Hardware. The required deliverables may include but may not be limited to Drawings, Specifications, Basis of Design Report and Cost Estimating Report. Architect shall perform the following Basic Services as set forth below for a Project. Should the District proceed to perform the Project in multiple phases, Architect may be required to provide Basic Services, as specified in this Article 2, for each of the identified phases, as is necessary to complete the Project.

2.1. GENERAL

2.1.1. Project Construction Budgets. It is the obligation of the Architect to design the Project in a manner that will enable each Project to be constructed for a Construction Cost that does not exceed the Project Construction Budget for the Project. Should the District proceed to perform a Project in multiple phases, Architect may be required to provide a Project Construction Budget for each phase of the Project. No adjustments shall be made to a Project Construction Budget except for: (i) significant fluctuations in general levels of prices in the construction industry as reflected by the ENR Index after the Project Budget is prepared; or (ii) material changes requested in writing by the District to a Project's Schedule or scope; or (iii) other adjustments increasing the Project Construction Budget that the District determines, in its sole discretion, are appropriate or necessary. Architect shall notify the District promptly upon becoming aware of any circumstance that Architect knows or should have known in the exercise of the Standard of Care required by this Agreement, may require an adjustment in a Project Construction Budget. Failure by Architect to provide such timely written notice may result in its waiving the right to an adjustment of a Project Construction Budget on account of such circumstance. Wherever it is stated in this Agreement that the District has the right to direct that Architect, at its own expense, furnish design services to reduce the scope of the Project while maintaining the District Design Standards, to meet the requirements of the agreed-upon Project Construction Budget, such right shall not be interpreted as creating an obligation on the part of the District to extend such opportunity for redesign to Architect nor as a waiver of, or limitation on, the District's right, in lieu of requesting the performance of such redesign services, to exercise its other rights provided for at law or under this Agreement, including, without limitation, the right to terminate this Agreement or a Project Assignment for cause or for convenience. The District's Project Construction Budget shall be set forth in each project assignment.

In preparing estimates of the Cost of Work, the Architect shall be permitted to include contingencies for design, bidding and price escalation; to determine what materials, equipment, component systems and types of construction are to be included in the Contract Documents; to make reasonable adjustments in the program and scope of the Project; and to include in the Contract Documents alternate bids as may be necessary to adjust the estimated Cost of the Work to meet the District's Project Construction Budget. The Architect's estimate of the Cost of the Work shall be based on current area, volume or similar conceptual estimating techniques.

2.1.2. Review of Work Product. Architect shall use its skills and experience to review the work product and information furnished by the District and Design and Construction Project Team members and advise the District of known errors or omissions and to report its findings to the District, with an appropriate recommendation; provided, however, that failure by Architect to give such notice shall not relieve the District and Design and Construction Project Team members of their liability or responsibility, therefore. Notwithstanding the foregoing, the

Architect shall have no liability to the District or any other party arising out of the Architect's failure to identify errors or omission in the information furnished to the Architect.

2.1.3. Selection of Specialty Consultants. Architect shall advise the District on the appropriate time for retention of Specialty Consultants whose services are necessary for the Project, being certain to allow sufficient time in advance for prequalification and selection of Specialty Consultants in accordance with Applicable Laws and the guidelines, practices and procedures of the District, and Architect and, at points in time appropriate to the stage and status of the Project, and shall assist the District with the following: (i) preparation of prequalification criteria; (ii) preparation of requests for qualifications; (iii) conduct of pre-qualification award conferences and responses to questions by proposers; (iv) evaluation of proposers; (v) establishment of a list of pre-qualified professionals; and (vi) preparation of a definitive scope of services.

2.1.4. Project Schedules and General Deliverables. Architect shall, promptly after execution of this Agreement, prepare and continuously update a Project Schedule for this Project, and for the Project overall, which integrates the activities of the District, Architect, and other Project Team members, depicting the detailed activities necessary to complete the design and construct each applicable Project, and the Project overall. Each such Project Schedule shall, without limitation: (i) coordinate and integrate the planning, programming and design activities in appropriate detail to the District's satisfaction; (ii) show estimated commencement, duration, responsible parties and sequence for planning, programming, design and bidding, and displacement of operations activities; (iii) be prepared and presented in a critical path for (CPM) format or using Microsoft Project, showing the interdependencies of the activities and a clearly highlighted critical path; and (iv) deadlines and estimates of time for a review and receipt of all approvals, decisions and other information to be provided by the District. Architect shall, no less frequently than monthly, update and expand the level of detail as the Project progresses, indicating current status of scheduled activities, projections of potential completion of major tasks, if significant variance from planned activities occurs, Architect shall recommend recovery plans to the District and, upon obtaining the District's approval thereto, modify the Project Schedule to incorporate such recovery plans. Should the District proceed to perform the Project in multiple phases, Architect may be required to provide a Project Schedule for each phase of the Project, as further described in this Section 2.1.4. The Project Schedule shall include the following deadlines, which shall not be thereafter adjusted except as permitted by Article 3 of this Agreement with the understanding the District and other necessary parties shall maintain schedule and deadlines per agreement:

Architect shall include a general schedule of the Project progress with key milestones as part of the Project Authorization. The Project Schedule will be updated with increased detail at each phase of construction, critical milestones or when scope changes occur that impact the schedule. Each such Project Schedule shall, without limitation: (i) coordinate and integrate the planning, programming and design activities in appropriate detail to the District's satisfaction; (ii) show estimated commencement, duration, responsible parties and sequence for

planning, programming, design and bidding, and displacement of operations activities; (iii) be prepared and presented in a critical path (CPM) format or using software acceptable to the District showing the interdependencies of the activities and a clearly highlighted critical path; and (iv) deadlines and estimates of time for a review and receipt of all approvals, decisions and other information to be provided by District.

2.1.5. **Communications.** The Architect shall comply with all written procedures issued by the District for conduct of communications among the Design and Construction Project Team members to deal with administrative matters relating to the planning, programming, design and construction of the Project.

2.1.6. **Meetings.** Architect shall attend regularly scheduled meetings with the District, and/or other Project Team members and shall respond promptly with respect to matters assigned to Architect for action or resolution. Architect to produce and distribute meeting minutes of each meeting and shall promptly review and provide any requests for corrections to meeting minutes no later than five (5) Days after receipt. All such meetings shall be deemed to be part of Basic Services.

(i) **Meeting Agendas:** For any meeting that Architect organizes, schedules and/or intends to conduct with the District, other Project Team members and/or any other persons connected with a Project or the District, the Architect shall provide a meeting agenda two (2) days prior to the meeting.

2.1.7. **Summarizations.** Except as otherwise directed by the District, Architect shall receive, review and take appropriate action with respect to all information, reports, notices, requests and other materials provided or available to Architect by or from Subconsultants and when requested shall prepare summaries of such materials for presentation to the District, together with the materials summarized and Architect's recommendations and advice with respect to the matters to which such materials relate.

2.1.8. **Overlapping, Duplicative Services.** Architect shall promptly advise the District if there appears to be an overlap or duplication of services being provided by or among Project Team members, along with Architect's recommendations for eliminating such duplication or overlapping of services.

2.1.9. **Sustainable Designs and Energy Standards.** Architect shall prepare its designs in accordance with the Sustainable Building Principles, Standards and Processes. Those Sustainable Design and Energy Standards services associated with projects that are determined as a Collaborative for High Performance Schools ("CHPS") Verified Project shall be undertaken only as authorized in accordance with the provisions of Article 3, Additional Services. The Architect acknowledges that it is the District's goal to achieve a high level of energy efficiency and

sustainability to be defined for each project. The Architect shall work with the District to balance functional, sustainable and financial design parameters toward meeting the District's goal.

2.1.10. District Committees. Architect shall, when requested by the District: (i) attend meetings of District Committees; (ii) assist District in preparing design presentations to and responding to questioning by District Committees; and (iii) provide necessary follow-up so that recommendations or directions of District Committees related to design matters are appropriately addressed.

2.1.11. Compliance with California Code of Regulations. Architect shall, in connection with its services performed during all Phases of Basic Services and, if applicable, any Additional Services, be responsible to comply with the Standard of Care in the application of the California Code of Regulations, including, without limitation Title 24, California Code of Regulations, relating to design and construction generally and construction of public schools specifically and shall fully cooperate with the Project Inspector assigned to the Project pursuant to said provisions of the California Code of Regulations and other Applicable Laws.

2.1.12. Design Safety. Architect is responsible for the safety of the design of the Project and for the interpretation of and any necessary amplification of the Drawings and Specifications prepared by it or its Subconsultants for the Project. The Architect shall neither have control over or charge of, nor be responsible for, the construction means, methods techniques, sequences or procedure, or for safety in, on or about the site, or safety precautions and programs in connection with the Work, since these are solely the Contractor's rights and responsibilities under the Contract Documents.

2.1.13. Prevailing Wages. Architect and its Subconsultants shall, to the extent applicable to work or services performed under this Agreement, comply with the provisions of the California Labor Code (including, without limitation, California Labor Code sections 1720, 1735, 1775, 1777.5 and 1776.6) applicable to persons performing services or work for "construction," including but not limited to inspection and land surveying work, as defined in California Labor Code section 1720. Pursuant to California Labor Code section 1773, the Department of Industrial Relations has determined the general prevailing rates of wages per diem, and for holiday and overtime work, in the locality in which this Agreement is to be performed, for persons performing such work or services and said rates are on file with the District at its principal office and available to any interested party upon request.

2.2. SCHEMATIC DESIGN PHASE

2.2.1. Project Program. The Architect shall, in conjunction with the District and any of the District's other Specialty Consultants in the areas of planning and programming, familiarize itself with the District's plans and goals for any Project assigned and make any recommendations for revisions that, based on Architect's professional judgment, will produce the Project that is designed in a manner that is in conformance with the requirements of the Project

Construction Budget and Project Schedule. The Project Construction Budget and Project schedule will be adjusted as necessary to accommodate the changes upon mutual agreement.

2.2.2. **Alternate Approaches.** The Architect shall review and recommend to the District alternative approaches to the design of each Project assigned and recommend alternative contracting modes for the District to evaluate which is best suited to the Project, the Project Schedule, Applicable Laws and Project Construction Budget for the Project assigned. The selection of a lease-leaseback, multi-prime, or design-bid-build method shall not affect the compensation due to the Architect for the Project.

2.2.3. **Schematic Documents.** The Architect shall prepare for review and approval by the District, Schematic Design Documents for each Project including site plans, floor plans, elevations, sections, 3-dimensional perspective views, and other sketches or graphic materials needed to describe the Project in three dimensions. Schematic Design Documents shall be consistent with the Project Construction Budget and Project Schedule for the Project and shall be submitted upon one hundred (100%) percent final revisions and review and approval by the District.

2.2.3.1. **Schematic Design Phase Deliverables.**

(A) **Site Documentation:** scaled preliminary Civil grading plan(s) including cut/fill calculations, and topographic contours; Landscape Architecture plan(s) including proposed plant species and materials; plans. Architectural site plan(s) illustrating major built site features.

(B) **Architectural Building Plans:** scaled floor plan(s) of all buildings including room names, general dimensions, and net square footage

(C) **Interior Design:** preliminary finish plans and materials palettes; reflected ceiling plans including anticipated finishes and materials; three-dimensional perspective views of selected spaces indicating materials and lighting; furniture and equipment plans; interior elevations of selected spaces.

(D) **Engineering and Systems Disciplines:** Mechanical systems diagrams; Electrical systems diagrams; Structural floor plan(s) and design diagrams including locations and rough sizing of columns, braced frames, trusses and other distinct structural elements; Acoustic design narrative; Audio/Visual design narrative; Data systems design narrative; Kitchen design plan(s) including equipment layouts and preliminary equipment list(s); Architectural design narrative.

(E) **Cost Estimate:** preliminary cost estimate, including mark-ups for contractor fees, O&P, insurance, bonds, contingencies, escalation and the like, coordinated and reconciled with the District.

2.2.4. Estimated Project Construction Cost. The Architect shall submit a preliminary written Estimated Project Construction Cost for the Project based on the Schematic Phase Design Documents submitted to the District for review and approval. The estimate shall address separately site work with utilities and building structures. The site work utilities estimate shall be itemized into major cost components. The building structure estimate shall be based on square foot cost reflective of the type of structure and systems involved. If the preliminary Estimated Project Construction Cost for the Project exceeds the Project Construction Budget for such Project, the District may, at its sole discretion and without limitation to any of the District's other rights or remedies for default that may exist at law or under this Agreement, either: (i) give written approval of an adjustment in the Project Construction Budget, or (ii) require the Architect, at its own cost and without additional compensation or reimbursement by the District, to revise the Schematic Design Documents in cooperation with the District so as to revise the Estimated Project Construction Cost to an amount that is within the Project Construction Budget.

2.3. DESIGN DEVELOPMENT PHASE

2.3.1. Design Development Documents. Upon the District's written authorization to proceed and based on Schematic Design Documents approved in writing by the District, the Architect shall prepare, for review and approval by the District, Design Development Documents for the Project consisting of Models, Drawings, outline Specifications and narratives as needed to establish and describe the function, size and character of the Project, elaborating and further developing the previously approved Schematic Design Documents. The Design Development Documents shall be submitted upon fifty (50%) percent completion for review and again upon one hundred (100%) percent completion for final revisions and review and approval by the District. The Architect shall incorporate into the Design Development Documents architectural, civil, landscape, structural, mechanical, plumbing, electrical, audio/visual, security, communication and information technology, fire and life safety, and access control systems, materials, and such other elements and other systems appropriate to the Project. The Design Development Phase Documents shall be consistent with and conform to any existing or approved District Standards during the term of the Project and shall be consistent with the Project Construction Budget and the Project Schedule. Should the District proceed to perform the Project in multiple phases, Architect may be required to provide Design Development Documents, and all related deliverables as further described herein, for each phase of the Project.

2.3.1.1. Design Development Phase Deliverables.

(A) Site Documentation. Scaled Civil rough and fine grading plan(s) including cut/fill calculations and topographic contours, vehicle and pedestrian circulation and parking; Landscape Architecture plan(s) including proposed plant species and materials, hardscape; plans; irrigation plans; site utility plans; Architectural site plan(s) illustrating major built site features and buildings.

(B) Architectural Building Plans. Overall, partial, and enlarged floor plan(s), reflected ceiling plan(s).

(C) Building Envelope. Building sections; typical wall sections and related details; exterior elevations.

(D) Interior Design. Finish floor plans; interior partition plans and key details; interior elevations; sections and elevations.

(E) Vertical Circulation. Enlarged floor plans and sections for stairs and elevators.

(F) Engineering and Systems Disciplines: Mechanical systems plans; Plumbing systems plans; Electrical systems plans; Structural floor plan(s) and calculations; Acoustic design narrative; Audio/Visual design narrative; Data systems design narrative; Kitchen design plan(s) including equipment layouts and preliminary equipment list(s); Architectural design narrative; Security and Access Control systems narrative and plans.

(G) Cost Estimates: updated cost estimates organized by specification section/trade/discipline, including mark-ups for contractor fees, O&P, insurance, bonds, contingencies, escalation and the like, coordinated and reconciled the District.

2.3.2. **Systems Criteria.** The Architect shall submit documentation supporting the design criteria for the structural elements (including structural loading); HVAC, plumbing, electrical, lighting and communication systems; and other specialized building systems.

2.3.3. **Certification Re Financial Relationships Disclosure.** In accordance with Public Contract Code § 3000, et seq., Architect and/or any of its Subconsultants including, without limitation, engineers or roofing consultants, who provide professional services related to the roofing portion of the Project shall prior to engaging in such professional services, complete, sign and deliver to the District the Certification Re Financial Relationships Disclosure, attached as Exhibit “B” to this Agreement. Any person who knowingly provides false information or fails to disclose a financial relationship shall be subject to civil liability and penalties as set forth in Public Contract Code 3006.

2.3.4. **Estimated Project Construction Cost.** The Architect shall submit a written Estimated Project Construction Cost for each Project based on the Design Development Phase Documents submitted to the District for review and approval. Including, if so required, a separate Estimated Project Construction Cost for each phase of the Project. If the Estimated Project Construction Cost for the Project exceeds the Project Construction Budget for such Project, the District may, at its discretion and without limitation to any of the District’s other rights or remedies for default that may exist at law or under this Agreement, either: (i) give written approval of an increase in that Project Construction Budget, or (ii) require the Architect, at its own cost, and without additional compensation or reimbursement by the District, to revise the Design

Development Phase documents in cooperation with the District so as to reduce the Estimated Project Construction Cost to an amount that is within the Project Construction Budget, in which case the District agrees to accept the Architect's reasonable revisions in the Project to lower the Estimated Project Construction Cost so long as the proposed revisions do not, in the District's sole and reasonable judgment, materially compromise the objectives of the Project.

2.4. CONSTRUCTION DOCUMENTS PHASE

2.4.1. Construction Documents. Upon the District's written authorization to proceed and based on Design Development Documents reviewed and approved in writing by the District, the Architect shall prepare Construction Documents for the Project consisting of Drawings and Specifications setting forth in detail the requirements for the construction of the Project suitable for review and approval by all authorities having jurisdiction, bidding, and construction. Should the District proceed to perform the Project in multiple phases, Architect may be required to provide Construction Documents, and all related deliverables as further described herein, for each phase of the Project. The Construction Documents shall describe the quality, configuration, size, location and relationships of all components to be incorporated into the Project. The Construction Documents shall be consistent with the Project Construction Budget and Project Schedule for the Project. Upon fifty (50%) percent, and ninety-five (95%) percent completion of the Construction Documents, Architect shall provide, in addition to the Construction Documents, a statement of the basis of the design, which includes the following: (i) an outline of Applicable Laws that apply to the Project; (ii) an outline of the criteria used as a basis of the design, including criteria for sustainability, civil, landscaping, architectural, structural, mechanical, plumbing and fire protection and electrical.

2.4.1.1. Construction Documents Phase Deliverables.

(A) **Site Documentation.** Civil plans, Landscape Architecture and irrigation plans; site utility plans; Architectural site plans; signage and wayfinding plans and details; fire and emergency access plans.

(B) **Architectural Building Plans.** Overall, partial, and enlarged floor plans, code analysis plans; reflected ceiling plans; all related and required Architectural details.

(C) **Building Envelope.** Building sections; wall sections and related details; exterior elevations; roof plans and details.

(D) **Interior Design.** Finish floor plans; interior partition plans and typical details, including Acoustic requirements; interior elevations; typical interior details; typical and specific millwork plans, sections and elevations; FF&E plans and specifications.

(E) **Vertical Circulation.** Enlarged floor plans, sections, and details for stairs and elevators.

(F) **Engineering and Systems Disciplines:** Mechanical systems plans and details; Plumbing systems plans and details; Electrical systems plans and details; Lighting system and controls plans and details; Structural floor plans, details, and calculations; Acoustic design integrated into Architectural plans; Audio/Visual system plans and details; Data systems plans and details; Kitchen design plans including equipment layouts and equipment lists with associated details; Security and Access Control systems plans and details; Fire alarm systems plans and specifications; Fire sprinkler system plans, details and specifications

(G) **Standard Building Elements:** Door schedules; hardware schedules; window schedules

(H) **Cost Estimates:** Updated cost estimates organized by CSI specification section/trade/discipline, including mark-ups for contractor fees, O&P, insurance, bonds, contingencies, escalation and the like, coordinated and reconciled with the District.

(I) **Project Manual:** CSI-format specifications including Division 1, integrated with District front-end project manual documents.

2.4.2. **Review.** The Architect shall submit Construction Documents to the District for review and approval by the District upon fifty (50%) percent completion, ninety-five (95%) percent completion and one hundred (100%) percent completion. Such submittal shall be in electronic format and shall include, the Construction Documents, a summary of the calculations for the structural, HVAC, electrical, plumbing, communications and other specialized building system calculations. Unless directed otherwise in writing by the District, the Construction Document Phase shall not be considered 100% complete until all approvals by Review Agencies have been received by the Architect.

2.4.3. **Content, Coordination, Completeness.** The Architect shall be responsible for the content of all Construction Documents prepared by it and its Subconsultants. Consistent with the Standard of Care, all final Construction Documents prepared and signed by the Architect or its Subconsultants shall be complete, coordinated and contain directions as will (i) enable a competent contractor to carry them out; (ii) require a minimum of corrections by Review Agencies; and (iii) be sufficiently complete and free of conflicts so as to be capable of definitive pricing by Contractor with a minimum of further clarifications or detailing by Architect or its Subconsultants.

2.4.4. **Corrections.** Construction Document submittals shall either incorporate any corrections required by the District or Review Agencies or be accompanied by a written statement as to why such changes were not incorporated. The District may, in its sole and reasonable discretion, reject or challenge the Architect's explanation and require the Architect to make the changes or corrections and/or provide additional supporting documentation regarding the Architect's determination not to incorporate the changes to the Construction Documents as previously requested by the District or Review Agencies. Except with respect to a change in Program or a change in law, where such change could not have been reasonably foreseen by

Architect, such corrections shall not constitute grounds for adjustment of any Project Construction Budget or Project Schedule.

2.4.5. Constructability and Design Review; Value Engineering. The District reserves the right to conduct, or cause to be conducted, constructability reviews and/or value engineering of the Construction Documents. If applicable, such constructability reviews and/or value engineering to meet the District's established budget may be required at each phase of the Project. If the District elects to conduct either constructability reviews or value engineering, the District shall notify the Architect of the same and the Architect shall submit Construction Documents to the District for such constructability reviews and/or value engineering. The District and Architect will confer and consult with each other to arrive at mutual understandings and agreements as to which of the constructability review and/or value engineering comments are to be incorporated into the Construction Documents. The Construction Documents shall incorporate mutually agreed upon comments and the Architect shall submit revised Construction Documents to the District for approval. Architect shall revise Construction Documents as necessary to obtain the District's reasonable approval thereof.

2.4.6. Final Approval. When all District and Review Agency required corrections have been incorporated by the Architect, the corrected, one hundred (100%) percent complete Construction Documents approved by the Review Agency will be deemed to be final and ready for competitive pricing. The Architect shall provide to the District three (3) full sized printed sets (or other mutually agreed upon quantity) of approved (stamped/signed) prints. The Drawings and Specifications shall also be submitted by the Architect to the District in an electronic form acceptable to the District.

2.4.7. Estimated Project Construction Costs.

(i) Upon fifty (50%) percent, ninety-five (95%) percent DSA Submittal set and final one hundred (100%) percent completion of the Construction Documents, the Architect shall prepare and submit for the District's review and approval, the Architect's then-current Estimated Project Construction Cost for the Project, including, if so required, a separate Estimated Project Construction Cost, as detailed herein, for each phase of the Project.

(ii) If the Estimated Project Construction Cost of the Project upon fifty (50%) percent completion of Construction Documents for such Project exceeds the Project Construction Budget for such Project, either the District may, in its sole discretion and without limitation to any of the District's other rights or remedies for default that may exist at law or under this Agreement, either: (i) give written approval of an adjustment in the Project Construction Budget, or (ii) require the Architect, at its own cost and without any additional compensation or reimbursement by the District, to revise the Construction Documents in cooperation with the District so as to reduce the Estimated Project Construction Cost to within the Project Construction Budget, in which case the District agrees to accept the Architect's reasonable revisions in the Project to lower the Estimated Project Construction Costs, so long as the proposed revisions do

not, in the District's sole and reasonable judgment, materially compromise the aesthetic, structural or functional elements of the Project.

If the Estimated Project Construction Cost for the ninety-five (95%) percent Construction Documents for the Project exceeds the Project Construction Budget for such Project, the District may, in their sole discretion and without limitation to any of the District's other rights or remedies for default that may exist at law or under this Agreement, either: (i) give written approval of an adjustment in the Project Construction Budget, (ii) authorize the solicitation of bids, (iii) require the Architect, at its own cost and without additional compensation or reimbursement by the District, to revise the Construction Documents in cooperation with the District so as to reduce the Estimated Project Construction Cost to within the Project Construction Budget, in which case the District agrees to accept the Architect's reasonable revisions in the Project to lower the Estimated Project Construction Costs, so long as the proposed revisions are consistent with Building Program for that Project and do not, in the District's sole and reasonable judgment, materially compromise the aesthetic, structural or functional elements of the Project or the overall Project.

2.4.8. Permits, Governmental Approvals. The Architect shall assist the District in obtaining all necessary approvals or permits for the Construction Documents from governmental agencies with jurisdiction therefor as necessary for the bidding and construction of the Work including without limitation, approvals by DSA. Without adjustment of the Compensation, Architect shall revise Working Drawings as required by DSA or other governmental agencies with jurisdiction over the Project to obtain their respective approval(s) or permit issuance. Architect shall notify the District in writing upon receipt of such approvals or permits specifying in detail the scope of Work covered thereby and recommend to the District whether and when all approvals and permits that Architect is aware are required by Applicable Laws have been obtained such that the District may proceed to let contracts for the Work. Architect shall notify the District ninety (90) Days prior to the date that any approval or permit by a Government Authority may expire.

2.5. BIDDING PHASE

2.5.1. Prequalification. If prequalification of bidders for construction of the Project is required by the District, the Architect shall assist in preparation of the prequalification documents. If requested, the Architect shall participate with the District in evaluation of prequalification submittals by proposed bidders.

2.5.2. Bidder Inquiries; Bid Addenda, Site Visits. The Architect shall review bidder inquiries, participate in discussions relating to responses to bidders' inquiries, participate in development of necessary modifications to the Design Documents to respond to bidder inquiries and assist in development and issuance of addenda during the bidding process. The Architect and its Subconsultants, as appropriate, shall attend all scheduled pre-bid conferences and Site visits.

The District shall be responsible for the scheduling of all pre-bid conferences and Site visits as well as the recordation, preparation and distribution of minutes.

2.5.3. **Bid Evaluations.** The Architect shall assist the District in the review and evaluation of bids.

2.5.4. **Project Construction Budget Overrun.** If the lowest price received from a responsible and responsive bidder (as the terms “responsible” and “responsive” bidder are interpreted under Applicable Laws) for the Project exceeds the Project Construction Budget for such Project by more than ten (10%) percent for Projects costing less than seven million dollars (\$7,000,000), or by more than five (5%) percent for Projects costing seven million dollars (\$7,000,000) or more, the District may, at its sole discretion and without limitation to any of the District’s other rights or remedies for default that may exist at law or under this Agreement, do any of the following: (i) give written approval of an increase in the Project Construction Budget, (ii) authorize rebidding within a reasonable period of time, (iii) require the Architect to modify the Construction Documents in order to reduce the Estimated Project Construction Cost to a level that falls within the Project Construction Budget, or (iv) abandon the Project. If the District requires the Architect to revise the approved Construction Documents pursuant to Clause (iii) above, revisions proposed by the Architect shall be consistent with the District’s objectives for such Project, and shall not, as determined by the District in the District’s sole and reasonable judgment, materially compromise the aesthetic, structural or functional elements of the Project. Compensation to the Architect, if any, for such revisions shall be determined as follows: The District shall obtain an independent estimate of the Construction Cost. If such independent estimate is within the Project Construction Budget, and if the lowest responsible and responsive bid price nevertheless exceeds the Project Construction Budget, then Architect shall be entitled to receive compensation for executing such revisions in an amount not exceeding 100% of the total Additional Services. If the District’s independent estimate exceeds the Project Construction Budget prior to bid, and if the lowest responsible and responsive bid price exceeds the Project Construction Budget and if the District elects to require the Architect to revise the Construction Documents, the Architect shall perform any such revisions at its own expense and without additional compensation or reimbursement by the District.

2.5.5. **Basic Services Fee.** If the lowest bid or proposal meets or exceeds one hundred and five (105%) percent of the amount designated as the Project Construction Budget at the time of bid, the “Computed Cost” for Architect’s Fee for Basic Services shall be based on such Project Construction Budget amount, plus any additive alternates not taken, plus any change orders for additional scope of work, unless Architect can demonstrate good cause to the District.

2.5.6. Should the District proceed to perform the Project in multiple phases, Architect may be required to provide all services related to the Bidding Phase as set forth in this Section 2.5, and any and all related deliverables as further described herein, for each phase of the Project.

2.6. CONSTRUCTION PHASE

2.6.1. **Duration.** For the Project that is let to a Contractor the Construction Phase will commence on the date the Construction Contract is signed by the District and will terminate upon Final Completion of the Work covered by such Construction Contract.

2.6.2. **Administration.** The Architect's responsibilities shall include, without limitation, as outlined in Section 2.6.8 below, interpretation of the design requirements of the Contract Documents; periodic Site observations; review of Submittals; responding to requests for information or clarification by Contractors and Separate Contractors; preparation of documents for Change Orders; general consultation on design matters; and administration of the Construction Contract as provided in the General Conditions. Architect shall maintain, and furnish to the District upon request, written digital logs documenting the status of project correspondence related to the above-described responsibilities.

2.6.3. **Notices.** Architect shall provide such notices as may be required by Applicable Laws to Governmental Authorities and are customarily provided by Architects on behalf of clients, including, without limitation DSA, that Work is being, or is about to be, carried on at the Site and any required information concerning the identity of the Contractor and other required information concerning performance of the Work.

2.6.4. **Attendance at Meetings.** The Architect shall attend all necessary pre-construction and regular construction meetings with the Contractor. Attendees shall be the Project Architect, its Subconsultants, Contractor, the District, and others as deemed necessary by the Architect. The regular construction meetings shall, unless otherwise directed by the District, occur weekly. The Architect shall prepare and distribute construction meeting notes.

2.6.5. **Communications.** The District will furnish the Architect with copies of written communications from the District to a Contractor. With respect to matters relating to design that may be addressed in such communications, unless the Architect, within ten (10) Days of receipt of a written communication to the Contractor provides written notification to the District that the Architect disagrees with the content of the written communication, specifying the reason for the disagreement, the Architect shall be deemed to agree with the content of such communication. The Architect shall advise and consult with the District and shall keep them informed of the observed progress of the Work. Architect shall render written or graphic interpretations and decisions that are consistent with the intent of, and reasonably inferable from, the Contract Documents; review and recommend any action to be taken regarding Submittals; and evaluate and advise the District on the equivalence of proposed substitutions for materials, products, or services specified by brand or trade names in the Contract Documents and recommend either approval or rejection of the substitutions as being equal in quality, utility and appearance.

2.6.6. **No Delay.** The Architect shall not delay its interpretations, decisions, reviews or other functions pursuant to this Agreement or otherwise cause or contribute to a

disruption of construction or a delay to the Project, consistent with the applicable Standard of Care. Toward this end, Contractor's Request(s) for Information (RFI) shall be responded to within a maximum of ten (10) Days from receipt of the RFI, and Contractor's submittals of shop drawings and product data shall be reviewed and returned within a maximum of twenty-one (21) Days from submittal. In accordance with the approved submittal schedule, the Architect shall review and approve or take other appropriate action upon the Contractor's submittals such as Shop Drawings, Product Data and Samples, but for the purpose of checking for general conformance with information given and the design concept expressed in the Contract Documents. Architect shall only be responsible for a review that complies with the applicable Standard of Care, and an approval by the Architect shall not relieve the Contractor from its responsibility to comply with the Contract Documents. The Architect's review shall not constitute approval of safety precautions or, unless otherwise specifically stated by the Architect, of any construction means, methods, techniques, sequences, or procedures. The Architect's approval of a specific item shall not indicate approval of an assembly of which the item is a component.

2.6.7. Corrections. The Architect shall, at no cost to the District, promptly and satisfactorily correct any and all errors, omissions, deficiencies, ambiguities, conflicts or violations of Applicable Laws in the Construction Documents prepared by the Architect or its Subconsultants.

2.6.8. Site Observations. Subject to the limitations of Paragraph 2.6.13 below, the Architect, and its Subconsultants as appropriate to the stage of the Work of the Project, shall not less frequently than weekly: (i) observe construction at the Site as it progresses; (ii) conduct Site observations in connection with occupancy and completion; and (iii) check fabricated materials and equipment located on or outside the Site when such checks are specified in the Contract Documents. All such observations shall be conducted in accordance with the Standard of Care. Such observations shall address matters relating to: the general progress, character, and complexity of the Work; design issues or questions of concern to the Architect or its Subconsultants, or as noted in any inspection reports furnished to the Architect; the observed quality of Contractor's performance during previous visits; the review of construction of crucial components of the Work; and the results of specified or directed tests significant to the acceptability of crucial components of the Work. Such observations shall be performed by Architect and its Subconsultants when reasonably requested by the District or as appropriate to the stage of the Project. Without limitation to the foregoing, observations shall be for the purpose of ascertaining the general progress of the Work and that the character, scope, quality and detail of construction (including workmanship and materials) generally comply with the Contract Documents, approved Submittals and clarifications. Observations shall be separate from any inspections which may be provided by others and such inspections by others shall not relieve the Architect of its responsibilities under this Agreement. Any Sub consultant who has prepared designs or specifications shall be responsible to observe in accordance with the provisions of this Agreement those portions of the Work that he/she has so designed or specified. However, neither the Architect nor any Sub consultant shall be required to make exhaustive or continuous on-site inspections to check the quality or quantity of the Work. The Architect shall be responsible for its negligent acts or omissions but shall not have control over or charge of and shall not be responsible

for acts or omissions of the Contractor, Subcontractors, or their agents or employees, or of any other persons or entities performing portions of the Work.

2.6.9. **Defective Work.** The Architect shall recommend to the District and the Project Inspector, in writing, the rejection of observed Defective Work.

2.6.10. **Testing, Inspection.** The Architect shall recommend in writing special inspection or testing of the Work in accordance with the provisions of the Contract Documents if, in the Architect's professional judgment, such inspection or testing is necessary or advisable for the implementation of the Contract Documents or required by Applicable Laws, regardless of the status of the Work. The Architect shall review inspection reports, laboratory reports and test data to determine conformity of such data with the design requirements expressed in or implied by the Contract Documents and approved Submittals. The Architect shall recommend to the District, in writing, actions that need to be taken, as determined by Architect from Site visits, inspections, observations, reports, laboratory reports and test data, or from Contractor proposals, schedules or other relevant documents.

2.6.11. **Substantial, Final Completion.** The Architect shall accompany and assist the District to evaluate Substantial Completion, Final Completion, and preparation of a “punch list” of minor items of work to be completed or corrected for Final Completion. The Architect shall review the punch list, advise the District and Project Inspector whether items listed thereon have been completed in accordance with the requirements of the Contract Documents and issue such recommendations of Substantial Completion and Final Completion as may be requested by the District. The Architect shall review for conformance with the Contract Documents all Record Documents and other items required by the Contract Documents to be delivered by Contractor as a condition of the final payment to such Contractor. In addition to the foregoing, Architect shall, based on its evaluations of the Work, notify the District and Project Inspector when the Work is completed to the point that, in the opinion of the Architect, a notice of completion required by Section 4-339, Part 1, Title 24 of the California Code of Regulations may be filed.

2.6.12. **Interpretations.** The Architect shall, upon request by the District, issue interpretations and clarifications of the requirements of the design requirements of the Contract Documents. Such clarifications and interpretations shall be transmitted to the District in writing.

2.6.13. **Construction Means, Methods, Safety.** The Architect in the course of performing its other obligations under this Agreement shall report to the District any observed material or substantive conditions that render any portion of the Work unsafe; provided, however, that the foregoing obligation shall not relieve Contractors of their sole responsibility for construction means, methods, techniques, sequences, procedures or safety precautions and programs in connection with the Work nor create an affirmative obligation on the part of the Architect to discover safety issues.

2.6.14. Change Orders. The Architect shall prepare Drawings and Specifications as specifically requested by the District in connection with the issuance of Field Instructions and Construction Change Documents and secure approvals thereof by the applicable Governmental Authorities, including, but not limited to, DSA, in accordance with Applicable Laws prior to the commencement of the Work thereof. When requested or when necessary to maintain progress of the construction, Architect shall prepare, submit and obtain approval by DSA of Construction Change Documents, followed promptly by submittal of a formal Change Order. Architect shall be entitled to compensation for the preparation of Drawings and Specifications in connection with the issuance of Field Instructions and Change Orders to the extent allowed by Article 3 of this Agreement. The Architect shall not be entitled to compensation for the preparation of Drawings and Specifications necessitated by errors, omissions, deficiencies, ambiguities, conflicts or violations of Applicable Laws caused or created by the Architect or its Subconsultants.

2.6.15. Record Documents.

(i) The Architect shall review As-Builts prepared and certified by the Contractor and reviewed by the Project Inspector in a format acceptable to the District. Architect is entitled to, consistent with the Standard of Care, reasonably rely upon the accuracy of the As-Builts prepared and certified by the Contractor and shall review the same in accordance with the Standard of Care. If significant discrepancies are noted by the Architect in the course of its review, the Architect shall return the As-Built to the Contractor, and, following corrections by the Contractor, return the As-Built to the Architect and the District for further review.

(ii) Within six (6) weeks after receipt of Contractor's complete and corrected As-Built, the Architect shall, at no additional cost, draft and furnish to the District Record Documents showing the as-built condition of all portions of the Work (including without limitation the location of electrical, HVAC, plumbing and other lines that may be diagrammatically represented in the Contract Documents), and one (1) annotated hardcopy of the Specifications and one (1) flash (thumb) drive in software format acceptable to the District. The revisions and changes reflected in the As-Built shall be coordinated and accurately annotated and cross-referenced by the Architect from the Contractor prepared As-Built. Each page of the Drawings and the coverage page of the annotated Specification shall prominently bear the words "Record Documents."

(iii) Record Drawings shall be submitted by the Architect to the District in both hard copy and an electronic form acceptable to the District.

2.6.16. Title 24 Reports. Architect and its Subconsultants who are in charge of general observation of the Work shall, in accordance with the provisions of Part 1, Title 24 of the California Code of Regulations, prepare and file periodic verified reports on forms prescribed by DSA affirming that of his/her own personal knowledge (as defined in Ed. Code, § 81141, Reports required of architects, engineers and/or inspectors; information required) the Work performed during the period of time covered by the report has been performed and materials have been used and installed in every material respect in compliance with the Drawings and Specifications

approved by the DSA for the Project, together with such other detailed statements of fact as DSA may require.

2.6.17. Should the District proceed to perform the Project in multiple phases, Architect may be required to provide all services related to the Construction Phase as set forth in this Section 2.6, and any and all related deliverables as further described herein, for each phase of the Project.

2.7. PROJECT CLOSE-OUT PHASE

2.7.1. **Close-Out Documents.** The Architect shall compile and assemble the Contractor's Close-Out Documents for delivery to the District, including without limitation, As-Built Drawings, Operations and Maintenance manuals, key schedules, warranties, and all Record Documents required at Close-Out as referenced in Article 2.6.15 herein. The Consultant shall prepare and submit for processing such documentation as required by governmental agencies, including DSA, in connection with completion of the Work of the Project.

2.7.2. **Warranty Observation.** The Architect shall conduct a review of the Work one month prior to the warranty expiration for the purpose of observing the condition in the Work. Architect shall make written recommendations to the District for the correction of any Defective Work discovered in the course of the Architect's review within fifteen (15) Days after the date of such review. The Architect shall be accompanied by the District during its review of the Work. The number of work hours to complete such review and preparation of written recommendations shall not exceed fifty (50) hours for any single Project, excluding review and preparation necessitated in whole or in part by errors and omissions in the services performed by the Architect or its Subconsultants. Hours in excess thereof shall be compensated as Additional Service only if approved in advance in writing by the District.

2.8. INDEPENDENT REVIEWS

2.8.1. This Project is subject to independent design reviews conducted by the District and at the District's expense. The Architect shall participate in these design reviews including without limitation: Constructability Review and/or Value Engineering of the Design Documents.

2.8.2. The Architect shall have an obligation to incorporate into the Design Documents any and all Value Engineering and Constructability Review comments into the Project Design Documents that are approved and accepted by the District, unless doing so would result in a violation of Applicable Laws or the Standard of Care. Except as set forth in Article 3, such changes shall be made with no additional compensation or reimbursement. Should the Architect deem changes would be a violation of Applicable Laws, they shall immediately notify the District in writing citing the code section number and violation. The District shall have the right, but not

the obligation, to have an independent cost estimate conducted by an estimator designated by the District and at the District's expense. The Architect shall be available to answer the estimator's questions regarding the design and to attend meetings with the estimator as reasonably necessary to reconcile the Architect's estimate with the independent estimate.

2.9. PROJECT SCHEDULE

2.9.1. The Architect shall meet the requirements of the Project Schedule, including without limitation the dates for completion of each Phase of the Architect's Basic Services for the Project.

2.9.2. The Architect shall be entitled to an adjustment to the Project Schedule for unavoidable Delays that are: (i) beyond the Architect's control or its responsibility under this Agreement and/or (ii) not caused by the fault, negligence or violation of a provision of this Agreement by Architect or its Subconsultants; provided, however, that as a condition precedent to its right to an adjustment of a Project Schedule, Architect shall have given written notice to the District of the circumstances of such delay within fourteen (14) Days after such circumstances were first observed by Architect or its Subconsultants. Failure to provide such written notice may result in a waiver by Architect of any right to an adjustment to that Project Schedule on account of such circumstances.

ARTICLE III ADDITIONAL SERVICES

3.1. LIST OF ADDITIONAL SERVICES

Unless otherwise agreed by District, the following constitutes the list of Additional Services for which Architect is entitled to Additional Services compensation pursuant to Section 5.1.2 of this Agreement. The Additional Services described in this Article 3 are not included in the scope of Architect's Basic Services for the Project. Architect shall notify the District prior to providing any such Additional Services and in no event not later than fifteen (15) Days after it learns of any circumstance (including, without limitation, any direction or request by the District) that Architect believes may give rise to performance of Additional Services. The District may in its sole discretion direct the Architect to proceed or not proceed with all or any portion of Additional Services described in Architect's written notice.

3.1.1. Except as set forth in Articles 1 or 2 as part of Basic Services, providing planning surveys, Site evaluations, or environmental studies.

3.1.2. Providing services beyond those provided for in Articles 1 or 2 of this Agreement to investigate existing conditions or facilities, to make measured drawings thereof, or to verify the accuracy of drawings or other information furnished by the District.

3.1.3. Providing planning, programming and/or educational specification services.

3.1.4. Providing financial feasibility studies or other special studies.

3.1.5. Preparing revisions to the documents during the Schematic Design, Design Development or Construction Documents Phases, when these revisions are: (i) necessary to implement changes, additions, or deletions to a Project that are requested and approved by the District in writing; (ii) the result of issuance by the District of written directives or instructions that conflict with prior written directives or instructions by the District; (iii) necessitated by the enactment or revision of codes, laws or regulations where such enactment or revision could not have been reasonably foreseen by Architect; or (iv) due to the District's failure to render decisions in a timely manner; provided, however, that under no circumstances shall the Architect be paid Additional Services compensation to the extent due to: (a) its or its Subconsultant's errors, omissions, conflicts, ambiguities or violation of applicable laws; or (b) modifications to the Drawings, Specifications or other Design Documents prepared by Architect or its Subconsultants in accordance with Paragraphs 2.2.4, 2.3.4, 2.4.7 or 2.5.4 to bring the Construction Cost within the Project Construction Budget.

3.1.6. Providing services related to future facilities, systems and equipment that are not intended to be constructed during the Construction Phase.

3.1.7. Providing detailed quantity surveys or inventories of material, equipment and labor.

3.1.8. Making investigations or taking inventories of materials or equipment or making valuations and detailed appraisals of existing facilities.

3.1.9. Providing analyses of owning and operating costs (except as needed to prepare energy calculations, which are deemed part of Basic Services).

3.1.10. Providing perspective drawings, models and mock-ups, including slides thereof.

3.1.11. Providing services as necessary to correct Defective Work not caused or created by any errors, omissions, conflicts, ambiguities, or violations of Applicable Laws in the Design Documents prepared by Architect or its Subconsultants.

3.1.12. Providing extensive assistance in the selection or utilization of any equipment or system; preparing operation and maintenance manuals; and training personnel for operation and maintenance.

3.1.13. Providing services for the Project after Final Completion of such Project, except as such services that relate to the Warranty Observation Phase described in Section 2.7.2 of this Agreement.

3.1.14. Providing services in connection with a pending public hearing, mediation, arbitration proceeding, or legal proceeding, except where: (i) the Architect is Party thereto; or (ii) the Architect is a Party to any related proceeding in which Architect is alleged to be responsible for a Loss that is the subject of such pending public hearing, mediation, arbitration proceeding or legal proceeding; or (iii) the Architect is a percipient witness (in which case the Architect shall be entitled to witness fees and costs as allowed by law); or (iv) it is alleged by one or more parties to the pending public hearing, mediation, arbitration proceeding, or legal proceeding that the negligent, reckless or willful acts, omissions or other conduct of Architect or its employees, agents, Subconsultants or representatives have caused or contributed to the claims, damages, and/or demands asserted in the pending public hearing, mediation, arbitration proceeding, for legal proceeding, then such services shall be provided to the District at no cost.

3.1.15. Providing Expert Witness services in connection with a pending public hearing, mediation, arbitration or legal proceeding where Architect is not a named Party.

3.1.16. Providing services made necessary by the termination of a Contractor, but only to the extent such services exceed the level of service that would have been provided in the absence of such termination.

3.1.17. Providing services to make revisions in approved Schematic Design, Design Development or Construction Documents due to inaccuracy in any surveys, test data or other information provided by the District pursuant to Section 4.2 of this Agreement.

3.1.18. Performance of any design service expressly excluded from a Project Authorization.

3.1.19. Services for the Warranty Observation Phase in excess of those provided for in Section 2.7.2, above. Master Planning services regarding the District Projects defined in this Agreement.

3.1.20. Preparation of design and documentation for alternate bid or proposal requests proposed by the District.

3.1.21. Providing the services of special inspectors unless included in a Project Authorization.

3.1.22. Providing contract administration services after the construction contract time has been exceeded through no fault of the Architect.

3.2. DISPUTES

3.2.1. **Notice and Waiver of Compensation by Architect.** Except as provided in Paragraph 3.2.2 below, Architect's failure to notify the District in writing and secure the District's approval of said Additional Services prior to performing Additional Services shall be deemed a waiver of Architect's right to compensation for such Additional Services performed without written authorization, unless otherwise agreed upon in writing by the District.

3.2.2. **Disputed Additional Services.** If a dispute arises as to whether any service constitutes an Additional Service or a Basic Service, the Architect will nevertheless promptly perform such services, if requested to do so in writing by the District, in which case neither the District's request, Architect's performance nor the acceptance of such disputed services by the District will constitute or be deemed to be a waiver on the part of the District or the Architect of its rights with respect to the appropriate classification of the services rendered. District shall continue to pay Architect for all undisputed services during the pendency of any dispute.

ARTICLE IV DISTRICT RIGHTS AND RESPONSIBILITIES

4.1. ADMINISTRATION

4.1.1. **Responses.** The District shall promptly respond to Architect's submittals and requests for decisions, approvals or information; provided, however, that no failure by District to respond shall entitle Architect to an adjustment of a Project Schedule unless District has failed to respond within seven (7) Days to a written notice by Architect to the District expressly stating that a response is overdue and specifically informing the District that a response is necessary in order to avoid a delay to a Project Schedule.

4.1.2. **Specialty Consultants.** The District shall furnish the services of Specialty Consultants for design reviews and other services which the Architect is not required to provide pursuant to Article 2 of this Agreement.

4.1.3. **Revisions by the District.** The District reserves the right exercised in its sole discretion to revise the Project Budget, Project Construction Budget and Project Schedule. Architect's sole and exclusive right to additional compensation and/or extension of time for such revisions shall be as set forth in this Agreement.

4.2. SURVEYS AND REPORTS

4.2.1. **General.** The District shall furnish such structural, mechanical, electrical, chemical, hazardous materials, soils and other tests, inspections and reports as required by Applicable Laws or by the Contract Documents and which are not required to be furnished by the Architect under this Agreement or by the Contractor under the Contract Documents.

4.2.2. **Surveys, Legal Restrictions.** If required for the performance of the Architect's services, the District shall furnish a land survey of the Site, giving (as applicable) grades and lines of streets, alleys, pavements and adjoining property; rights-of-way, restrictions, easements, encroachments, zoning, deed restrictions, boundaries and contours of the Site; locations, dimensions and floor elevations pertaining to existing buildings, other improvements and trees; and information in the District's possession concerning available service and utility lines, both public and private.

4.2.3. **Geotechnical.** The District shall furnish geotechnical data and reports, or employ Specialty Consultants to provide such data or reports, when reasonably deemed necessary by the Architect, including test logs, soil classifications, soil bearing values and other data and information necessary to define subsoil conditions.

4.2.4. **District Expense.** The services, information, surveys and reports required by this Article 4 shall be furnished at the District's expense.

4.2.5. **Reliance on Documents Provided by the District.** Architect shall be entitled to rely upon the accuracy and sufficiency of the documents provided by the District in performing its obligations under this Agreement. In the event that the information contained in such documents is found to be inaccurate, incomplete or insufficient, or in the event that other surveys, data, reports or information, known or unknown, although available to the District, were not provided, even if such information if disclosed, would have been material to Architect's performance of this Agreement, the District shall have no liability to Architect, other than for payment for authorized Additional Services necessary to correct Design Documents. Architect shall not be entitled to damages for breach of contract.

4.2.6. **District Consultants.** Except for the Architects retained by the Design Professional, the District shall furnish all legal, accounting, insurance and other consulting services as may be necessary to meet the District's needs for the Project.

ARTICLE V COMPENSATION

5.1. COMPENSATION.

5.1.1. For designated services, compensation shall be determined in advance by the Architect and the District, and set forth in an executed Project Authorization.

5.1.2. For Additional Services, unless otherwise agreed upon by the Parties, Architect shall bill based upon the rates as stated on the Architect's Hourly Rate schedule which shall be attached to the Project Authorization. The rates shall remain the same for the duration of

each project. Architect shall, if requested by the District prepare a proposal for any additional services and/or adhere to any not-to-exceed limit reasonably requested by the District.

5.2. CONSTRUCTION PHASE CHANGES.

The Compensation for the Basic Services for the Project is not subject to adjustment unless there are Changes authorized by the District during the Construction Phase of the Project which are not the result of errors, omissions or other defects in the Design Documents or failures of the Architect or its Subconsultants to timely and completely perform the Basic Services. If services of the Architect or its Subconsultants are required in connection with Changes during the Construction Phase of the Project which do not result from errors, omissions or other defects in the Design Documents or failures of the Architect or its Subconsultants to timely and completely perform the Basic Services, the Compensation will be equitably adjusted by an amount equal to the lesser of eight (8%) percent of the Construction Costs of such Changes or the time of the Architect and/or its Subconsultants reasonably necessary to provide design and related support services for such Changes multiplied by the applicable hourly rate(s) set forth in the Rate Schedule included in the Project Authorization. If a Change during the Construction Phase of the Project is the result of errors, omissions or other defects in the Design Documents or failures of the Architect or its Subconsultants to timely and completely perform the Basic Services, services required of the Architect or its Subconsultants in connection with such Change shall not result in adjustment of the Compensation.

5.3. REIMBURSABLE EXPENSES.

The Compensation for Architect's Basic Services for the Project includes all costs and expenses of a non-capital nature reasonably and necessarily incurred by Architect to perform the Basic Services including without limitation expenses for postage, delivery, office supplies, reproduction of plans and prints, photographic film and development and travel to and from the offices of the Architect and its Subconsultants to the Site, the District's Administrative offices and within the counties noted above. Unless expressly authorized in advance by the District, no payment will be made by the District for expenses or costs of any kind, type or nature.

5.4. RECORDS.

Accurate and detailed records of Reimbursable Expenses pertaining to the Project shall be maintained in an orderly manner on the basis of generally accepted accounting practices and shall be available at Architect's office and at the District's request, shall be brought by Architect for inspection, auditing and/or copying by the District and its representatives pursuant to Article 7 of this Agreement.

ARTICLE VI PAYMENTS

6.1. APPLICATIONS FOR PAYMENT

6.1.1. **Monthly Applications.** Architect shall submit an invoice, monthly to the District, accompanied by such documentation as required by this Agreement, setting forth in detail the: (i) invoices, shall be based upon the percentage of work performed in the previous month and shall not exceed the total portion of the Compensation apportioned set forth in paragraph 5.1, above; (ii) Progress payments for Basic Services shall be based on the percentage of Basic Services performed in the previous month and shall not exceed the allocated percentage for each phase of the Basic Services set forth in paragraph 6.2.1, below; (iii) compensation for authorized Additional Services rendered; and (iv) authorized Reimbursable Expenses incurred and paid during the previous month.

6.1.2. **Accompanying Documentation.** Invoices submitted for payment shall be accompanied by a detailed summary description of the progress of performance to date, (a) a description of the status of completion of Basic Services by percent complete; (b) a description of the percent complete of any Additional Services and summary of hours worked; (c) Reimbursable Expenses incurred during the previous 60-Day period of time accompanied with backup documentation, invoices, receipts and other documentation reasonably requested, by the District to verify the amounts of Reimbursable Expenses for which reimbursement is sought for the Invoice submitted for payment.

6.2. PAYMENTS

Payments of undisputed sums due shall be made by District monthly within thirty (30) Days after receipt by the District of a proper and timely Invoice.

6.3. PAYMENT DISPUTES

Notwithstanding any provision of this Agreement to the contrary, if the District shall, in good faith, dispute the amount due the Architect under any billing invoice submitted by the Architect under this Agreement, pursuant to Civil Code, section 3320 subdivision (a), (Contracts for public works of improvement; progress and final retention payments to prime design professionals; dispute; penalty; nature and application), the District may withhold from payment to the Architect an amount not to exceed one hundred and fifty (150%) percent of the disputed amount.

In the event of any good faith dispute as to whether a particular payment or a portion of a particular payment is owed or not owed by the District to Architect under this Agreement, the District shall have the right to do either of the following: (i) make all or part of such disputed payment to Architect without prejudice to the District's right to contest the amount so paid; or (ii) withhold

from payment to the Architect an amount not to exceed one hundred and fifty (150%) percent of the disputed amount. Pursuant to Civil Code section 3320 subdivision (a), should the District withhold all or a portion of any payment invoiced by Architect, the District shall so notify Architect in writing of the reasons, therefore. From and after Architect's receipt of such notice, the District and Architect shall use their good faith efforts to resolve their dispute within sixty (60) Days, provided however, that if the dispute is not resolved, the District may continue to hold amounts in dispute and Architect shall not be entitled to terminate this Agreement or suspend its services hereunder on account of such nonpayment. In any action for the collection of amounts withheld in violation of this section, the prevailing Party is entitled to his or her reasonable attorney's fees and costs. If District chooses to proceed under Clause (i) of this Section 6.3 and it is subsequently determined that District overpaid Architect, Architect shall refund to District the amount of such payment.

ARTICLE VII ARCHITECT'S RECORDS AND FILES

7.1. RECORDS

7.1.1. Maintenance of Project Books and Records. Architect and its Subconsultants shall maintain complete and accurate books and records with respect to services, costs, expenses, receipts and other information required by the District to verify the scope or charges for any services provided under this Agreement. Architect and its Subconsultants shall maintain such records in sufficient detail to permit the District, the District's independent auditors, or a designee of any of them, to thoroughly evaluate and verify the nature, scope, value and charges for services performed under this Agreement. All such books and records shall be maintained in accordance with generally accepted accounting principles and shall be clearly identified and readily accessible. Such records shall be kept separate from other documents and records unrelated to the Project for a period of four (4) years after the later of termination of this Agreement or Final Completion of the Project.

7.1.2. Audit of Records. The District, District's independent auditors, or their designees shall have the right to examine and to audit books, records, documents, and other evidence sufficient to reflect properly all costs and expenses claimed to have been incurred in Architect's and its Subconsultants' performance of this Agreement, including, without limitation, verification of the amounts and tasks performed for all time expended that is charged to the District on an hourly basis. Such right to audit shall include inspection at all reasonable times at the Architect's offices or facilities. In addition, Architect shall, at no cost or expense to the District, furnish facilities and cooperate fully with the audit. Upon request, Architect shall provide reproducible copies of books, records and other documents in the possession of Architect and its Subconsultants that are applicable to this Agreement for reproduction by the District, or their designee.

7.1.3. **Audit Reimbursement.** To the extent that an audit by the District, District's independent auditors, or their designees disclose excess charges inaccurately or improperly attributed to this Project by the Architect and such audit is subsequently determined to be correct, Architect agrees to remit the amount of the overpayment to the District, together with interest thereon at a rate that is the lesser of ten (10%) percent per annum or the maximum rate allowable by law, within thirty (30) Days after demand. If such audit discloses an overcharge of five (5%) percent or more of the total amount invoiced to the District for any year audited, and such audit is subsequently determined to be correct, Architect shall pay the actual cost of such audit, which cost, in the case of audits conducted by the District using in house staff, shall be computed on the basis of two (2) times the direct payroll of the audit staff completing the audit and audit report.

7.1.4. **Privileged Communications.** Architect acknowledges that in the course of its services under this Agreement it will be necessary for Architect or its Subconsultants to communicate with the District's attorneys, including special legal counsel, or receive or perform work at the request of District's counsel, and that such work product and communications shall be protected by the attorney-client and attorney work product privileges and shall be maintained in confidence by Architect and its Subconsultants, except as authorized in writing by District's counsel, or designee.

7.1.5. **Subconsultants.** Architect shall include the provisions of this Section 7.1 in all contracts it enters into with Subconsultants.

ARTICLE VIII TERM; TERMINATION OF AGREEMENT

8.1. TERM.

The Term of this Agreement shall commence upon the District and the Architect each executing a counterpart copy hereof, delivery of an executed counterpart copy hereof to the other and ratification of this agreement by the District's Board of Trustees ("Term"). This Agreement shall be in effect unless terminated prior thereto under the provisions of this Article 8. In the event that Project construction is not completed or the District shall not have issued Final Payment to the Contractor as of the Termination Date through no fault or neglect of Architect, or its Subconsultants, the Termination Date shall be extended and Basic Services provided by Architect following the Termination Date shall be in accordance with the Rate Schedule attached to the Project Authorization. If Project construction is not completed by the Termination Date and delayed completion of Project construction is caused in whole or in part by: (a) the acts, omissions or other conduct of the Architect or any Sub consultant; (b) delayed review and/or approval by DSA or other government authorities; or (c) acts of God, the Termination Date shall be extended commensurate with the number of calendar Days attributed to (a), (b), and/or (c) above ("the Extended Duration"). During the Extended Duration, the Architect shall continue to provide or perform the Basic Services without adjustment of the Compensation.

8.2. TERMINATION BY THE DISTRICT

8.2.1. For Cause. If the District determines that Architect has failed to perform in accordance with the terms and conditions of this Agreement, the District may terminate all or part of the Agreement (or of any Project) for cause. This termination shall be effective if Architect does not begin to cure its failure to perform within ten (10) Days (or longer, if authorized in writing by District) after receipt of a notice of intention to terminate from the District specifying the failure in performance. If a termination for cause does occur, the District will have the right to withhold monies otherwise payable to Architect to the extent caused by the Architect's cited failure to perform. If the District incurs additional costs, expenses or other damages due to the negligent failure of Architect to properly perform pursuant to this Agreement, these costs, expenses or other damages shall be deducted from the amounts withheld. Should the amounts withheld exceed the amounts deducted; the balance will be paid to Architect upon Final Completion of the Project. If the costs, expenses or other damages incurred by the District exceed the amounts withheld, Architect shall be liable to the District for the difference. The provisions of this Paragraph 8.2.1 are in addition to, and not a limitation upon, any other rights and remedies of the District under law or in equity.

8.2.2. For Convenience. The District may terminate or suspend performance of all or part of this Agreement (or of any Project) for convenience and without cause at any time upon ten (10) Days' written notice to Architect, in which case the District will pay Architect as provided in Article 5 for all Basic Services and authorized Additional Services performed, and all authorized Reimbursable Expenses incurred and paid (excepting any disputed amounts), under and in accordance with this Agreement up to and including the date of termination. Such payment shall be Architect's sole and exclusive compensation and the District shall have no liability to Architect for any other compensation or damages, including without limitation, anticipated profit, prospective losses or consequential damages, of any kind.

8.2.3. Deletion of Services. In the event of termination by the District, for cause or convenience, of a portion of the Project, then the Architect's fixed or maximum compensation for Basic Services for the portions of Project or services not so terminated shall be equitably adjusted to reflect the resulting reduction in Architect's scope of Basic Services.

8.3. TERMINATION BY ARCHITECT

8.3.1. Termination of the Agreement. Architect may terminate this Agreement:

(i) If the District fails to make any undisputed payment to Architect when due in accordance with this Agreement and such failure remains uncured for thirty (30) Days after written notice to the District of such default and of Architect's intent to terminate; or

(ii) If the Project is abandoned by the District for more than sixty (60) consecutive Days, Architect may terminate this Agreement upon thirty (30) Days' notice to the

District, provided the District does not reactivate the Project within such thirty (30) Day period. If the Project is reactivated and this Agreement is still in full force and effect, Architect's compensation and time for performance shall be equitably adjusted to provide for reasonable expenses incurred by Architect and delays which are directly attributable to the interruption and resumption of service.

8.3.2. Payment for Services. In the event of a termination of this Agreement by Architect in accordance with this Section 8.3, the District's obligation shall be to pay Architect an amount for its Basic Services, Additional Services, and Reimbursable Expenses calculated in accordance with Paragraph 8.2.2 of this Agreement. Such payment shall be Architect's sole and exclusive compensation and the District shall have no further liability or obligation to Architect for any other compensation or damages, including, without limitation, anticipated profit, prospective losses or consequential damages, of any kind.

ARTICLE IX INDEMNIFICATION AND INSURANCE

9.1. INDEMNIFICATION

To the fullest extent permitted by law, Architect agrees to defend, indemnify and hold harmless, the District, its Board of Trustees, and each of their respective members, officers, employees, agents, and volunteers ["Indemnitee(s)"], through legal counsel reasonably acceptable to the District, from any and all losses, liabilities, claims, damages and costs to the extent that the claims against Indemnitee(s) arise out of or are attributable, in whole or in part, to the negligence, recklessness, or willful acts or omissions of Architect or its Subconsultants, or their respective employees, agents, representatives or independent contractors. The Architect's obligation to pay the Indemnitees' reasonable attorneys' fees and costs shall be limited to the reimbursements for reasonable attorney fees and costs incurred by Indemnitees in defending actions after a final determination of and to the extent the claims arise out of, pertain to, or relate to the negligence, recklessness or willful misconduct of the Architect and/or its Subconsultants. The foregoing notwithstanding, the limitation to Architect's reimbursement of reasonable attorney fees and costs to the Indemnitees shall be governed by California Civil Code section 2778 or section 2782.8, which are incorporated herein by reference in their entirety. Further, the limitation to Architect's reimbursement of reasonable attorney fees and costs to the Indemnitees shall not act as a limitation of the Architect's obligation to provide services pursuant to Paragraph 3.1.15, above. The Architect's obligations hereunder shall survive the Architect's completion of services and obligations hereunder or the earlier termination of the Agreement until any such claim, demand, loss, responsibility or liability covered by the provisions hereof is barred by the applicable Statute of Limitations.

The Indemnitees shall be entitled to the defense and indemnification provided for hereunder except to the extent the loss, liability, claim, damage or cost is in part caused or contributed to by the acts or omissions of an Indemnitee; provided, however, that nothing contained herein shall be construed

as obligating Architect to indemnify any Indemnitee for any loss, liability, claim, damage or cost to the extent resulting from that Indemnitee's negligence or willful misconduct.

To the fullest extent permitted by law, the District agrees to defend, indemnify and hold harmless, the Architect, from any and all losses, liabilities, claims, damages and costs arising out of or attributable, in whole or in part, to the negligent or willful acts, omissions, errors and/or other conduct of the District, and those of the District's Trustees, officers, employees, agents and volunteers arising from the Project that is subject to this Agreement; provided, however, that nothing contained herein shall be construed as obligating the District to indemnify any Architect for any loss, liability, claim, damage, or cost to the extent resulting from that Architect's, or its Subconsultants', or their respective employees,' agents,' representatives' or independent contractors,' negligence or willful misconduct, omissions, errors and/or other conduct. The District's obligation to pay Architect's attorneys' fees and costs shall be limited to the reimbursements for attorney fees and costs incurred by the Architect in defending actions to the extent caused by the negligence, recklessness or the willful misconduct of the District.

9.2. INSURANCE

9.2.1. Basic Insurance Requirements. Prior to commencing Work, Architect and each of its Subconsultants shall procure and maintain insurance at Architect's and its Subconsultant's, as applicable, own cost and expense against claims for injuries to persons or damages to property which may arise from or in connection with the performance of services by Architect, its agents, representatives, employees, or Subconsultants. Contractor engaged for a Project referenced in this Agreement shall be responsible for obtaining and maintaining Builder's Risk insurance to remain in place throughout the construction phase.

(i) Without in any way affecting the indemnity provided in or by Section 9.1, Architect shall secure before commencement of the Work the types and amounts of insurance specified in this Section 9.2.

(ii) Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A- VII unless otherwise approved by the District.

(iii) Each insurance coverage required by this Section 9.2 shall be endorsed to state that coverage shall not be canceled except after thirty (30) Days prior written notice has been given to the District in accordance with the notice provisions of this Agreement.

9.2.2. Minimum Limits of Insurance. Architect and each of its Subconsultants (unless the District shall agree in writing for a different Limit of Insurance for certain Subconsultants) shall obtain insurance of the types and in the amounts described below:

(i) Commercial General Liability Insurance (CGL) with a limit of not less than \$1,000,000 each occurrence/\$2,000,000 in the annual aggregate.

(ii) Any Automobile Liability Insurance with a limit of not less than \$1,000,000 each accident.

(iii) Professional Liability (Errors and Omissions) Insurance with a limit not less than \$2,000,000 per claim/\$4,000,000 in the annual aggregate.

(iv) Workers' Compensation Insurance as required by the state of California.

(v) Employer's Liability Insurance in the amount of \$1,000,000 per accident for bodily injury or disease.

9.2.2.1.

Minimum Scope of Insurance.

(A) CGL insurance shall be written on Insurance Services Office form CG 00 01 (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal injury and advertising injury liability assumed under an insured contract (including the tort liability of another assumed in a business contract), and explosion, collapse and underground hazards.

(B) Business Automobile Insurance shall cover liability arising out of any automobiles (including owned (if any), hired and non-owned automobiles). Coverage shall be written on Insurance Services Office form CA 00 01, CA 00 05, CA 00 12, CA 00 20, or a substitute form providing equivalent liability coverage. Unless waived by the District in writing, the policy shall be endorsed to provide contractual liability coverage equivalent to that provided in the 1990 and later editions of CA 00 01.

(C) If the Professional Liability Insurance policy is written on a claims made basis, it shall be maintained continuously for a period of no less than three (3) years after Final Completion of the Project, and two (2) additional years if such coverage is available to Architect. The "retro date" must be shown and must be before the date of execution of this Agreement by the District and Architect.

9.2.3. Deductibles and Self-Insured Retentions. Any deductibles or self-insured retentions in excess of One Hundred Thousand dollars/no cents (\$100,000.00) must be declared to and approved by the District, which approval may be granted or withheld in the sole discretion to District. In the event that the District does not approve of such deductible or self-insured retentions, then at the option of the District, exercised in its sole discretion, either: (i) the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects District, its officers, officials, employees or volunteers; or (ii) Architect shall provide a financial guarantee satisfactory to the

District guaranteeing payment of any losses and related investigation, claim administration and defense expenses.

9.2.4. Other Insurance Provisions. The Commercial General Liability and Automobile Liability policies required by this Agreement are to contain, or be endorsed to contain, provisions equivalent to the following:

(i) The District, its officers, officials, employees, and volunteers are to be covered as additional insured with respect to: (i) liability arising out of automobiles owned, leased, hired or borrowed by or on behalf of the insured; (ii) liability arising out of work or operations performed by or on behalf of Architect and its Subconsultants including materials, parts or equipment furnished in connection with such services, work or operations; and (iii) liability for occurrences, acts or events covered by the Architect's CGL policy, using the Insurance Services Office additional insured endorsement form CG 20 10 or a substitute providing equivalent coverage. District and other additional insureds mentioned in this Paragraph 9.2.4.1 shall not, by reason of their inclusion as additional insured, become liable for any payment of premiums to carriers for such coverage.

(ii) For any claims related to this Project, insurance coverage shall be primary as it respects to the District, its officers, officials, employees and volunteers. Any insurance or self- insurance maintained by the District, its officers, officials, employees or volunteers shall be in excess of insurance required by this Agreement and shall not contribute with it.

9.2.5. Waiver of Subrogation. For Commercial General Liability, Workers' Compensation, and Employer's Liability insurance the insurer shall agree to waive all rights of subrogation against the District, its officers, officials, employees, and volunteers for and losses arising from activities and operations of an insured in the performance of services under this Agreement.

9.2.6. Lapse in Coverage. If Architect or any Sub consultant, for any reason, fails to maintain insurance coverage which is required pursuant to this Agreement, the same shall be deemed a material breach of this Agreement. The District, at its sole option, may terminate this Agreement and obtain damages from Architect resulting from said breach. Alternatively, the District may purchase such coverage (but has no obligation to do so), and without further notice to Architect, the District may deduct from sums due to Architect any premium costs advanced by the District for such insurance.

9.2.7. Verification of Insurance. Architect shall furnish the District with original certificates and amendatory endorsements effecting coverage required by this Section 9.2. The certificates for each policy are to be signed by a person authorized by the insurer to bind coverage on its behalf. The certificates and endorsements shall be on the District's forms or forms reasonably approved by the District or reasonably commercially available. All certificates and endorsements

are to be received and approved by the District before work under this Agreement commences. The District reserves the right to require complete copies of all required insurance policies at any time, including endorsements affecting the coverage required by these specifications. The District shall have the right to retain a copy of such policy provided that reasonable steps will be taken by the District to restrict review of such policies to representatives of the District.

9.2.8. Duration of Coverage. The insurance coverage required herein shall be maintained without interruption, for a period of three (3) years after Final Completion of the Work of the Project.

9.2.9. Subconsultants. Subconsultants shall be required by their sub consulting agreements to maintain insurance on the same terms and under the same coverage as required of Architect under this Agreement.

ARTICLE X DISPUTE RESOLUTION

10.1. RESOLUTION OF CLAIMS.

All claims, disputes or other matters in controversy between the Architect and the District arising out of or pertaining to the Project or this Agreement (hereinafter "Claims") shall be resolved by the Parties in accordance with the provisions of this Article 10, in lieu of any and all rights under the law that either Party may have to have its rights adjudged by a trial court or jury. All Claims shall be subject to the Claims Dispute Resolution Process set forth in this Article 10, which shall be the exclusive recourse of Architect and the District for determination and resolution of Claims.

10.2. RESOLUTION OF OTHER DISPUTES.

Disputes between the District and Architect that do not constitute Claims shall be resolved by way of an action filed in the Superior Court of the state of California, County Sacramento, and shall not be subject to the Claims Dispute Resolution Process.

10.3. CLAIMS DISPUTE RESOLUTION PROCESS

10.3.1. Continuation of Architect Services. Except in the event of the District's failure to make undisputed payment of the Compensation due Architect for the Project, notwithstanding any disputes between the District and Architect hereunder or in connection with the Project, Architect and the District shall each continue to perform their respective obligations hereunder; including the obligation of the Architect to continue to provide and perform services hereunder pending a subsequent resolution of such disputes.

10.3.2. Direct Negotiation. Designated representatives of the District and Architect shall meet as soon as possible (but not later than ten (10) Days after receipt of a written Claim) in

a good faith effort to negotiate a resolution to the Claim. Each Party shall be represented in such negotiations by an authorized representative with full knowledge of the details of the Claim or defenses being asserted by such Party, and with full authority to resolve such Claim then and there, subject only to the District's right and obligation to obtain Board of Trustees' approval of any agreed settlement or resolution. If the Claim involves an assertion of a right or claim by a Sub consultant against Architect that is in turn being asserted by Architect against the District, then such Subconsultant shall also have a representative attend such negotiations, with the same authority and knowledge as just described. Upon completion of the meeting, if the Claim is not resolved, the Parties may either continue the negotiations or either Party may declare negotiations ended. All discussions that occur during such negotiation and all documents prepared solely for the purpose of such negotiations shall be confidential and privileged pursuant to California Evidence Code sections 1119 and 1152.

10.3.3. Mandatory Mediation. If the Claim remains unresolved after direct negotiations, all claims, disputes and other matters in controversy between the Architect and the District arising out of or pertaining to this Agreement shall be submitted for resolution by non-binding mediation. The commencement and completion of mediation proceedings pursuant to the foregoing is a condition precedent to either the District or the Architect commencing arbitration proceedings pursuant to Paragraph 10.3.4 below.

10.3.4. Government Code Claim Requirements. Pursuant to Government Code section 930.6, any claim, demand, dispute, disagreement or other matter in controversy asserted by the Architect against the District for money or damages, including, without limitation, a Demand for Arbitration, shall be deemed a "suit for money or damages" and shall be subject to the provisions of Government Code sections 945.4, 945.6 and 946. Notwithstanding the resolution of disputes pursuant to the arbitration provisions set forth in this Paragraph 10.3.4, any claim, demand, dispute, disagreement or other matter in controversy between the Architect and the District shall first be presented to the District and acted upon or deemed rejected by the District in accordance with Government Code section 900, et seq., as an express jurisdictional condition precedent to the Architect's commencement of arbitration proceedings or litigation in any other forum.

10.3.5. Arbitration. All claims, disputes or other matters in controversy between Architect and the District arising out of or pertaining to this Agreement which are not fully resolved through the mandatory mediation set forth in Paragraph 10.3.3 above shall be settled and resolved by binding arbitration conducted under the auspices of the AAA Construction Industry Arbitration Rules in effect at the time of the filing of a Demand for Arbitration, as modified herein. The award rendered by the Arbitrator(s) shall be final and binding upon the District and the Contractor and shall be supported by law and substantial evidence pursuant to California Code of Civil Procedure section 1296. Any written arbitration award that does not include findings of fact and conclusions of law in conformity with California Code of Civil Procedure section 1296 and Rule R-47 of the AAA Construction Industry Arbitration Rules shall be invalid and unenforceable. The District and Contractor hereby expressly agree that the Court shall, subject to California Code of Civil Procedure sections 1286.4 and 1296, vacate the award if, after review of the award, the Court

determines either that the award is not supported by substantial evidence or that it is based on an error of law. In connection with any arbitration proceeding commenced hereunder, the discovery rights and procedures provided for in California Code of Civil Procedure section 1283.05, shall be applicable, and the same shall be deemed incorporated herein by this reference. If any claim or dispute is asserted by the Contractor, the Construction Manager or the District relating to the Project and arising in whole or in part out of this Agreement, the services provided by or through the Architect hereunder or the Instruments of Service prepared by or through the Architect, Architect and District agree that any arbitration proceedings initiated between Architect and District hereunder shall be consolidated with any arbitration proceedings initiated in connection with such other claim or dispute with the Architect, or the Contractor, the Construction Manager. Any arbitration hereunder shall be conducted in the AAA Regional Office closest to the Site.

ARTICLE XI MISCELLANEOUS

11.1. NON-DISCRIMINATION IN SERVICES

11.1.1. Architect shall not discriminate in the provision of services hereunder because of race, color, religion, national origin, ancestry, sex, age, sexual orientation, marital status, AIDS or disability in accordance with the requirements of Applicable Laws. For the purpose of this Section 11.1, discrimination in the provision of services may include, but is not limited to the following:

- (i) Denying any person any service or benefit or the availability of a facility.
- (ii) Providing any service or benefit to any person which is not equivalent, or in a non- equivalent manner or at a non-equivalent time, from that provided to others.
- (iii) Subjecting any person to segregation or separate treatment in any manner related to the receipt of any service.
- (iv) Restricting any person in any way in the enjoyment of any advantage or privilege enjoyed by others receiving any service or benefit.
- (v) Treating any person differently from others in determining admission, enrollment, eligibility, membership, or any other requirement or condition which persons must meet in order to be provided any service or benefit.

11.1.2. Architect shall ensure that intended beneficiaries of this Agreement are provided services without regard to race, color, religion, national origin, ancestry, sex, age, sexual orientation, marital status, AIDS or disability.

11.1.3. Architect shall establish and maintain written procedures under which any person, applying for or receiving services hereunder, may seek resolution from Architect of a complaint with respect to any alleged discrimination in the provisions of services by Architect's personnel. At any time, any person applies for services under this Agreement, he or she shall be advised by Architect of these procedures. A copy of such procedures shall be posted by Architect in a conspicuous place, available and open to the public, in each of Architect's facilities where services are provided hereunder.

11.2. NOTICE FORM AND DELIVERY

All notices, demands, or requests to be given under this Agreement shall be given in writing and conclusively shall be deemed received when received in any of the following ways:

- (i) on the date delivered if delivered personally;
- (ii) on the third (3rd) business Day after the deposit thereof in the United States mail, first class postage prepaid, and addressed as hereinafter provided; on the date it is accepted or rejected if sent by certified mail.
- (iii) by email if agreed upon by the Parties in writing.

11.3. Notice Recipients.

All notices, demands or requests shall include the Contract Number, Project name, and date of this Agreement, and shall be addressed to the Parties as follows:

If to District:

Oakland Unified School District
955 High Street, Oakland, CA 94601

If to Architect:

Gelfand Partners Architects
165 10th Street, Suite 100
Oakland, CA 94103

11.4. GOVERNING LAW; INTERPRETATION.

This Agreement shall be governed and interpreted in accordance with the laws of the state of California in accordance with its fair meaning and not strictly for or against the District or Architect.

11.5. NUISANCE.

Architect shall not maintain, commit or permit the maintenance or commission by its personnel of any nuisance in connection with the performance of services under this Agreement.

11.6. HAZARDOUS SUBSTANCES.

If Architect becomes aware that a Hazardous Substance is on Site, or on a campus related to the Project that has not been previously identified as requiring remediation or other action, the Architect shall immediately notify the District in writing describing in detail the conditions encountered. Architect's obligation hereunder shall be limited to reporting Hazardous Substances of which Architect or its Subconsultants acquire actual knowledge. Architect shall not have an affirmative duty to identify or locate any Hazardous Substance.

11.7. WAIVER.

Provisions of this Agreement may be waived by the District only in writing and signed by the Superintendent or designee stating expressly that it is intended as a waiver of specified provisions of this Agreement. A waiver by either Party to this Agreement of any breach of any term, covenant, or condition contained herein shall not be deemed to be a waiver of any subsequent breach of the same or any other term, covenant, or condition contained herein whether of the same or a different character.

11.8. NO THIRD PARTY RIGHTS.

Except for the indemnity and insurance requirements of Article 9 herein, nothing contained in this Agreement is intended to make any person or entity who is not a signatory to this Agreement a third party beneficiary of any right, obligation or cause of action created by this Agreement, by operation of law, or conduct of the Parties.

11.9. CUMULATIVE RIGHTS; NO WAIVER.

Duties and obligations imposed by this Agreement and rights and obligations hereunder are in addition to and not in lieu of any imposed by or available at law or in equity. No action or failure to act by the District or Architect hereunder shall be deemed a waiver of any right or remedy afforded hereunder or acquiesce or approval of any breach or default by the other.

11.10. ENTIRE AGREEMENT.

This Agreement represents the entire Agreement with the District and Architect for furnishing of services to the Project and supersedes all prior negotiations, representations or agreements, either written or oral, and may be amended only by written instrument signed by both the District and Architect, and formally approved or ratified by the Board of Trustees.

11.11. SEVERABILITY.

In case any provision of this Agreement is held to be invalid, illegal or unenforceable, the validity, legality and enforceability of all remaining provisions shall not be affected.

11.12. SUCCESSORS AND ASSIGNS.

This Agreement shall be binding upon the District and Architect and their respective successors and assigns. Neither the performance of this Agreement nor any part thereof, nor any monies due or to become due hereunder, nor any claim hereunder, may be assigned by Architect without the prior written consent and approval of District, which may be granted or withheld in District's sole discretion.

11.13. CONFIDENTIALITY.

Architect shall treat all confidential information and data identified as confidential and furnished to it by the District or any other Project Team member or otherwise obtained or prepared by Architect concerning the Project as strictly confidential and shall not disclose any of the same to any other person or entity unless required to do so in connection with Architect's performance of this Agreement or any governmental filings or applications. The foregoing obligations shall not prevent Architect from disclosing only those portions of confidential information that are required to be disclosed by law, government regulation, rule, ethical obligation, subpoena or court order, provided that Architect provides reasonable prior notice to the District of such required disclosure and takes reasonable lawful measures to avoid or minimize such disclosure, including providing reasonable assistance to District with respect to any appropriate action that District may decide to take. Architect shall not engage in or permit any public references or statements to the Project, the District or Architect's services hereunder, including, without limitation, referring to the same in advertising or promotional brochures or materials or granting interviews to broadcast, print or other media, without the prior written consent of the District, which may be granted or withheld in the sole discretion of the District. The provisions of this Article 11.13 shall survive any termination of this Agreement.

11.14. INDEPENDENT CONTRACTOR.

Architect is and shall at all times remain as to the District a wholly independent contractor. Neither the District nor any of its agents shall have control over the conduct of Architect or any of Architect's officers, agents or employees, except as herein set forth. Architect shall not, at any time, or in any manner, represent that it or any of its agents or employees are in any manner agents or employees of the District.

11.15. FAIR EMPLOYMENT PRACTICES/EQUAL OPPORTUNITY ACTS.

In the performance of this Agreement, Architect shall comply with all applicable provisions of the California Fair Employment Practices Act (Government Code, §§ 12940-48) and the applicable equal employment provisions of the Civil Rights Act of 1964 (42 U.S. C. 200e -217), whichever is more restrictive.

11.16. PERMITS AND LICENSES.

Architect, at its sole expense, shall obtain and maintain during the term of this Agreement, all required business and professional permits, licenses and certificates necessary for Architect to perform its services.

11.17. CONFLICTS OF INTEREST.

Architect agrees not to accept any employment or representation during the term of this Agreement which is or may likely make Architect “financially interested” (as provided in Gov. Code, §§ 1090 and 87100) in any decision made by the District on any matter in connection with which Architect has been retained pursuant to this Agreement.

11.18. MARGINAL HEADINGS; CAPTIONS. MARGINAL HEADINGS; CAPTIONS.

The titles of the various Paragraphs of this Agreement are for convenience of reference only and are not intended to and shall in no way enlarge or diminish the rights or obligations of Architect and the District hereunder.

11.19. EXHIBITS.

The following Exhibits are attached hereto and incorporated herein by this reference

Exhibit “A” - Sample Project Authorization

Exhibit “B” - Certification Re Financial Relationship Disclosure (Architect)

Exhibit “C” – Iran Contracting Certification

11.20. DEFINITIONS

11.20.1. **Acceptance.** The point that the Work is accepted by the Board of Trustees. Acceptance shall not constitute evidence or confirmation of Substantial Completion or Final Completion if in fact the Work is not Substantially Complete or Finally Complete on the date of such Acceptance.

11.20.2. **Addendum, Addenda.** Written or graphic information (including, without limitation, Drawings or Specifications) prepared and issued prior to the receipt of the Contractor's Bid for the Project, which modify or interpret the Bid Documents by additions, deletions, clarifications or corrections.

11.20.3. **Applicable Laws.** All applicable federal, state and municipal laws, statutes, building codes, ordinances and regulations of Governmental Authorities having

jurisdiction over the Project, Work, Site, the District, Architect, including, without limitation, Environmental Laws, and all ordinances, rules and regulations enacted by the District.

11.20.4. **As-Built.** The documents prepared by Contractor, and subject to review and reasonable verification and approval by Architect, showing the condition of the Work of the Project as actually built, including, without limitation, the locations of mechanical, electrical, plumbing, HVAC or similar portions of the Work that are shown diagrammatically in the Contract Documents.

11.20.5. **Bid Documents.** The collection of documents prepared and issued for the purpose of soliciting Bids or proposals for construction of Work.

11.20.6. **Change Order.** A written instrument signed in accordance with the requirements of the General Conditions of a construction contract, describing an adjustment in the Contract Sum or Contract Time, or both. The term “Change Order” encompasses both mutually executed and unilaterally issued Change Orders.

11.20.7. **Construction Contract.** A written contract executed between the District and Contractor for construction of a portion or all of the Work of the Project or a collection of Projects.

11.20.8. **Construction Costs.** The total costs to construct those elements of the Project designed or specified by Architect. Construction Costs do not include any of the following: (i) the cost of professional services to be rendered by Architect, Subconsultants, Specialty Consultants, Construction Manager; (ii) land acquisition costs; (iii) finance costs; (iv) District’s administrative costs; and (v) legal fees and costs.

11.20.9. **Contract Documents.** Without limitation, the collection of documents that are to be the Contract Documents governing a Contractor’s performance of the Work of the Project.

11.20.10. **Contract Time.** The total number of Days set forth in a Construction Contract within which Substantial and/or Final Completion of the Work of the Project must be achieved by Contractor, including approved extensions of time permitted under the terms of the Contract Documents.

11.20.11. **Contractor.** An individual or firm under contract with the District to serve as the general contractor for construction of all or a portion of the Work of the Project; may also be referred to as “Separate Contractor” where multiple trade contracts will be utilized for the completion of the Project.

11.20.12. **Day.** Whether capitalized or not, unless otherwise specifically provided, means calendar Day, including weekends and legal holidays.

11.20.13. **Defective Work.** Work by a Contractor that is unsatisfactory, faulty, omitted, incomplete, deficient or does not conform to Applicable Laws, the Contract Documents, the directives of the District, Architect or the Project Inspector or the requirements of any inspection, reference standard, test, code or approval specified in the Contract Documents.

11.20.14. **Delay.** Whether capitalized or not, includes any circumstances involving disruption, hindrance or interference in the performance of the Work of the Project.

11.20.15. **Design and Construction Project Team.** The following Project Team members: District, Project Inspectors, Contractors, Subcontractors, Architects, Subconsultants, Specialty Consultants and Separate Contractors.

11.20.16. **Design Costs.** The costs to the District for conceptual, schematic, design development, construction documents and construction administration services required for completed design, engineering, administration and management by Architect and Specialty Consultants.

11.20.17. **Design Documents.** All plans, drawings, tracings, specifications, programs, reports, calculations, models and other material containing designs, specifications or engineering information prepared by Architect and Specialty Consultants including, without limitation, computer aided design materials, electronic data files, files and paper copies.

11.20.18. **Drawings.** The graphic and pictorial portions of the Contract Documents prepared by Architect and other Specialty Consultants showing the design, location and dimensions of the Work, including plans, elevations, details, schedules and diagrams. The term “Drawings” may be used interchangeably with “Plans.”

11.20.19. **Environmental Laws.** Without limitation, any applicable federal, state or local laws, ordinances or regulations relating to the environment, health and safety, Hazardous Substances (including, without limitation, the use, handling, transportation, production, disposal, discharge or storage thereof) or to industrial hygiene or the environmental conditions on, under or about the Site, including, without limitation, soil, groundwater and indoor and ambient air conditions, including, without limitation, the following: Comprehensive Environmental Response, Compensation and Liability Act of 1980, as amended (42 U.S.C. §§ 9601-9675), the Resource Conservation and Recovery Act, as amended (42 U.S.C. §§ 6901-6992k), the Hazardous Materials Transportation Act, as amended (49 U.S.C. § 1801 et seq.), the Federal Water Pollution Control Act, as amended (33 U.S.C. §§ 1251-1307), the Clean Air Act, as amended (42 U.S.C. §§ 7401-7671 et seq.), the Toxic Substances Control Act, as amended (15 U.S.C. §§ 2601-2692), the Residential Lead- Based Paint Hazard Reduction Act of 1992 (Title X), 15 U.S.C. §§ 2681-2692 and also 42 U.S.C. §§ 4851-4856, the Lead Based Paint Poisoning Prevention Act, 42 U.S.C. §§ 4821-4846, the Indoor Radon Abatement Act, 15 U.S.C. §§ 2661-2671, and the Safe Drinking Water Act Amendments of 1996, Pub L. No. 104-182, 110 Stat. 1613 (1996) and all similar federal, state, and local statutes and regulations.

11.20.20. **ENR Index.** The construction cost index as published in the Engineering News-Record by the McGraw-Hill Publishing Company or its successors.

11.20.21. **Estimate of Project Construction Costs.** Architect's written estimate of the Construction Costs for the Project.

11.20.22. **Field Order.** A written instrument signed in accordance with the requirements of the General Conditions that directs a Contractor's performance of Work in one of the following categories: (i) over which there is a dispute as to whether the Work is or is not extra work; or (ii) involving extra work which is to be performed without adjustment to the Contract Sum or Contract Time or before agreement on all terms of a Change Order.

11.20.23. **Final Completion, Finally Complete.** The terms "Final Completion" and "Finally Complete" refer, with respect to the Work of the Project or a portion of the Work designated by the District, to the point at which: (i) the entirety of such Work is fully completed, including all minor corrective, or "punch list," items; (ii) all documents required to be submitted by Contractor as a condition of Substantial or Final Completion of such Work have been submitted, (including, without limitation, warranties, guarantees and other Record Documents); (iii) the entirety of such Work and related areas of the Site have been thoroughly cleared of all construction debris and cleaned in accordance with the requirements of the Contract Documents, including, but not necessarily limited to, the following: removal of temporary protections; removal of marks, stains, fingerprints and other soil and dirt from painted, decorated and natural-finished woodwork and other Work; removal of spots, plaster, soil and paint from ceramic tile, marble and other finished materials; all surfaces, fixtures, cabinet work and equipment are wiped and washed clean and in an undamaged, new condition; all aluminum and other metal surfaces are cleaned in accordance with recommendations of the manufacturer; and all stone, tile and resilient floors are cleaned thoroughly in accordance with manufacturer's recommendations and buff dried by machine to bring the surfaces to sheen; and (iv) all conditions set forth in the Contract Documents for Substantial and Final Completion of such Work have been, and continue to be, fully satisfied.

11.20.24. **Hazardous Substance.** The term "Hazardous Substance" refers to, without limitation, the following: (i) any chemical, material or other substance defined as or included within the definition of "hazardous substances," "hazardous wastes," "extremely hazardous substances," "toxic substances," "toxic material," "restricted hazardous waste," "special waste" or words of similar import under any Environmental Law, including, without limitation, the following: petroleum (including crude oil or any fraction thereof), asbestos, asbestos-containing materials, polychlorinated biphenyls ("PCBs") and PCB-containing materials, whether or not occurring naturally; or (ii) any substance that because of its quantity, concentration or physical or chemical characteristics poses a significant present or potential hazard to human health and safety or to the environment, and which has been determined by any Governmental Authority to be a hazardous waste or hazardous substance.

11.20.25. **Project Inspector.** A Division of State Architect certified inspector for the Project pursuant to the Field Act (Ed. Code, § 81130.3, et seq.) and California Code of Regulations.

11.20.26. **Key Personnel.** Those individuals listed in the Project Authorization, and any additions or replacements thereto whose personal performance of services is considered of the essence to the Project.

11.20.27. **Plans.** The graphic and pictorial portions of the Contract Documents prepared by Architect and its Specialty Consultants showing the design, location and dimensions of the Work, including drawings, elevations, details, schedules and diagrams. The term “Plans” may be used interchangeably with “Drawings.”

11.20.28. **Project Budget.** The District’s written statement of funds available to pay for Project Costs, as developed by District.

11.20.29. **Project Construction Budget.** That portion of a Project Budget that sets forth the District’s budget for Construction Costs.

11.20.30. **Project Costs.** The total of all Design Costs, Construction Costs, Specialty Consultants Costs, and other Project-related costs (such as, but not limited to, personnel relocation and temporary facilities costs, fixtures, furniture and equipment (if required)). Project Costs do not include: (i) land acquisition costs; (ii) finance costs; (iii) District administrative costs; or (iv) legal fees and court costs.

11.20.31. **Project Schedule.** A detailed schedule prepared by Architect pursuant to Paragraph 2.1.4 of this Agreement depicting in detail the Architect’s proposed schedule for performance of its Basic Services.

11.20.32. **Schedule of Values.** A detailed, itemized breakdown of the Construction Contract Sum, which provides for a fair and reasonable allocation of the dollar values to each of the various parts of the Work of the Project.

11.20.33. **Sub consultant.** A person or firm that has a contract with Architect to perform a portion of the services covered by this Agreement.

11.20.34. **Submittal.** Shop drawings, detailed designs, samples, exemplars, product data, fabrication and installation drawings, lists, graphs, operating instructions, and other similar documents required to be submitted by a Contractor under the Contract Documents.

11.20.35. **Substantial Completion, Substantially Complete.** The terms “Substantial Completion” and “Substantially Complete” refer to the point at which the Work of the Project, or any portion thereof designated by the District, is: (i) sufficiently and entirely

complete in accordance with Contract Documents so that such Work can be fully enjoyed and beneficially occupied and utilized for its intended purpose (except for minor items which do not impair the ability to so occupy and use such Work); (ii) receipt by the District of all permits and certificates (such as, but not necessarily limited to, a certificate of occupancy) required to occupy and use the Project; and (iii) all systems included in the Work of the Project are operational as designed and scheduled, all designated or required governmental inspections and certifications have been made and posted and instruction of District's personnel in the operation of the systems has been completed.

11.20.36. **Sustainable Building Guidelines.** Guidelines for sustainable building principles, standards and processes, and related design procedures, criteria and standards developed for the District as set forth in the Program Design Standards.

11.20.37. **Work.** All labor, materials, equipment, services, permits, licenses and taxes and all other things necessary for a Contractor to perform its obligations under the Contract Documents, including, without limitation, any changes, additions or deletions requested by District, in accordance with the Contract Documents and all Applicable Laws. The Work may constitute the whole or a part of the Project or the Project.

11.21. APPLICATION OF DEFINITIONS

Definitions of terms that are phrased in the singular shall be deemed to include the plural, and vice versa, where appropriate to the context or circumstances.

[SIGNATURES ON FOLLOWING PAGE]

IN WITNESS WHEREOF, the Parties hereto have made and executed this Agreement, on the Day and year first above written.

OAKLAND UNIFIED SCHOOL DISTRICT

Jennifer Brouhard, President,
Board of Education

Date

Kyla Johnson-Trammell, Superintendent
and Secretary, Board of Education

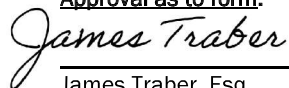
Date



~~Preston Thomas (May 28, 2025 10:21 PDT)~~
Preston Thomas, Chief Systems &
Services Officer

Date

Approval as to form:



James Traber, Esq.
Facilities Counsel

05/27/2025

Date

GELFAND PARTNERS ARCHITECTS

May 23, 2025

Contractor Signature

Date

Lawrence Schadt, Principal

Print Name, Title

Exhibit "A"
SAMPLE PROJECT AUTHORIZATION

PROJECT ASSIGNMENT
(EXHIBIT A TO AGREEMENT FOR ARCHITECTURAL SERVICES)

This Project Assignment is executed between Oakland Unified School District ("District") and _____ ("Architect") pursuant to the Master Agreement for Architectural Services ("Agreement") between the Architect and the District dated _____, 20____. By this reference, the Agreement is incorporated herein as if set forth in full.

1. Description of Work To Be Performed By Architect

[[Insert detailed description of Construction Project, and/or other services to be provided by Architect]]

2. Project Budget (District's written statement of funds available to pay for all Project Costs) _____ Dollars (\$_____)

3. Basic Services. The Architect will provide the following Basic Services noted below for the above-described Project.

Basic Services Phases

- ☐ Pre-schematic Programming
- ☐ Schematic Design
- ☐ Design Development
 - ☐ Preliminary Plans Value Engineering
 - ☐ Preliminary Plans Phase Constructability Review
- ☐ Construction Documents
 - ☐ Construction Drawings Value Engineering
 - ☐ Construction Drawings Constructability Review
- ☐ Bidding
- ☐ Construction
- ☐ Post-Construction

Sub-consultants Included in Basic Services

- ☐ Structural
- ☐ Civil
 - ☐ On-Site
 - ☐ Off-Site
- ☐ Mechanical
- ☐ Plumbing
- ☐ Electrical
- ☐ Telecommunications/Data
- ☐ Landscaping
- ☐ Furniture design
- ☐ Other: _____

Basic Services Submittal Schedule:

	START DATE	FINISH DATE
Pre-Schematic Programming Phase		
Schematic Design Phase		
Initial Design Development Phase		
Final Design Development Phase		
Preliminary Plans Value Engineering; Constructability Review	Value Engineering: _____ Constructability Review: _____	Value Engineering: _____ Constructability Review: _____
Initial Construction Documents Phase		
Final Construction Documents Phase		
Construction Drawings Value Engineering; Constructability Review	Value Engineering: _____ Constructability Review: _____	Value Engineering: _____ Constructability Review: _____
Bidding		
Construction		
Post-Construction		

4. Architect Compensation:

A. Payment Method:

☐ **Method A: Percentage of Computed Cost for New Construction and Additions**

Architect shall provide all the services identified as Basic Services as indicated above using the following fee schedule. To determine the Architect's Fee using this method, the computed cost of the project shall be multiplied by the applicable percentages below. The term "computed cost" is equal to the bid amount or Guaranteed Maximum Price plus any additive alternates not taken plus any change orders for additional scope of work.

- a. Nine (9%) percent of the first five hundred thousand dollars (\$500,000) of computed cost;
- b. Eight and one-half (8 ½ %) percent of the next five hundred thousand dollars

- (\$500,000) of computed cost;
- c. Eight (8%) percent of the next One Million Dollars (\$1,000,000) of computed cost;
 - d. Seven (7%) percent of the next Four Million Dollars (\$4,000,000) of computed cost;
 - e. Six (6%) percent of the next Four Million Dollars (\$4,000,000) of computed cost;
 - f. Five (5%) percent of the computed cost in excess of (\$10,000,000).

Factory Built Portables. Four (4%) percent of the first Thirty-Five thousand Dollars \$35,000) of the cost of factory built portables (Building cost only, all non-building costs and building costs beyond Thirty-Five Thousand Dollars shall be calculated per items a-f above).

(Reuse of Plans) Compensation for Re-use of Plans for new construction and addition projects shall be reduced from the full fee calculation to reflect savings due to re-use of existing documents as follows:

- a. 35% fee reduction for buildings only during Schematic Design Phase.
- b. 35% fee reduction for buildings only during Design Development Phase.
- c. 35% fee reduction for buildings only during Construction Document Phase.
- d. All other fees for buildings (DSA approval, Bidding and Construction Administration) shall be full fee.
- e. All fees related to the site development work shall be full fee.
- f. Design and engineering modifications due to program changes as required by the District, or code changes enacted subsequent to original plan approval, shall be billed as additional services or Re-use Fee reduction shall be adjusted to a mutually agreeable percentage to account for such changes.

Timeline of Payments under Method A

<u>Schematic Design (100% Completion):</u>	10% of Architect Fee
<u>Design Development (100% Completion):</u>	15% of Architect Fee
<u>Construction Documents (90% Completion):</u>	40% of Architect Fee, to be paid monthly based on actual level of completion.
<u>DSA Approval of Construction Drawings:</u>	5% of estimated Architect Fee
<u>Procurement Phase:</u>	5% of estimated Architect Fee as set forth on Attachment "A", when procurement is completed
<u>Construction Administration:</u>	25% of estimated Architect Fee, to be paid as follows: Procurement complete: 5% Construction 25% complete: 4% Construction 50% complete: 4% Construction 75% complete: 5% Construction 100% complete: 5% Submittal of final records: 2%

- ☐ Method B: Percentage of Computed Cost for Modernization, Renovation & Rehabilitation:
- a. Twelve (12%) percent of the first five hundred thousand dollars (\$500,000) of computed cost;
 - b. Eleven and one-half (11 ½ %) percent of the next five hundred thousand dollars (\$500,000) of computed cost;
 - c. Eleven (11%) percent of the next One Million Dollars (\$1,000,000) of computed cost;
 - d. Ten (10%) percent of the next Four Million Dollars (\$4,000,000) of computed cost;
 - e. Nine (9%) percent of the next Four Million Dollars (\$4,000,000) of computed cost;
 - f. Eight (8%) percent of the computed cost in excess of (\$10,000,000).

Billing shall proceed on the same timeline as payments for Method A.

☐ **Method C Stipulated Sum:** The Parties agree to a Stipulated Sum for all basic services and sub-consultants included in basic services. Billing shall proceed on the same timeline as payments for Method A [*or include other payment timeline*].

☐ **Method D - Hourly Billing Rates:** Compensation for services rendered by principals and employees shall be based upon the rates as stated on the Design Consultant's Hourly Rate schedule which shall be attached hereto. The rates shall remain the same for the duration of each project. The total cost for the work shall not exceed [*insert not to exceed figure if desired*].

C. Additional Provisions

1. Architect shall receive one hundred and ten (110%) percent of all Reimbursable Expenses, expressly authorized in advance by the District in writing, except as specifically excluded, incurred by the Architect, the Architect's employees, and consultants in the interest of the Project.
2. If specialty consultants are required who are not included as part of Basic Services, then the District shall reimburse the Architect one hundred and ten (110%) percent of their actual cost.
3. If any portions of the Project are deleted or otherwise not constructed, compensation for those portions of the Project shall be payable to the extent services are performed on those portions.
4. Architect shall receive reimbursement at cost for:
 - a. Reproduction of drawings and specifications in excess of the copies provided by this Agreement.
 - b. Architect shall receive reimbursement at cost for fees advanced for securing approval of authorities having jurisdiction over the Project.

[Signature Page Follows]

OAKLAND UNIFIED SCHOOL DISTRICT

Jennifer Brouhard, President,
Board of Education

Date

Kyla Johnson-Trammell, Superintendent
and Secretary, Board of Education

Date

Preston Thomas, Chief Systems &
Services Officer


Date

Approval as to form:

James Traber, Esq.
Facilities Counsel

Date

GELFAND PARTNERS ARCHITECTS



Contractor Signature

May 23, 2025

Date

Lawrence Schadt, Principal

Print Name, Title

EXHIBIT “B”

**CERTIFICATION REGARDING FINANCIAL RELATIONSHIP DISCLOSURE
(Public Contract Code section 3006 subdivision (b))**

I, [Name], [Name of Employer], certify that I have not offered, given, or agreed to give, received, accepted, or agreed to accept, any gift, contribution, or any financial incentive whatsoever to or from any person in connection with the roof project contract. As used in this certification, “person” means any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Furthermore, I, [Name], [Name of Employer], , certify that I do not have, and throughout the duration of the contract, I will not have, any financial relationship in connection with the performance of this contract with any architect, engineer, roofing consultant, materials manufacturer, distributor, or vendor that is not disclosed below.

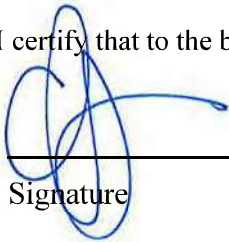
I, [Name], [Name of Employer], , have the following financial relationships with an architect, engineer, roofing consultant, materials manufacturer, distributor, or vendor, or other person in connection with the following roof project contract:

Name and Address of Building, Contract Date and Number

Name and Address of Building, Contract Date and Number

Name and Address of Building, Contract Date and Number

I certify that to the best of my knowledge, the contents of this disclosure are true, or are believed to be true.



Signature

May 23, 2025

Date

Lawrence Schadt, Principal

Print Name

Gelfand Partners Architects

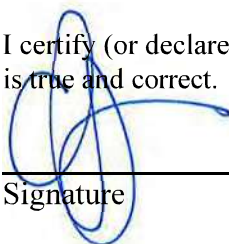
Print Name of Employer

EXHIBIT "C"
IRAN CONTRACTING CERTIFICATION

As required by California Public Contract Code section 2204, the Bidder certifies subject to penalty for perjury that the option checked below relating to the Bidder's status in regard to the Iran Contracting Act of 2010 (Pub. Contract Code, § 2200 et seq.) is true and correct:

- ☐ The Bidder is not:
- (i) identified on the current list of persons and entities engaging in investment activities in Iran prepared by the California Department of General Services in accordance with subdivision (b) of Public Contract Code section 2203; or
 - (ii) a financial institution that extends, for forty-five (45) days or more, credit in the amount of \$20,000,000 or more to any other person or entity identified on the current list of persons and entities engaging in investment activities in Iran prepared by the California Department of General Services in accordance with subdivision (b) of Public Contract Code section 2203, if that person or entity uses or will use the credit to provide goods or services in the energy sector in Iran.
- ☐ The District has exempted the Contractor from the requirements of the Iran Contracting Act of 2010 after making a public finding that, absent the exemption, Agency will be unable to obtain the goods and/or services to be provided pursuant to the Contract.
- ☐ The amount of the Contract payable to the Contractor for the Project does not exceed \$1,000,000.

I certify (or declare) under penalty of perjury under the laws of the state of California that the foregoing is true and correct.

 _____ Signature	May 23, 2025 _____ Date
Lawrence Schadt _____ Name	Principal _____ Title
Gelfand Partners Architects _____ Name of Firm	



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

5/23/2025

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 AssuredPartners Design Professionals Insurance Services, LLC 3697 Mt. Diablo Blvd Suite 230 Lafayette CA 94549	CONTACT NAME: Anni Owens PHONE (A/C, No, Ext): 510-272-1465 FAX (A/C, No): E-MAIL ADDRESS: CertsDesignPro@AssuredPartners.com														
License#: 6003745 GELFAR-01	<table><tr><th>INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr><tr><td>INSURER A : Aspen American Insurance Company</td><td>43460</td></tr><tr><td>INSURER B : Travelers Property Casualty Company of America</td><td>25674</td></tr><tr><td>INSURER C : The Travelers Indemnity Company of Connecticut</td><td>25682</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></table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Aspen American Insurance Company	43460	INSURER B : Travelers Property Casualty Company of America	25674	INSURER C : The Travelers Indemnity Company of Connecticut	25682	INSURER D :		INSURER E :		INSURER F :	
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INSURER D :															
INSURER E :															
INSURER F :															
INSURED Gelfand Partners Architects 165 Tenth Street, Suite 100 San Francisco CA 94103															

COVERAGES

CERTIFICATE NUMBER: 1226127606

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 INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
B	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Contractual Liab <input type="checkbox"/> Included GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:	Y	Y	6806S421239	8/1/2024	8/1/2025	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 \$
C	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY <input checked="" type="checkbox"/> NoOwned Auto	Y	Y	BA6S423614	8/1/2024	8/1/2025	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<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 checked="" type="checkbox"/> RETENTION \$ 0	Y	Y	CUP6S425484	8/1/2024	8/1/2025	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	Y	UB6S422979	8/1/2024	8/1/2025	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Professional Liability			AAAE10000706	8/1/2024	8/1/2025	Per Claim \$2,000,000 Aggregate Limit \$4,000,000

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

Insured owns no company vehicles; therefore, hired/non-owned auto is the maximum coverage that applies. The following policies are included in the underlying schedule of insurance for umbrella/excess liability: General Liability/Auto Liability/Employers Liability.
RE: All Operations of the Named Insured.

CERTIFICATE HOLDER**CANCELLATION** 30 Day Notice of Cancellation

Oakland Unified School District Facilities Planning & Mgmt. 955 High Street Oakland CA 94601	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
---	---

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THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

ADDITIONAL INSURED – OWNERS, LESSEES OR CONTRACTORS – SCHEDULED PERSON OR ORGANIZATION

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE

Names of Additional Insured Person(s) or Organization(s):

Any person or organization that you agree in a written contract to include as an additional insured on this Coverage Part, provided that such written contract was signed by you before, and is in effect when, the "bodily injury" or "property damage" occurs or the "personal injury" or "advertising injury" offense is committed.

Location of Covered Operations:

Any project to which a written contract with the Additional Insured Person(s) or Organization(s) in the Schedule applies.

(Information required to complete this Schedule, if not shown above, will be shown in the Declarations.)

A. Section II – Who Is An Insured is amended to include as an additional insured the person(s) or organization(s) shown in the Schedule, but only with respect to liability for "bodily injury", "property damage", "personal injury" or "advertising injury" caused, in whole or in part, by:

1. Your acts or omissions; or
2. The acts or omissions of those acting on your behalf;

in the performance of your ongoing operations for the additional insured(s) at the location(s) designated above.

B. With respect to the insurance afforded to these additional insureds, the following additional exclusions apply:

This insurance does not apply to "bodily injury" or "property damage" occurring, or "personal injury" or "advertising injury" arising out of an offense committed, after:

1. All work, including materials, parts or equipment furnished in connection with such work, on the project (other than service, maintenance or repairs) to be performed by or on behalf of the additional insured(s) at the location of the covered operations has been completed; or
2. That portion of "your work" out of which the injury or damage arises has been put to its intended use by any person or organization other than another contractor or subcontractor engaged in performing operations for a principal as a part of the same project.

CG D3 61 03 05

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DATE OF ISSUE: 06/17/2024

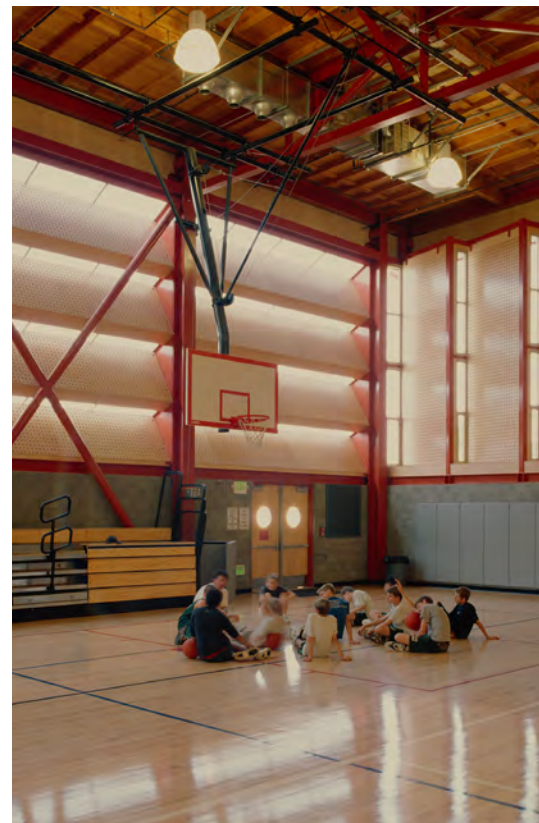
Page 1 of 1

Oakland Unified School District

Department of Facilities Planning & Management

RFQ For Architectural Services #25040

STATEMENT OF QUALIFICATIONS - ARCHITECTURAL SERVICES
Projects with a Construction Budget under \$10M at Various School Sites



GELFAND PARTNERS ARCHITECTS
165 10TH STREET, SUITE 100
SAN FRANCISCO, CA 94103
(415) 346 4040 | MAIL@GELFAND-PARTNERS.COM





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2.1. LETTER OF INTEREST

May 8, 2025

Dear Kenya Chatman,

Gelfand Partners Architects greatly appreciates the opportunity to collaborate with you, your District and the Oakland community on upcoming projects under \$10M at various school sites in this pre-qualification for Architectural services.

The Oakland Unified School District's mission to build a Full Service Community District focused on high academic achievement while serving the whole child, eliminating inequities, and providing each child with excellent teachers, every day, perfectly aligns with our expertise and passion in shaping campuses that promote interactive and personalized learning opportunities, and support students' growth through collaboration and community involvement. **Our approach to school designs emphasizes the learning process** by providing educators with well-lit stimulating classrooms and multi-functional facilities which serve students beyond school hours, allowing community members involvement to maximize the positive impact of a District's program on the broader community. An integral part of our design process is community outreach.

Gelfand Partners, a full service San Francisco design firm founded in 1997, has been in operation for 26 years. We are a California Small Corporation, SF LBE, as well as a Benefit Corporation, with four licensed architects and six other design staff. Gelfand Partners also self-performs landscape architecture and interiors when appropriate, with an extensive portfolio of rehab and TI projects. Our Team, including consultants, brings forth experience working both in your community and together in an integrated design process that ensures a best-value solution. We value shared collaborative spirit, rigor of the process and an established reputation of success in the Team we propose, to partner with you and your District.

Gelfand Partners has worked throughout the Bay Area and specifically with OUSD in advancing the design of schools, colleges, affordable housing and civic facilities and extends the benefits of community engagement in alignment with your District's commitment to maximize positive outcomes for all. Through imagination, responsive design and inclusivity, our practice stimulates a healthy future for new generations while reinforcing the strengths of mature communities. Gelfand Partners has a successful track record in collaborating with school Districts in providing healthy and aspirational environments with lower operating costs, and the spatial efficiencies and flexibility that defines the 21st century school.

ATTN

Kenya Chatman
Executive Director of Facilities
Dep. of Facilities Planning &
Management
Oakland Unified School District
955 High Street
Oakland, CA 95601

INFO & CONTACTS

Gelfand Partners Architects
165 10th Street, Suite 100
San Francisco, CA 94103
Tel. & Fax 415.346.4040
mail@gelfand-partners.com
www.gelfand-partners.com

Main point of contact
and authorized official:
Larry Schadt
larry@gelfand-partners.com

Business Structure
and Certifications:
CA Benefit Corporation
CA S Corporation # 2020137
SF LBE #CMD05271000616

Tax ID # 94-3281925
License # 0310097
DUNS No #107933116

Professional Employees:
12 Employees
4 Registered Architects
6 Design Staff
4 LEED APs
2 Administration
1 Marketing

As further illustrated in this SOQ, our team offers:

- Depth in State of California public school design, established working relationships with DSA
- Tested experience with consultants on the team with whom we share our record of success
- Projects that meet scope and budget and offer flexibility to deal with marketplace changes
- Sustainable design leadership including multiple CHPS, LEED and Green Point Rated projects
- A history as the architect of choice for our clients' most challenging and important projects.

Our combination of vision and practicality is unique. We are confident you will find our depth of project experience and overall qualifications, along with our commitment to providing quality design to align with the needs and requirements outlined in this RFQ.

"Gelfand Partners Architects received a copy of the District's form of Agreement for Architectural Services ("Agreement") attached as EXHIBIT A to the RFQ. Gelfand Partners Architects has reviewed the indemnity provisions in EXHIBIT A and insurance requirements contained in the Agreement. If given the opportunity to contract with the District, Gelfand Partners Architects has no objections to the use of the Agreement."

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

Gelfand Partners Architects certifies that no official or employee of the firm has ever been convicted of an ethics violation.

By virtue of this submission, Gelfand Partners Architects declares that all information provided is true and correct.

Our combination of vision and practicality is unique. We are confident you will find that Gelfand Partners Architects' depth of project experience, professional reputation, past work and overall qualifications and responsiveness align with the needs of your Oakland Unified School District.

Thank you for the opportunity to be of service.

GELFAND PARTNERS ARCHITECTS

Larry Schadt, AIA, ASLA, LEED AP

Partner and Principal-In-Charge & Point of Contact



5/7/2025

AWARDS & CERTIFICATIONS

Latest Articles About Us

- DSA California Sustainable Schools Showcase, *Los Altos School Districts' Blach Intermediate School*, 2022
- DSA Achieving Net Zero Energy & Net Zero Carbon in School Facilities, *District Wide Innovation...the "Blach Approach"*, 2022
- Joaquin Palomino and Trisha Thadani, *Broken Homes*, SFChronicle, 2022

Sustainable Renovations

- over 30 Projects
- +6,000 Units

CHPS Design

- 24 Educational Facilities
- 17 School Districts

Green Point Rated

- 17 Housing Projects

Bay Friendly Landscape

- 2 New Construction Projects

LEED Gold Certification

- Office conversion of the landmark building *Lick's Baths*
- Tom Waddel Public Health Clinic

Award Winning Projects

- Veterans Commons
- King-Garvey Co-op Apartments
- Martin Luther King Apartments
- Kelly Cullen Community
- Greenleaf Whitter K-8
- Santa Rita ES
- Loyola ES
- Los Altos Master Plan
- Claire Lilienthal School

**We acknowledge that we have recieved and reviewed Addendum #1 and 2 for this RFP.*



2.2 FIRM INFORMATION

2.2.1. BUSINESS STRUCTURE

Gelfand Partners is a 12-people Certified CA SBE and one of 12 architecture firms in the country, and one of only six in California, to be a **B-Corp** (*Public Benefit Corporation*). We design sustainable buildings that serve diverse and dedicated clients, encourage healthy personal and community life, and that develop positive impact on climate and our environment.

- CA Benefit Corporation
- CA S Corporation # 2020137
- Tax ID # 94-3281925
- License # 0310097
- SBE ID:0000019665

OFFICE LOCATION/MAILING ADDRESS

Gelfand Partners Architects
165 10th Street, Suite 100
San Francisco, CA 94103
(415) 346 4040 | gelfand-partners.com

SENIOR OFFICIALS AND STAFF COMPOSITION

- 2 Principals/Partners:
Lawrence Schadt, AIA, ASLA, LEED AP *
Austen Diliberto, AIA, LEED AP BD+C
- 1 Principal Emeritus:
Lisa Gelfand, FAIA, LEED AP
- 4 Registered Architects + 6 Design Staff
- 5 LEED APs and GAs
- 3 Business Development, HR & Accounting

Gelfand Partners is financially stable and capable of taking on new projects.

* Larry will be your Main Point of contact.

e: LARRY@GELFAND-PARTNERS.COM

Website



To learn more about GPA's architectural and social commitments scan the QR code or visit: www.gelfand-partners.com

LBE STATUS

Gelfand Partners Architects is a State of California Small Business. GPA is also a certified San Francisco Small Business Enterprise SBE ID:0000019665. Please check the link below for the certification letter.

<http://sfcitypartner.sfgov.org/pages/LBESearch/supplier-search.aspx>



Fairmeadow Elementary School, PAUSD, Palo Alto

FIRM HISTORY & BUSINESS INTRODUCTION

We are a full service partnership design firm based solely in San Francisco, founded as Gelfand Partners Architects in 1997 to the present. The office advances the design of civic facilities, schools and affordable housing to extend the benefits of sustainability for budget sensitive clients. Through imagination, responsive design and social engagement our practice reinforces the strengths of mature communities while enabling a healthy future for younger ones.

25	17	+7,300
Years of Continued Service	School Districts & Campuses	Housing Units

SUBCONSULTANT COORDINATION & THE STUDIO SYSTEM

We keep a core of staff consistent through all phases, avoiding problems that commonly arise in firms that hand off projects from designers to separate production and construction teams. Architecture is done in-house and engineering by the subconsultants, with coordination done by our Project Manager in house. Specifications are also done in house to capitalize on our depth of experience in construction and as an important step in our Quality Control process. Landscape and Interior Design are also performed in-house when appropriate.



Project featured in this section: Greenleaf Whitter K-8, OUSD, Oakland, CA

2.2.2 DESCRIBE FIRM'S APPROACH & WORKING WITH DISTRICT

These new projects at various school sites come at a pivotal time for OUSD. The pandemic was a huge and unprecedented strain on the district. It also showed how important it is to families and the Bay Area to have schools that children can attend on site and in person. Although technology has certainly made changes in the way teachers teach and children learn, nothing replaces the time children spend learning and playing and growing together in the same place. The pandemic and the pressure of wildfire smoke clarified for everyone that fresh air isn't just a code requirement, it's a prerequisite for healthy spaces that support alert and engaged students. And it's really those intensely diverse students and staffs that need our full attention.

Gelfand Partners has worked with OUSD for many years with our previous modernization at Greenleaf and most recently our project at Kaiser Elementary School. We have visited and revisited campuses in the district addressing access, seismic problems, and HVAC issues. We welcome the emphasis for these projects under \$10M, on holistic design to create high quality student-centered environments. We also feel that our long history of working together helps us understand the materials, systems, and approaches that the district can use and maintain year after year. We have seen campuses grow and shrink and we design the sites to be truly flexible, not just this year, but in the long slow rotation of substantial work on the campuses.

We would love to do more for OUSD similar to

what we did at Greenleaf – reuse a grand old building appropriately, provide the kind of kindergarten and T-kindergarten space that schools designed for half day kindergarten never had, a state of the art library and multipurpose building, and the one on one and small group counseling, tutoring, and meeting spaces that a Community School needs. All fit on a 1.8 acre site.

2.2.3 DESCRIBE FIRM'S EXPERIENCE DEVELOPING PROJECTS WITHIN POLITICAL ENVIRONMENT & FACILITATING COMMUNITY INVOLVEMENT

The first step in starting any kind of project is to familiarize with its context and stakeholders, then start gathering additional data which will inform the design stream, implement programming and guarantee code compliance. In this sense, we are keenly aware of the challenges faced by public entities creating public schools in an increasingly expensive and inequitable Bay Area: community outreach and reviews, entitlements, building and planning department, funding, etc. are all components that inform our process. Indeed, our approach to designing relies on an inclusive process that allows all stakeholders to participate and inform our design while the development team navigates a wide variety of needs, builds consensus and successfully manages and meets those stakeholder expectations.

SOLICITING INPUT AND FEEDBACK THROUGH OUTREACH INITIATIVES

We bring our commitment to positive social and environmental impact to the design process itself, by assuring a truly collaborative and inclusive approach.

Our commitment to client and stakeholder outreach is an integral part of our approach to architecture. Throughout our work in affordable housing, community facilities and K-12/higher education, we have often facilitated active participation not only from clients, owners and community advocacy groups, but also from the people and families who will themselves use the project. We have made multiple presentations over the years to board meetings, planning commissions, city councils, and community forums in support of affordable housing, and worked with simultaneous translators when necessary to ensure clear communication.

Our staff has great depth in conducting workshops and other forms of outreach. We rely heavily on visual models, renderings, and inclusive discussions, as this demystifies professional documentation and puts pens in the hands of community members. We commit whole project teams to take part in workshops, and that is why all of our professional staff with significant service time at GPA have the experience and practice to run roundtables and be hands on with stakeholders.

Our team will partner with the OUSD team to determine the best approach to engage the project stakeholders and develop the project program for each apartment complex.

2.2.4. EXPERIENCE MEETING SCHEDULES & TIMELINES

Whether it is a tight turnaround to secure funding, or a time-sensitive deadline to open the doors for students into new classrooms, Gelfand Partners Architects (GPA) works with districts to a schedule that meets your needs.

For instance, GPA was brought on in Fall 2024 by the Petaluma City Schools to provide designs for a two-classroom TK building to be provided by a modular building manufacturer.

GPA first produced schematic design drawings for the modular companies to offer their

bids. Then GPA had to provide a package for site improvements around the building.

It became evident that the modular company's package would arrive well past the optimum window to advertise for bidders. To keep the project on track, GPA worked with Petaluma City Schools and came up with a two-increment strategy: to prepare a site package and submit it to the Division of the State Architect (DSA) first.

While the site package increment was under review at DSA, the modular company could continue to prepare their package for an increment two submission. The plan worked: GPA was able to get the bids completed on time and within the proposed deadlines. The project is on track to complete the modular buildings in August 2025.

Potential agency delays: Gelfand Partners has extensive experience working with the Division of the State Architect (DSA). All of our school projects have been reviewed by DSA and 100% of them are closed with DSA certification. We understand that DSA can often take more time to review projects than was planned. But, in order to make sure that we have done all we can to expedite the review process, we always meet with DSA for a "pre-submission meeting" that allows GPA and DSA to come together and mutually understand the project scope and any special code considerations that may arise. The pre-submission meetings eliminate a lot of uncertainty for the subsequent review process and, hopefully, provide a streamlined DSA audit.

Should the DSA review start to extend into the construction schedule, GPA has frequently worked with school districts to go to bid prior to approvals. This can be risky to the school district, but GPA's knowledge of codes and DSA requirements helps to greatly reduce costly change orders once the DSA comments are made available.

SCHEDULE MANAGEMENT

We meet schedule deadlines through: thoughtful organization of the team and personnel to be assigned to a project; thorough knowledge of agency processes and code compliance and the application of BIM technology

2.2.5. PRE-K, TK-12 EDUCATION PROJECTS

Education experience of the firm includes master-planning, new construction and modernizations for the following pre-K, K-12 and higher education clients in the Bay Area.



EL CARMELO ELEMENTARY SCHOOL, PALO ALTO

The project at El Carmelo ES is a two-phase project. Gelfand Partners is providing new construction and modernization services to expand the school offer. The first phase includes new construction of a wood and steel multi-use building with flexible classrooms, an interior/ exterior stage, and an enrichment lab. The project also required site improvisation. The second phase will include renovation and conversion of the old stage room, which was also used as a lunch room, into two large classrooms.

The school building was just completed and closed out in June 2024.

Relevance
Modernization & New Construction

Owner
Palo Alto Unified School District
Miles Cappello, CM fs3H
(925) 446 2795 | miles@fs3h.com

Size
New 8,715 sf,
Modernization 2,470 sf

Construction Cost
Budget \$ 8,637,000
Bid \$ 12,180,000
Cost to Date \$ 9,097,480

No. of RFI's
380

No. of Change Orders
40

Project Team
Gelfand Partners
Principal-in-Charge
Lisa Gelfand, FAIA, LEED AP
Project Manager
Lawrence Schadt, AIA, ASLA, LEED AP

Subconsultants
Structural - Biggs Cardosa Associates
MEP - Engineering 350
Civil - BKF Engineers
Cost Est., - Cumming

DSA Final Certification
DSA#: 01 - 118594
Certification: 03-01-2024

Notice of Completion
Completed - October 2023
Close Out - June 2024





Relevance
Modernization & New Construction

Owner
Palo Alto Unified School District
Joe DaSilva,
Project Manager fs3H
(510) 585 7076 | joe@fs3h.com

Size
20,300 sf

Construction Cost
Budget \$ 12,180,000
Final \$ 17,512,752

No. of RFI's
-

No. of Change Orders
-

Project Team
Gelfand Partners - Prime Consultant
Principal-in-Charge
Lisa Gelfand, FAIA, LEED AP
Project Manager
Lawrence Schadt, AIA, ASLA, LEED AP

Subconsultants
Structural - Biggs Cardosa Associates
MEP Engineers - EDesignC
Civil Engineer - Carroll Engineering
Cost Estimating - Cumming

DSA Final Certification
DSA#: 01 - 114727
Certification: 07-03-2018

Notice of Completion
Completed - September 2020
Close Out - August 2018

ADDISON ELEMENTARY SCHOOL, PALO ALTO

Addison Elementary is a historic campus in the district's elementary school inventory. The existing school had a severely undersized multi-use building for this size of campus. The library and administration were cramped in a poorly laid out building at the center of campus. The project added a new two-story library/administration building with an adjacent multi-use appropriately sized for the school's ±350 student body. The old library/administration building was refurbished into a four-classroom wing. New buildings were styled to be sensitive to adjacent, existing school buildings and neighborhood while providing the amenities and safety of modern construction and technology.





GREENLEAF SCHOOL (TK-8), OAKLAND, OUSD

This project converted an existing Oakland elementary school into a K-8 school. Situated on a tight 1.8 acre site, the buildings had to be multi-story and multipurpose. A new two-story wing houses classrooms and science labs for 7th and 8th grades, as well as administration and library spaces that also function as an after hours meeting and community resource center. The new multi-use building also houses performance and STEM space. The existing classroom building has been modernized.

Relevance

Modernization & New Construction

Owner

Oakland Unified School District
Kenya Chatman,
Facilities Coordinator | (510) 535 7050
kenya.chatman@ousd.k12.ca.us

Size

48,000 sf

Construction Cost

Budget \$ 34,600,000
Bid \$ 34,700,000 (GMP)
Final \$ 34,100,000

No. of RFI's

504 (two phases)

No. of Change Orders

0

Project Team

Gelfand Partners
Principal-in-Charge
Lisa Gelfand, FAIA, LEED AP
Project Manager
Lawrence Schadt, AIA, ASLA, LEED AP

Subconsultants

Structural - KPW Structural Engineers
MEP - YEI Engineers
Civil - Carroll Engineering
Cost Est., - Leland Saylor Associates

DSA Final Certification

DSA#: 01 - 114727
Certification: 07-03-2018

Notice of Completion

Completed - August 2017
Close Out - August 2018





Relevance
Landscape and Accessibility Design

Owner
Oakland Unified School District
Victor Manasala,
Senior Project Manager,
OUSD Facilities Planning & Management
(510) 535 2718 | victor.manasala@ousd.org

Project Team
Gelfand Partners
Principal-in-Charge
Lisa Gelfand, FAIA, LEED AP
Project Manager
Lawrence Schadt, AIA, ASLA, LEED AP

Subconsultants
Structural Engineer
IDA Structural Engineers
MEP Engineers
YEI Engineers
Civil Engineer
CaliChi Design Group
Landscape Architect
PGA Design

Construction Cost
Budget \$ 6,150,000
Bid \$ 6,600,000
Cost to Date \$ 6,651,440

Size
17,800 sf Interiors + 86,976 sf Play Yard

Project Start Date
2021

Completed
06/30/2024

DSA Application
DSA#: 01 -120416
Certification: In Progress

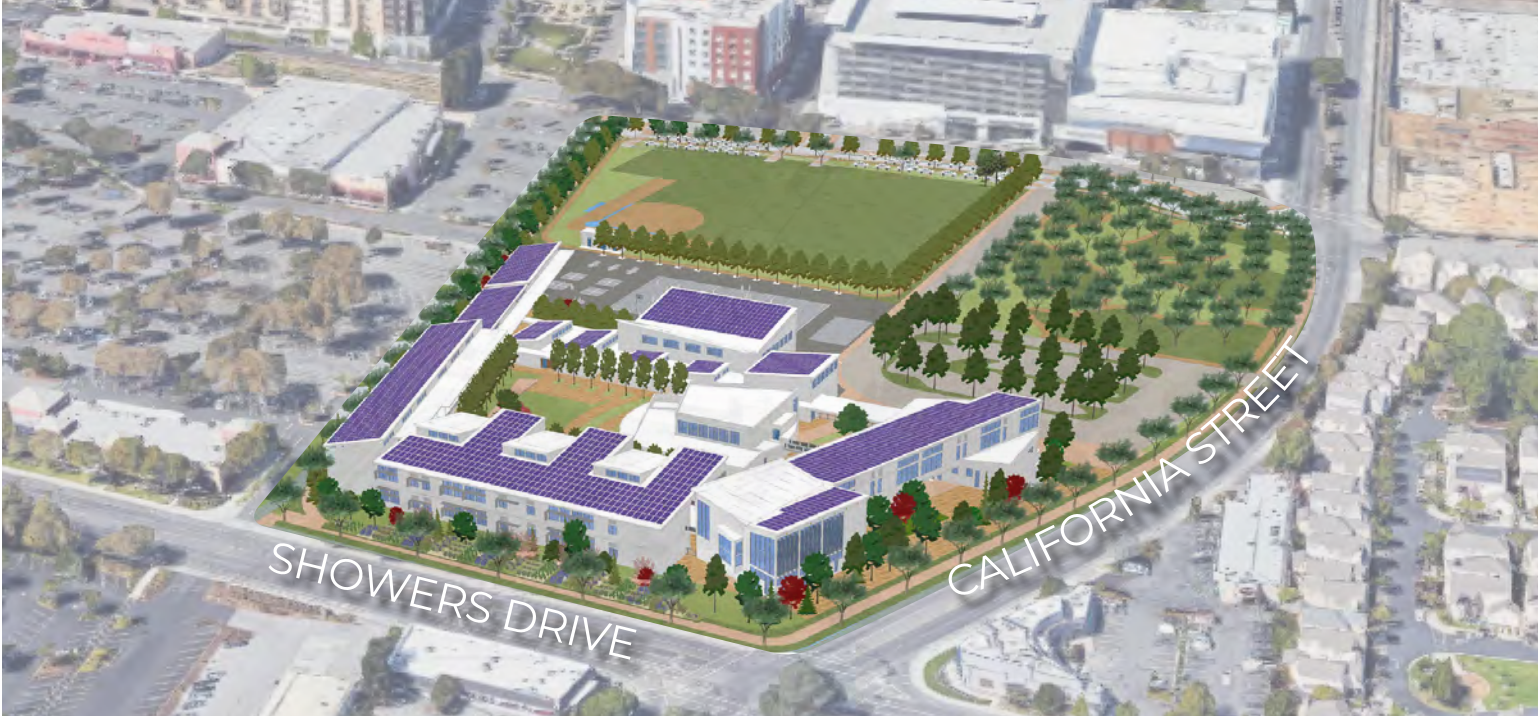
No. of RFI's
117

No. of Change Orders
7

KAISER EARLY CHILDHOOD DEVELOPMENT, OAKLAND

This former elementary school campus is to be re-purposed as an early childhood development day care facility. There presently is a classroom wing and a multi-use building to be used by the program. Ten feet above the building level, atop a steep, planted slope, there is a large area of asphalt. The original design intent was to add an ADA ramp with landings and handrails to access the asphalt. The design team has come up with an alternate plan to regrade the steep slope into a gently cascading series of planted levels with play equipment. The shallow regrading will provide for a series of sloping walks that are not required to have curbs or handrails enhancing inclusivity among children approaching the playground. These allow for easy access to each tiered level with different play equipment stations, stimulating plantings, and shade trees, all while creating a path that can be actively used by every student. The design also greatly reduces the amount of pavement, thus allowing for greater stormwater capture and filtration which slows the surge of rainwater in a storm event.



**Relevance**

Feasibility, Masterplan DD, Bridging Docs

Owner

Los Altos School District
 Randall Kanyon,
 Asst. Supt., Business Services LASD
 (650) 947 1160 | rkanyon@losaltos.k12.ca.us

Construction Cost

Budget \$120,000,000
 Final \$ TBD

89,018 sf of built area
 + 7-acre outdoor area

Project Start Date

2020

Notice of Completion

In construction - Design Build

DSA Certification

N/A - Completed through DD & Bridging Docs

Project Team

Gelfand Partners
 Principal-in-Charge
 Lisa Gelfand, FAIA, LEED AP
 Project Manager
 Lawrence Schadt, AIA, ASLA, LEED AP

Subconsultants

Structural Engineer
 Biggs Cardosa Associates
 Civil Engineer
 Urban Design Consulting

Delivery Method

Design-Bid-Build to Design Build

LOS ALTOS SCHOOL DISTRICT 10TH SITE, LOS ALTOS

In December 2019, the Los Altos School District acquired an approximately 11.7-acre site, located at the corner of California Street and Showers Drive in the City of Mountain View, which will host its 10th School Site as well as a 2-acre park.

Gelfand Partners provided Masterplanning services evaluating the largest possible student population (900 students), joint use facilities and best location for the campus. Meetings with local authorities, the District and city officials were held over a period of 4 years, both in person and virtually, providing all parties involved with visuals, numbers, 3d representations and physical models to assure community engagement and understanding of the process.

Gelfand Partners completed the project through DD and created the bridging documents to hand over for the Design Build process.





Relevance
Seismic Strengthening & Modernization

Owner
San Francisco Unified School District
Andrea Dawson,
Senior PM SFUSD Bond Program
(415) 265 4265 | dawsona1@sfusd.edu

Project Team
Gelfand Partners
Principal-in-Charge
Chris Duncan, AIA, LEED AP
Project Manager
Patty Haight, AIA, LEED AC

Subconsultants
Structural Engineer
Cornerstone Structural
MEP Engineers
Engineering350
Civil Engineer
Urban Design Consulting Engineering
Cost Estimating
Leland Saylor Associates

Construction Cost
Budget \$ 25,834,548
To Date \$ 41,294,571

Size
158,000 sf

Project Start Date
2015

Completion
01/31/2022

DSA Application
DSA#: 01-117610,
Ph.1: 01-112889, Ph. 2: 01-113254
Certification: 06-09-2023

No. of RFI's
None

No. of Change Orders
24

GEORGE WASHINGTON HIGH SCHOOL, SAN FRANCISCO

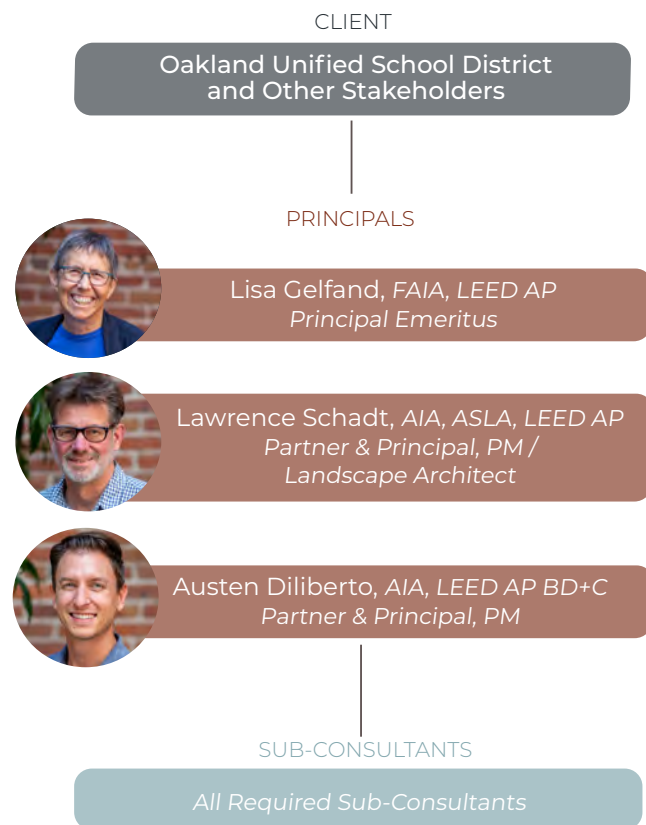
Washington High was determined to need seismic strengthening by the state wide survey and a tier one analysis. This building is also a pour-in-place reinforced concrete structural and because it is a historically significant building the added structural work was located away from the exterior walls of the building. This had significant impact not only on the interiors of the corridors, classrooms and offices, but also most of the utilities running throughout the building. The foundations for the new structural work are supported on 116 micropiles each requiring access for the drilling rig. Due to the location of some new foundations and the route of the main electrical service to the campus the entire electrical distribution system needed to be replaced. Under construction with a duration of over 2 years while the school is occupied.



2.2.6. KEY PERSONNEL

Gelfand Partners is structured on the studio system, with Principals involved throughout the duration of the project from Conceptual Design to Construction Administration, and design team remaining consistent to guarantee throughout understanding of the project and shared design goals. Architecture and Landscape and Interior Design are performed in-house, while engineering and specialty disciplines are taken care by our sub-consultants team. We value early and significant involvement of our technical sub-consultants in conceptual and schematic phases of the project, to assure projects stay on time and on budget. The use of Revit BIM software has given us an additional tool in integration of building systems during the initial stages of design, which helps achieving additional cost estimation accuracy. Specifications are also done in house as an important step in our Quality Control process as illustrated in later section of this qualifications package.

ORGANIZATIONAL CHART



MEET YOUR PROPOSED TEAM

For your upcoming projects at Oakland Unified School District we propose to staff Principal and main point of contact **Larry Schadt**, Project Architect **Bingbin Zhou**, Project manager **An-gie Kim** and Sr. Interior Designer **Katie Larson**, along with design staff as needed.

ASSOCIATES



Bingbin Zhou, AIA, LEED AP
Project Architect and Associate



Katie Larson, IIDA, AIA Assoc.,
Sr. Interior Designer Associate

DESIGNERS



Cheryl Cheu,
Job Captain



Angie Kim, AIA Assoc.,
Job Captain



Kamilah Acebal-Acevedo,
Job Captain



Niveditha Elango, AIA Assoc.,
Designer & Marketing Coordinator



Betty Nip,
Designer

BUSINESS MANAGEMENT



Janice Hammock
Office Manager & Human Resources



Jacquie Maitia,
Accounting Manager





2.3. LITIGATION HISTORY

Gelfand Partners Architects has no litigation, arbitration, or negotiated/settled history with previous clients, nor any claims in which our firm has been involved.

- There is no legal action pending against GPA by another public agency
- There has not been any settlements or judgments involving such actions within the last five (5) years

*Project Featured in this section:
Marin Horizon High School, Mill Valley, CA*



2.4. FEE INFORMATION

FEE SCHEDULE

STAFFING PLAN EXPECTATIONS

As mentioned in previous sections, Gelfand Partners is organized on the studio system, with project teams formed during the programming stage and remaining consistent all the way through the construction phase. As a 12-person firm with 2 Principals 1 Principal Emeritus and a professional design staff of 6 we have the capacity to provide services on a number of projects at the same time, allowing one principal, Larry Schadt, to remain on projects from schematic design through completion.

The percentage of involvement of each member of the team will vary throughout the course of the project, from phase to phase and depending on the specific Scope. The Project Manager will be your prime day-to-day contact and will work with the support of the rest of the team on your project from start to finish. The Job Captain will manage internal communication and production of drawings and deliverables. Additional support staff will also be assigned to the project on a as needed basis to meet client requests and project milestones efficiently.

Generally, this is what percentages of time invested will look like:

KEY PERSONNEL STAFFING PLAN %

Lisa Gelfand, FAIA, LEED AP Principal Emeritus.....	10-15%
Lawrence Schadt, AIA, ASLA, LEED AP Principal in-Charge/PM.....	50-100%
Angie Kim, Assoc. AIA Project Manager/Job Captain.....	50-80%

OTHER STAFF

Design Staff.....	70-100%
Interior Designer.....	30-50%
Landscape Architect.....	10-20%
Business Administration.....	>5%

2025 GELFAND PARTNERS HOURLY RATES

Managing Principal Architect	\$250
Principal Architect.....	\$230
Landscape Architect.....	\$230
Project Manager	\$200
Senior Project Architect	\$200
Project Architect	\$190
Job Captain.....	\$155
Interior Designer.....	\$140
Design Staff	\$140
Clerical Support.....	\$100
Consultants.....	rate x 1.1
Expenses.....	cost x 1.1

BILLING PRACTICES

Gelfand Partners makes use of various methods when building fee proposals depending on type, scope and size of each individual project. Whether it's master-plan services, new construction or modernization, we will suggest the billing strategy that is most convenient to control cost and time, both for the owner and the A/E team. As a matter of fact, over the years we have become familiar with both the OPSC scale and the Washington State criteria, as well as fixed fee and percentage of construction costs.

The following is a breakdown of what services are typically included in our Basic Services, regardless of the fee structure being used. 21.2.3 provides a detailed list of additional costs and reimbursable expenses. The OPSC sliding scale for modernization and new construction provides a measure of what is included in Basic Services and what not:

Included in Basic Services Fee

Architectural, Interiors, Structural, Mechanical, Electrical, Plumbing, Landscape, Civil (on-site grading and utilities), basic programming.

In the intervening years various new services have been added to the original basis. Depending on applicability, Gelfand Partners may negotiate fee adjustments for such services as a SWPP on a large site, certification under CHPS or LEED, enhanced commissioning, extensive movable furniture or other non-permanent equipment specification, joint use park or other uses with other public entities, and coordination of alternative project delivery methods.

Specialty Consultants Not Included in Basic Services Fee

Cost Estimating, Civil (off-site, hydrology), Food Service Design, Fire Suppression, Security/ Low Voltage, Seismic Assessment, CEQA/EIR, Geo-technical, Field Verification/As-Built Creation, DSA Close-out of Uncertified or other certifications, Environmental Hazardous Materials Testing, Traffic Studies, Interim Housing Packages, Incremental DSA Submittal, FF&E Selection, Energy Study/Audit, LEED or CHPS Documentation. These items, as required, shall be added to the base fee.

The basis for proposals for such services beyond OPSC Basic Services would be the anticipated effort, sub-consultant or expense costs at a ten percent mark-up, or time and materials costs consistent with the rates on the previous page.

FIXED FEE/PERCENTAGE

Gelfand Partners actively uses the OPSC Fee Schedule when determining fees for educational projects and therefore is open to being compensated using this method as well.

Contract Amount	New Constr.	Modern.
First \$500,000.....	9.0%	12.0%
Next \$500,000.....	8.5%	11.5%
Next \$1,000,000.....	8.0%	11.0%
Next \$4,000,000.....	7.0%	10.0%
Next \$4,000,000.....	6.0%	9.0%
Excess of \$10,000,000.....	5.0%	8.0%

When the OPSC Schedule does not apply or is not applicable (e.g. the project is at an early stage or there is no defined construction budget yet), fees will be based on staffing expectations. As illustrated in the previous section, these vary from project to project and from phase to phase. However, our fee proposals, will reflect each team member’s involvement and expertise in completing the project.

ALTERNATIVE PRICING

As anticipated in the introduction of this section, over the years we have been compensated through various fee methods. In addition to fixed fee and percentage of construction cost we have also worked with clients on small size projects and interiors on an hourly or hourly not to exceed basis. This method applies to project that are limited in scope or whose scope is yet to be explored.

Potential Fee Reduction/Efficiencies

In establishing fair fees for each project, we will look at ways to reduce our fees below the established scale and maximums and offer reductions through a series of possibilities:

- 1. Plan re-use / site adapts of previously designed buildings
- 2. Multiple concurrent projects with the District
- 3. Repeated design components
- 4. Reduced scope of services
- 5. Reduction for modularized custom or PC Approved modular

ADDITIONAL COSTS

Reimbursable expenses are in addition to compensation for our Pre-Design Services and Additional Services and include expenses incurred by the Architect and the Architect’s employees and consultants in the interest of the Project. Reimbursable expenses generated by additional services will be billed separately.

Reimbursable expenses include (or as otherwise negotiated):
ground transportation; electronic and hard copy reproduction costs, including large format scanning; mailing and shipping; additional consultants; permits and fees; renderings, models; and costs of photography; consultant fees not included in the Basic Fees.

Lastly, any additional services, such as but not limited to unforeseen conditions, will be negotiated and billed hourly.

Project featured in this section:
Vanden High School, Fairfield, CA



**See sample project fee breakdown in Appendix*



RELEVANT EXPERIENCE

ADDITIONAL EDUCATION PROJECTS

Education experience of the firm includes master-planning, new construction and modernizations for the following pre-K, K-14 and higher education clients in the Bay Area:

- Berkeley Unified School District
- Children Council of San Francisco
- City College of San Francisco
- Contra Costa Community College District
- Fremont Unified School District
- Good Samaritan Preschool
- John Swett Unified School District
- Livermore Valley Joint Unified School District
- Laurel Hill Nursery School
- Los Altos School District
- Marin Horizon School
- Mount Diablo Unified School District
- Novato Unified School District
- Oakland Unified School District
- Palo Alto Unified School District
- Redwood City School District
- San Mateo Unified High School District
- San Carlos School District
- San Francisco Unified School District
- Sonoma Valley Unified School District
- Travis Unified School District
- University of California
- Peralta Community College District
- Yolo Crisis Nursery
- Yuba Community College District

In the past five years we count completion of 4 modernizations plus new construction elementary and middle schools, modernization efforts on 3 preschools, 1 playground conversion, and maintenance and repairs on multiple sites across 5 Districts. We also provided seismic retrofit for 2 historic high schools in San Francisco and a student housing facility for UCSF. We have completed several TIs for UCB and UCSF and are currently awaiting approval on the modernization and expansion of CCSF Evans Campus. And currently under construction is the TK-8 for LASD's 10th school site.

The next few pages provide detailed information on our latest most relevant projects for this RFQs. Please note GPA was involved in no claims made on the following projects.

*Project featured in this section:
Addison Elementary School, PAUSD, Palo Alto*



FEE PROPOSAL - SAMPLE

BASED ON A SAMPLE PROJECT AT \$10 MIL

Architect's Fee Per OPSC Scale

Contract Amount		Resulting Fee
First \$500,000	12%	\$60,000
Next \$500,000	11.5%	\$57,500
Next \$1,000,000	11%	\$110,000
Next \$4,000,000	10%	\$400,000
Next \$4,000,000	9%	\$216,000
Subtotal per OPSC Scale		\$843,500
+ 3% Reimbursable Fee		\$25,305
Total Architect's Fee		\$868,805

Technical Consultants' Fees

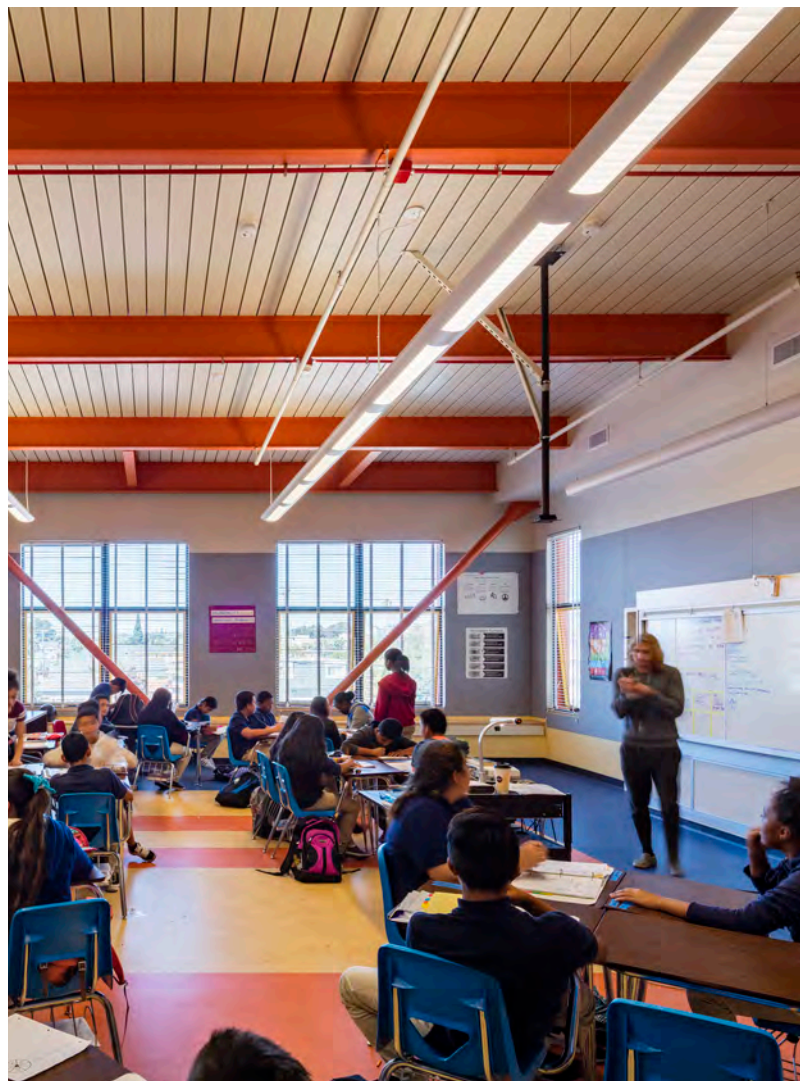
<i>Discipline</i>	<i>Proposed Fee</i>
Structural Design	\$70,000
MEP/Low-Voltage	\$225,850
Civil and Surveying	\$44,768
Landscape & Play Yard Design	\$131,625
Cost Estimating	\$42,400
<hr/>	
<i>Total Consultants' Fees</i>	<i>\$514,643</i>

A/E Fees Breakdown per Phase

<i>Phase</i>	<i>Total Fee</i>
Conceptual Design	\$61,740
Schematic Design	\$295,377
Design Development	\$335,745
Construction Documents	\$397,269
Bidding	\$34,489
Construction Administration	\$241,452
Close Out	\$17,376
<i>Total A/e Fees</i>	<i>\$1,383,448</i>

Additional Services

Seismic Retrofit & Relocation of Telecommunication Pole	\$62,000
Additional MEP Permitting	\$7,500
Topographic Survey	\$14,625
Total	\$84,125





Lawrence Schadt, AIA, ASLA, LEED AP

PARTNER | PRINCIPAL & LANDSCAPE ARCHITECT

Larry is a licensed architect and landscape architect who has over 28 years of professional design experience, with 23 in architecture and five in landscape architecture. His duties include project management, design, construction documents and construction administration.

SELECTED PROFESSIONAL EXPERIENCE

K-12 EDUCATION (PARTIAL LIST)

- El Carmelo Elementary School, Palo Alto Unified School District, Palo Alto, modernization and new construction, *Completion August 2023*
- 10th Site LASD k-8 School Campus, Los Altos School District, Los Alto - Mountain View Joint Facility, New construction, *Currently in SD*
- Multiple Pre-K Sites, Berkeley Unified School District, Berkeley, modernization, *Currently in CD-Bid-Construction*
- Addison Elementary School, Palo Alto Unified School District, Palo Alto, modernization and new construction
- Greenleaf K-8 School, Oakland Unified School District, Oakland, modernization and new construction
- John Swett High School, Crockett, modernization and new construction
- Marin Horizon School (K-8), Mill Valley, modernization and new construction
- Hoover Middle School, San Francisco Unified School District, San Francisco, accessibility upgrade and modernization
- Duveneck Elementary School, Palo Alto Unified School District, Palo Alto, modernization and new construction
- Vanden High School, Travis Unified School District, Fairfield, modernization and new construction
- Mission High School, San Francisco Unified School District, San Francisco, accessibility upgrade and modernization
- Fairmeadow Elementary School, Palo Alto Unified School District, Palo Alto, modernization and new construction
- Plan-checking consultant to DSA (*Division of the State Architect*)
- Bullis Elementary School, Los Altos School District, Los Altos, modernization and new construction
- Los Altos School District Master Plan Update, Phase 2, Los Altos

HIGHER EDUCATION (MAJOR & MINOR PROJECTS)

- University of California Berkeley, TIs and ADA Improvements:
 - Haas MBA Lounge relocation
 - Valley Life Sciences Building office renovations
 - 2275 Virginia Street ADU
 - University Hall Room 615 renovation
 - Wellman
 - Wheeler and Hilgard Halls
 - Hearst Gym
 - Gustafson ADA various sites
 - Goldman Center
 - 2015-2021 Channing Way Barrier Removal
 - Chou Hall
- University of San Francisco:
 - 2130 Post Street - Student Housing Retrofit
 - Medical Sciences Building - 3rd floor units, TI
- College of Alameda, Peralta Community College District, Alameda, modernization of gymnasium building
- Laney College TV Studio, Peralta Community College District, Oakland



EDUCATION

University of California, Berkeley, M.Arch.

University of California, Berkeley BA,
Landscape Architecture, cum laude

REGISTRATIONS AND AFFILIATIONS

Registered Professional Architect
California Lic. #C29266

Registered Landscape Architect
California Lic. #LA6190

LEED Accredited Professional

USGBC

American Institute of Architects

AWARDS & PUBLICATIONS

Leroy F. Greene Design Award of Merit,
AIA California/CASH (Coalition for Adequate
School Housing), Vanden High School,
Fairfield, 2008

Best Silver Award, Design Collabition,
Schooldesigner.com, Vanden High School,
Fairfield, 2008

Green Apple Award, CHPS (Collaborative for
High Performance Schools), Loyola
Elementary School, Los Altos, CA, 2007

DesignShare /School Construction News,
Recognized Value Award, Vanden High
School, Fairfield, CA, 2006

Place Design Award, Places Journal/Environ-
mental Design Research Association, Los Al-
tos School District Master Plan Update, 2005

AIASF Green Design Award, Los Altos School
District Master Plan Update, 2004

With the Office of Lawrence Halprin:

Presidential Award for Design Excellence, FDR
Memorial, Washington, DC, 2000

Opal Award of Merit, ASCE, Lake Shore Drive
Improvement Project, Chicago, IL, 1998



EDUCATION

B. Arch., Southern California Institute of
Architecture, 2014
Diablo Valley College, 2006

REGISTRATIONS AND AFFILIATIONS

Licensure candidate for ARE
LEED AP BD+C Candidate

Angie Eunji Kim, AIA Associate Member

ARCHITECTURE DESIGNER

Angie has over 10 years of experience as an Architecture Designer, Project Manager, and Office Manager from Los Angeles to San Francisco. Her portfolio includes a variety of projects from Housing to commercial projects, pro-bono projects, city projects, and educational projects for which she was engaged in schematic design to construction administration phase.

PROFESSIONAL EXPERIENCE

with Gelfand Partners Architects

HOUSING & COMMUNITY

- Swiss American, San Francisco, CA.
- TNDC Ritz Hotel, 90-unit SRO modernization, San Francisco, CA.
- 2205 Mission Casa Adelante, high-rise affordable housing, San Francisco, CA.
- 1786 Golden Gate Avenue, San Francisco, CA.
- Notre Dame, housing units modernization, San Francisco, CA.

COMMERCIAL

- Presidio Building 39, San Francisco, CA.

EDUCATION

- CCSF Evans Workforce Development Campus, Sprung Fabric Structure Interim Housing, San Francisco, CA
- CCSF Evans Workforce Development Campus, Core and Shell Retrofit, full campus modernization, San Francisco, CA
- Marin Horizon School (K-8), \$4.2 million new construction of a two-story library/classrooms and learning center building, Mill Valley, CA
- PAUSD Hoover ES, new construction, Palo Alto, CA
- PAUSD El Carmeno ES, modernization and new construction, Palo Alto, CA
- UCB University Hall Rm 615 & Rm 171, TI, Berkeley, CA
- George Washington High School, \$36 million seismic upgrade of historic high school, San Francisco, CA

PREVIOUS PROFESSIONAL EXPERIENCE

in other employment

- Openscope Studio, Inc. Architectural Associate
- COTTONWOOD + IDA Development, Bozeman, MT.
- Various ADUS, San Francisco, CA, schematic design to construction administration. Anticipated and solved time sensitive construction issues
- Storefront Remodel, San Francisco, CA. Permit Sets
- RFP Proposals. Assisted Project Manager
- TKC Business Accelerator, Keumula, HI, Project Manager
- Sea Vista Residence, Malibu, CA, Project Manager
- Channel 35 Television Studio, Los Angeles, CA. Assisted construction documentation sets
- Wolf Connection, Acton, CA, schematic design. Designer
- Carlson-Reges House, Los Angeles, CA. Assisted Code Compliant Sets
- RFP, SOQ, TOS Proposals. Designer and Manager
- Invoices and Billing. Account Manager for all project

Bingbin Zhou, AIA, LEED AP

ASSOCIATE, PROJECT ARCHITECT

Bingbin is a CA licensed architect with a 11 years experience and strong design background. She brings her multidisciplinary approach and inter-cultural experience to all her projects. She strives to achieve excellence in design and puts high emphasis on creating user-friendly, flexible and sustainable high quality space with design innovation and technology integration. She has worked on all phases of the architectural processes, from programming to construction administration. Her portfolio includes numerous mixed-use, institutional, high-rise and educational projects.

PROFESSIONAL EXPERIENCE

with Gelfand Partners Architects

EDUCATION

- UC Berkley HAAS MBA Lounge, Berkeley, CA
- CCSF Evans Workforce Development Campus, San Francisco,
- Marin Horizon School, Mill Valley
- Washington High School, San Francisco

HOUSING

- 2205 Mission affordable housing project, San Francisco - Project Architect
- Marin Horizon School, Mill Valley
- TNDC Ritz Hotel, San Francisco
- 1535 Jackson Street Housing, San Francisco, Design Team

COMMUNITY BUILDING

- Little Jungle Childcare, San Francisco - Project Architect
- Community Music Center, San Francisco
- 1337 Evans Avenue Childcare, San Francisco

PREVIOUS PROFESSIONAL EXPERIENCE

in other employment

- JRDV Architects, Oakland CA
Architectural Project Desinger (2/2015-1/2020)
 - Managed design and construction on several multifamily residential projects
 - Coordinated interests of developers, neighbors, city council members, and building officials to drive urban infill developments from initial planning to final permit
 - Anticipated and solved time sensitive construction issues
 - Resolved numerous conflicts between building owners, architects, and contractors.
- CallisonRTK, Shanghai, China
 - Architecture Designer(Summer 2014)
- DP architects, Singapore



EDUCATION

M.Arch. Washington University in St.louis
2014 graduated with honors
B.Arch. Architecture, Minor in Science,
Hunan University, China 2012

REGISTRATIONS AND AFFILIATIONS

Registered Professional Architect
California Lic. #C38886

USGBC - LEED AP BD+C

American Institute of Architects AIA

AWARDS

Enterprise Rose Architectural Fellowship Finalist, 2017

One of five public interest designers selected as finalists to support sustainable and affordable housing development

Timme Traveling Fellowship, 2015

Awarded to study the long-term impact of mega-projects in various South African cities

Wong Cross-Disciplinary Fellowship, 2014

Awarded to a graduate level student whose cross-disciplinary training in real estate development, architecture, & urban design demonstrates leadership aspirations

Mutlow Scholarship in Housing, 2013

Awarded to an upper-division student for work in senior, family, or mixed-use housing that addresses socioeconomic concerns. Academic work selected for exhibition

VOLUNTEERING

PAUSE



EDUCATION

2008 University of Southern California
B.Arch., Minor Emphasis in Art History

2007-08 Center d'Etude d'Architecture et
d'Urbanism, Emphasis in Architecture

2003 Sacramento City College,
Graphic Design, Fine Arts

REGISTRATIONS AND AFFILIATIONS

IIDA, SFCC

AIA Associate Member #30525544

NCARB Record #822522

LEED CERTIFICATIONS

Sacred Heart Lower & Middle Schools

LEED Platinum

310 University

LEED Silver

Watsonville Water Resources Center

LEED Platinum

North Elementary School Library

LEED Gold

Katie Larson, IIDA, NCARB, SFCC

ASSOCIATE | SENIOR INTERIOR DESIGNER

Katie has 16 years of professional experience, ranging from large scale master plans to intimate interior design projects with a strong emphasis on graphics, furniture and finish selection. She especially enjoys client and community engagement, holding many all-hands-on workshops with clients in order to gain a strong sense of what the client and community is really looking for in their new space.

PROFESSIONAL EXPERIENCE

with Gelfand Partners Architects

- UC Berkeley Haas MBA Lounge, Berkeley, CA
- Sustainable Conservation Office TI, San Francisco, CA
- Bernal Heights Neighborhood Center, Market Heights Apartments Community Room TI, San Francisco
- Tennyson Garden's Community Center and Offices, Hayward
- Luminous Computing, Office TI Design, Palo Alto
- Jewish Vocational Services, Office Master Plan, SF
- Empyrean Towers Community Rooms and Offices, Oakland
- Los Altos School District, Los Altos, CA. 10th Site Masterplan and Schematic Design
- Children's Council of San Francisco, San Francisco CA. Facilities Master Plan and Model FCC Play Lab Design TI.
- Beneficial State Bank Branch, Fresno, CA. Tenant Improvement
- 785 Market Street, (10th, 13th and 15th floors), San Francisco, CA. Tenant Improvement
- Good Samaritan Pre-School, TI, San Francisco
- Yolo Crisis Nursery, New construction, Davis, Currently in permitting
- Children's Council of San Francisco, Facilities Master Plan and Model FCC Play Lab Design TI, San Francisco
- Sustainable Conservation, Office TI Design, San Francisco
- Bullpen, Office TI, San Francisco

PREVIOUS PROFESSIONAL EXPERIENCE

in other employment

- Broadway Terrace, Mixed-Use Retail, Oakland, CA. 400,000 sf, Phase 1 Built, Phase 2 Under Construction
- 2129 Shattuck Hotel & Restaurant, Berkeley, CA
252,000 sf, Under Construction, 2014-2018
- Solano Community College Facilities Master Plan, Vacaville, Vallejo and Fairfield Campuses, 2017
- Coliseum City, Master Plan, Oakland, CA. 12 million sf, 2016
- D2 City Center Master Plan, An Phú, District 2, Ho Chi Minh City, Vietnam
430,000 sf, 2018
- Plaza Arcadia Master Plan, Kuala Lumpur, Malaysia
310,000 sf, Built, 2012-2017
- Park City Hanoi Master Plan & Mall Design, Hanoi, Vietnam
18 hectare master plan, DD Completion, 2014-2018
- West Songjiang Innovation City, Master Plan and Campus Design, Songjinag, Shanghai, China, 10,000,000 m², Under Construction
- Shanghai Village, High End Retail And F&B, Shanghai, China (Shanghai Disney), 50,000 m², Phase 1 Complete, 2016





STRUCTURAL ENGINEERS

FIRM PROFILE

IDA Structural Engineers, Inc. (IDA) is a 17-person, full-service consulting structural engineering firm, located in Oakland and established in 1986. Our engineers have designed and upgraded buildings for school districts throughout the Bay Area and are very familiar with Oakland USD campuses. We have also begun working with the district on a Facility Master Plan.

SMALL & LOCAL CERTIFICATIONS

We are certified as a CA Small Business as well as:

- Small Local Resident Business Enterprise (SLRBE) by OUSD, exp. November 6, 2025
- Small, Local, Emerging Business (SLEB) by the County of Alameda, exp. June 30, 2026
- Small Local Business Enterprise (SLBE) by the City of Oakland, exp. August 31, 2025

FIRM OVERVIEW

IDA's experience includes new buildings, building studies, seismic assessments, and historic retrofits of a variety of projects. We have extensive experience with K-12 public school projects, both new buildings and seismic retrofits.

For the evaluation and renovation projects, we recognize the need to accurately assess conditions, consider overall programming of the project, translate architectural goals into structural fixes, and provide a detailed, comprehensive assessment. We work with each owner to prioritize improvements and provide efficient, constructible options to allow them to choose cost-effective designs. We are team players who strive to anticipate challenges, create innovative solutions, and produce efficient renovations.

Our staff includes members of the Structural Engineers Association of Northern California (SEAONC) as well as a Structural Engineers Association of California (SEAOC) Fellow.

Principals Jason Lee, SE, Elliott Goodwin, PE, and Steve DeJesse, SE, have conducted detailed seismic studies and retrofits, and provided innovative and cost-effective designs for public school districts in the Bay Area. Our Associate, Jon Kiland, SE served on the American Society of Civil Engineers, ASCE-7, National Standards Committee and was Co-Author of the SEAOC Structural/Seismic Design Manual Series for over 20 years.

OAKLAND UNIFIED SCHOOL DISTRICT PROJECTS

OUSD Laurel Child Development Center

IDA designed this new 7,500 sf single-story structure with four pre-school classrooms for 108 children.

OUSD Garfield Elementary School Seismic Study

IDA conducted ASCE 41-17 Tier 1 and 2 analyses of the structural systems of the 1960s and 1970s buildings.

OUSD McClymonds High School Design-Build

Seismic retrofit and modernization of four buildings originally constructed in the 1950's. Retrofits include a new steel braced frame in the gym, steel braces in the shop building at the sawtooth roof, new connections and the addition of concrete shear walls, and carbon fiber polymer reinforcing to selected elements.

OUSD Melrose Leadership Academy

IDA initially conducted feasibility studies for the Maxwell Park Campus and Sherman Campuses. Currently, we are designing a new 10,500 sf, 2-story middle school building and renovation of the existing Maxwell Building, including a/v upgrades, new mechanical systems, and seismic strengthening.

OUSD Fremont High School Modernization

IDA is providing structural design for this modernization, supporting the removal and replacement of the existing roofing for two buildings, existing portables, and an existing elevator in the Media Building.

OUSD Roosevelt Middle School, Oakland

IDA conducted an ASCE 41-17 Tier 2 study and developed rehabilitation recommendations on three existing buildings at this 80-year-old campus. Based on the findings, IDA is upgrading the classic Classroom/Auditorium building while keeping the classic architecture.

Achieve Academy, Design-Build, Oakland

IDA designed this new 21,760 sf 2-story academic building for a grade TK-5 Charter Elementary School authorized by OUSD. The new facility includes 20 classrooms, flex spaces, and more.

OUSD CCS (at Santa Fe Campus) Renovation, Oakland

IDA designed improvements and foundations for portable buildings for California Children Services.



STRUCTURAL ENGINEERS



JASON M. LEE, SE
PRINCIPAL

EDUCATION

University of California, Davis
Bachelor of Science in Civil Engineering, 1997

REGISTRATION

California Civil Engineer, 2001 (#C61814)
California Structural Engineer, 2006 (#S4980)

PROFESSIONAL AFFILIATIONS

Structural Engineers Association of Northern California
(SEAONC) Member SE

GENERAL EXPERTISE

Jason Lee has over 28 years of experience in structural analysis and design. He has worked on a wide range of new and existing buildings including public, commercial, multifamily, mixed-use, and institutional projects of wood, steel, and concrete construction. Jason is a problem solver who works closely with each team to efficiently design projects and meet project goals. Jason enjoys working on complex projects. He has worked on a wide range of educational projects including the design of a 50,000+ square foot replacement public elementary school campus and improvements to projects in the Oakland Unified School District.

RELEVANT PROJECT LIST

- OUSD Fremont High School Modernization - Oakland
- OUSD Laurel Child Development Center - Oakland
- OUSD Melrose Leadership Academy (MLA) - Oakland
- OUSD California Children Services at Santa Fe Campus
- Bentley School renovations - Oakland
- Girls Inc. Historic Adaptive Reuse - Oakland
- Justin Siena Catholic High School - Napa
- Michelle Obama Elementary School - Richmond
- Seven Hills School renovations - Walnut Creek
- Tilden Environmental Education Center Study
- UC Davis Jess Jackson Self-Sustainable Winery Building
- Vincent Academy Adaptive Reuse - Oakland
- Jefferson High School Theater Expansion - Pacifica

DETAILED PROJECT EXPERIENCE

OUSD Laurel Child Development Center, Oakland

Jason designed this new 7,500 sf single-story structure which includes four pre-school classrooms with the capacity to house 108 pre-school children. Each classroom will be served by restrooms and teacher storage rooms. The project includes the CDC Principal's office, support admin space, staff workroom, conference room, parent resource room, kitchen, restrooms, custodial room, utility room, and storage. The design maximizes the use of natural lighting in the building.

OUSD Melrose Academy, Oakland



Jason is designing a new 10,500 sf, 2-story middle school building and renovation of the existing Maxwell Building, including a/v upgrades, new

mechanical systems, and seismic strengthening.

OUSD Fremont High School Modernization, Oakland



Jason is providing structural design for this modernization, supporting the removal and replacement of the

existing roofing for two buildings, existing portables, and an existing elevator in the Media Building.

Michelle Obama Elementary School, Richmond



Jason designed a brand new replacement campus in Richmond for West Contra Costa Unified School District.

Campus buildings include two new 2-story Learning Suites; a Multi-Purpose Student Hall; a Community Room; an Admin, Reception, and Library Building; a Kindergarten Building; and a Preschool Building for a total of over 50,000 sf of building area. He eliminated interior shear and bearing walls to maximize future flexibility.

OUSD CCS at Santa Fe Campus Renovation, Oakland

Jason designed improvements and foundations for portable buildings for California Children Services.



Billing Rates

Effective January 2025

HOURLY RATES	2025	2026	2027	2028
Principal	\$250 - \$325	\$265 - \$340	\$275 - \$360	\$290 - \$375
Associate/Structural Engineer	\$240 - \$270	\$250 - \$285	\$265 - \$300	\$290 - \$375
Civil Engineer	\$175 - \$230	\$184 - \$242	\$190 - \$255	\$200 - \$265
Structural Designer	\$140 - \$155	\$147 - \$163	\$155 - \$170	\$162 - \$180
BIM Manager	\$150	\$158	\$165	\$174
Revit Modeler	\$115 - \$135	\$121 - \$142	\$126 - \$150	\$133 - \$156
Administrative Staff	\$110 - \$125	\$115 - \$132	\$121 - \$138	\$127 - \$145

CITY OF OAKLAND



DALZIEL BUILDING • 250 FRANK H. OGAWA PLAZA, SUITE 3341 • OAKLAND, CALIFORNIA 94612

Department of Workplace and Employment Standards

(510) 238-3970
FAX (510) 238-3363
TDD (510) 238-2007

October 11, 2023

Maureen Kemiya
IDA Structural Engineers, Inc.
1629 TELEGRAPH AVE STE 300
OAKLAND, CA 94612

RE: Certification as a Small Local Business Enterprise (SLBE) with the City of Oakland's Local and Small Local Business Enterprise Program

Greetings Kemiya:

Congratulations! We are pleased to inform you that IDA Structural Engineers, Inc. has been certified as a Small Local Business Enterprise (SLBE) by the Department of Workplace and Employment Standards. The City of Oakland has established the L/SLBE Program in order to provide greater economic opportunities for its residents and businesses, to stimulate economic development, and to strengthen the Oakland economy.

This Small Local Business Enterprise (SLBE) certification is valid until August 31, 2025. After two years, your business is required to apply for recertification in order to remain certified with the City of Oakland provided your business continues to meet the eligibility criteria set forth in the City of Oakland's Local and Small Local Business Enterprise Program. Please review the L/SLBE Program (https://cao-94612.s3.amazonaws.com/documents/LSLBE-Program-Guidelines_Revised.5.4.21.pdf) to ensure your business maintains compliance with the program.

IDA Structural Engineers, Inc. will be listed in the City of Oakland's Directory of Local and Small Local Business Enterprises (L/SLBE) in the specialty area (s) listed on **page 2**. The Directory can be accessed via the internet at <https://oaklandca.diversitycompliance.com/>.

The following table lists the North American Industry Classification System (NAICS) Code (s) and description(s) that have been assigned to your company in accordance with the service(s) your firm render(s).



YEI Engineers, Inc. (YEI) has been providing mechanical, electrical, and plumbing services to both private and public sector clients since the company was established in July 1975. YEI currently employs a staff of 25 professional engineers, designers, CAD operators, and administrative personnel. Over 75% of our engineers are registered in electrical or mechanical engineering in the State of California.

YEI has completed projects that have included feasibility studies and master planning of electrical and mechanical systems; condition assessments; and topical studies of electrical and mechanical system problems. Our organization produces reports, plans, specifications, cost estimates, and complete construction documents for new and existing facilities.

Mechanical engineering services include: heating, ventilation, and air conditioning; fire protection; plumbing; building/plant/site utilities relocations; energy management and energy conservation; water treatment facilities; high and low pressure steam; hot and cooling water systems; and fuel supply systems including oil and gas.

Electrical engineering services include: substations; electrical systems analysis; indoor/outdoor lighting; high, medium, and low voltage electrical systems; uninterruptible power supplies; fire alarm systems; power distribution and transmission; power generation and cogeneration; and standby and emergency power.

YEI has provided design and construction support services for a number of unified school districts, community colleges, and universities. YEI has met and exceeded DSA, ADA, and CHPS/LEED requirements for the following educational projects.

Oakland Unified School District – Whittier Greenleaf Elementary School Modernization | (OUSD) Eleven Campuses Restroom Renovations MEP Services | Lowell Middle School Modernization and Health Clinic Renovation | Highland Elementary School and New Classroom Building Data Gathering and Fire Alarm System Design

San Leandro Unified School District - Garfield and James Monroe Elementary Schools Renovations Mechanical and Electrical

University of California, Berkeley - Campus Electrical System Upgrade and Hill Area Substation | Utility Master Planning | New Stanley Hall Utility Improvement | North West Quadrant Utility Upgrade for Li Ka Shing Medical Center |

West & Contra Costa Unified School District – Pinole Valley High Replacement of Receptacles, Communications and Score Board Control Electrical | Kennedy High School Track and Field Survey, Construction Document Administration Support Electrical

Fremont Unified School District –
Peralta Community College - Laney College Tower Swing Space Installation of Modular Buildings | Eagle Village Swing Space | Peralta College New Physical Plant and Administration Building Renovation

San Francisco Unified School District – Golden Gate Elementary School – Annex Building Proved Mechanical Condition Assessment | Creative Arts Charter School Mechanical and Plumbing Condition Assessment | Newcomer High School Mechanical and Plumbing Condition Assessment Report

Contra Costa Community College District - Electrical Distribution System Condition Assessment for Contra Costa, Diablo Valley, and Los Medanos College

San Jose Unified School District – Anne Darling Elementary School Modernization and New Construction

Berkeley Unified School District – B-Tech Modernization of Science Lab Classroom, Mechanical and Plumbing, design of all mechanical and plumbing systems for the building and site.

City College of San Francisco - Phelan Campus Statler Smith Hall (Registration Center) Renovation | John Adams Campus Gymnasium Seismic Retrofit and HVAC Renovation | San Francisco Fire Alarm System Replacement at Downtown Campus

Foothill Community College – 135 Utility and Technology Infrastructure Upgrades – Commissioning | Infrastructure Upgrade and Peer Review



HUBERT HIDALGO, PE
LEAD MECHANICAL ENGINEER

Mr. Hidalgo has 20 years of experience in Mechanical Engineering providing studies and detailed engineering design of HVAC, plumbing, fire protection and industrial engineering. He is experienced in project management and implementation of works on construction sites for HVAC, Plumbing, and Fire Protection systems in close coordination with other engineering trades. Additionally, his experience includes instrumented data gathering work for performance evaluation of heating, ventilation, and air-conditioning systems for existing various projects, his project experience also includes preparation of plans and technical specifications for various projects.



EDUCATION

BS Mechanical Engineering,
Polytechnic University of the
Philippines, 1992

REGISTRATION

CA Mechanical 38106

PROFESSIONAL AFFILIATIONS

US Green Building Council

YEARS OF EXPERIENCE

20 Years of Experience

20 Years with Current Firm

PROJECT EXPERIENCE

Oakland Unified School District

Eleven Campuses Restroom Renovations, [Oakland, CA](#)

Contra Costa County Community Service Department

Balboa Pre-School Center, Tenant Improvements and Additional
Restroom, [Richmond, CA](#)

Peralta Community College District

Physical Plant Building and Office Renovation, [Oakland, CA](#)

Oakland Unified School District

Whittier Greenleaf Elementary School Modernization,
[Oakland, CA](#)

Oakland Unified School District

Havenscourt Middle School Constructability Review,
[Oakland, CA](#)

Oakland Unified School District

Lowell Middle School Modernization, [Oakland, CA](#)

San Leandro School District

San Leandro Unified School District, Garfield and Monroe
Elementary Schools, [San Leandro, CA](#)

San Jose Unified School District

Plumbing Engineering and Plumbing Calculations for Anne Darling
Elementary School, [San Jose, CA](#)



JENNIFER HUYNH, PE
LEAD ELECTRICAL ENGINEER

Ms. Huynh has over 14 years of electrical design engineering experience with projects involving energy efficient lighting, and electrical distribution for City, County, State, Federal, Military, and Industrial projects. She also has experience with communication systems such as fire alarm, public address, and data systems design. Prepared technical engineering studies and design build request for proposals (DBRFP). Ms. Huynh is proficient in AutoCAD and Revit.



EDUCATION

BS Electrical Engineering,
University of California at Davis,
2007

REGISTRATION

CA Electrical 19697

PROFESSIONAL AFFILIATIONS

US Green Building Council

YEARS OF EXPERIENCE

15 Years of Experience
14 Years with Current Firm

PROJECT EXPERIENCE

Oakland Unified School District
Eleven Campuses Restroom Renovations, [Oakland, CA](#)

Contra Costa County Community Service Department
Balboa Pre-School Center, Tenant Improvements and Additional Restroom, [Richmond, CA](#)

Peralta Community College District
Physical Plant Building and Office Renovation, [Oakland, CA](#)

Oakland Unified School District
Whittier Greenleaf Elementary School Modernization,
[Oakland, CA](#)

Oakland Unified School District
Havenscourt Middle School Constructability Review,
[Oakland, CA](#)

Peralta Community College District
Laney College, Eagle Village Portable, [Oakland, CA](#)

Contra Costa Community College District
Electrical Distribution System Condition Assessment for Diablo Valley, and Los Medanos College, [East Bay, CA](#)

Oakland Unified School District
HINTIL KUU CA Children's Development Center on site at Carl B. Munck Elementary School, [Oakland, CA](#)

Oakland Unified School District, Highland Elementary School
New Classroom Building, [Oakland, CA](#)

Oakland Unified School District
Kaiser Early Childhood Center, [Oakland, CA](#)



RATE SCHEDULE* (2025) +
ELECTRICAL AND MECHANICAL ENGINEERING SERVICES

1. Principal	\$299.00/hr.
2. Project/Lead Engineer	\$287.00/hr.
3. Senior Engineer	\$258.00/hr.
4. Engineer	\$239.00/hr.
5. Design Engineer	\$224.00/hr.
6. AutoCAD/Draftsperson	\$147.00/hr.
7. Administrative Support	\$ 103.00/hr.
8. Travel Time is reimbursable up to a maximum of 8 hours per day.	
9. Reimbursable Expenses:	
Photocopies 8-1/2" x 11"	\$ 1.50 ea
Photocopies 11" x 17	\$ 3.00 ea
Laser Bond Plot (up to 22" x 34")	\$ 12.00 ea
Laser Bond Plot (up to 30" x 42")	\$ 20.00 ea
Laser AutoCAD Vellum Plots (up to 22" x 34")	\$ 30.00 ea
Laser AutoCAD Vellum Plots (up to 30" x 34")	\$ 40.00 ea
Company/Employee Automobile	\$.67/mi
Computer (AutoCAD & Engineering Stations)	\$ 110.00/hr.
10. Outside Services and Equipment:	
Note: Cost based on actual cost plus 10% administrative charge	
Air Fare	
Car Rental	
Lodging, Meals and Miscellaneous	
Travel Expenses	
Reproduction Firms' Charges	
Long Distance and Cellular Phone Calls	
Express Mail	
Outside Consultant Services (Subconsultant)	

* Rate Schedule includes overhead costs and profit.

+Billing rates will be adjusted annually per CPI after 2025 and thereafter.

CaliChi Design Group Firm Profile

INTRODUCTION

We have an extensive portfolio in the K-14 market over the last 20 years and have a proven DSA track record of successful design, plan, and review services. Our portfolio includes numerous public and private educational clients, including OUSD, covering both renovation and new construction projects and have extensive experience working within occupied campuses during phased construction. We approach every project holistically and believe we are in this as a cohesive team and maintain a vested interest in successful projects outcomes and dedicated focus on opening projects on time and under budget. ***A key strength is that we understand the capital improvement and District process, are knowledgeable of the statutes and regulations for building and site design ADA compliance and are proud of our successful track record with DSA working within project schedules and deadlines.***

.

We offer up the following DSA reference for verification of our track record for OUSD and other local projects:

Romella Edgmon RA, RN, PHN, BSN, RWJF
Associate Architect/Access Compliance

Division of the State Architect – Oakland Regional Office
State of California, Department of General Services
1515 Clay Street, Suite 1201, Oakland, Ca 94612
www.dgs.ca.gov/dsa

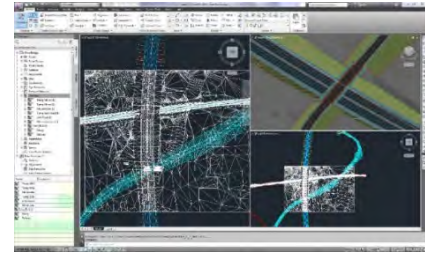
Phone: 510.622.5624
Fac: 510.622.3140
Email: romella.edgmon@dgs.ca.gov

Additionally, we understand and can easily navigate the OPSC process and routinely work through the State Fire Marshall on both education and municipal projects. We are members of, and have held, leadership roles in CASH (Coalition of Adequate School Housing, SCUP (Society for College and University Planners, and CCFC (Community Colleges Facility Consortium) and routinely inform our educational and industry clientele on trends and new technologies to enhance site design, ADA accessibility, erosion control, and storm water management methodologies.

We routinely assist Districts in assessing conditions, site planning, entitlements and planning approvals, erosion control and bioswale design storm water management and treatments, storm water pollution prevention plans, utility coordination, and site and infrastructures upgrades to Title 24 accessibility codes. We understand both the capital improvement and District decision processes and have a proven DSA track record.

We pride ourselves on the Partnered Business Approach. We become your allies and partners throughout the life of your project(s).

Our Process is Different! Most civil engineers utilize a 2-D CAD file and base input on the architectural model snapshot. We actively participate in the BIM process. We take the Revit file, insert into our Civil 3D model, complete the generation of 3-D surfaces and pipe networks, export into Infraworks and Navisworks model and then provide both back to the architect enabling an enhanced experience for both owner and design team and saving time and money on a given project by eliminating the need for multiple RFI's and identifying design issues early.



When you choose CaliChi as your consultant, you are choosing people who not only offer technical and hands-on experience with similar projects to those within the District, but those who are dedicated to committing maximum effort and resources as necessary to make your project(s) a success.

We are committed to a high standard of quality and responsiveness.

We know how frustrating it can be to have a need that goes unmet, or an email or phone call that goes unanswered. We typically answer the phone when you call and respond to emails within 3 hours regardless of time or day. Holding true to one of CaliChi's founding ideals; both founding principals are involved in every project that we work on.



In addition to our track record with DSA, CaliChi has worked with numerous public agencies and municipalities in California and across the nation. Our proposed staff for these projects come from a municipal background and bring that perspective to the table.

Even though our broad portfolio includes a diverse book of municipal, educational, and retail projects and we have received high marks from clients, contractors, and many players on the development/owner sides, we have received the highest praise from those sitting on the other side of the review counters; the municipal staff that has reviewed, approved and permitted CaliChi's projects over the last fifteen years.

We are a full-service civil engineering firm with offices in Oakland, Hawaii, and Hood River, Oregon. We are certified as a local or very small business enterprise with the following agencies and can help meet any small business set aside.

We are certified through:

City of Oakland
County of Alameda
Port of Oakland

Representative K-14 Projects

- Fremont High School New Campus Modernization, Oakland, CA
- Calvin Simmons Elementary Modernization, Oakland, CA
- Niohomachi Little Friends School, San Francisco, CA
- Accalanes Union High School District Modernization, Walnut Creek, CA
- Cesar Chavez Elementary Modernization, San Francisco, CA
- Fusselman Hall, College of Marin, Kentfield, CA
- Kipp Bridge Academy, Oakland, CA

Project of note:

Fremont High School Net-Zero Campus, OUSD

Award Recipient for 2022 ENR Awards for K-12 Project

Civil engineers of record for this high-profile redevelopment project for Oakland UHSD included the demolition of approximately 95% of the existing 12-acre urban campus and construction of 9 buildings totaling approximately 190,000 sf. of expansion will add 24,000 sq. ft. of additional space.

The project also included a regulation football and soccer all-weather field and running track. The project is a PG&E Net Zero Energy (NZE) campus where energy generation and use are balanced. Civil scope of work includes the design of mainline utility relocations and on-site utility service infrastructure for water, sewer, storm, gas, data, and electric; grading and drainage including up to 40-foot tall retaining walls around the backside of the proposed football field; full C.3 and Title 24 stormwater management, treatment, and maintenance; and public right-of-way encroachment improvement plans.

Additional OUSD Projects:

Garfield Elementary School Modernization, OUSD

Design Build renovation and new construction of a two-story building on an adjacent campus. Services included topographic survey, utilities, paving and grading and drainage plan.

Sunnyvale School District, Sunnyvale Middle School

Two new two-story classroom buildings will address the school's need for modern, flexible, and sustainable spaces. The two new buildings will add a total of 23 adaptable classrooms, five student breakout spaces, an art classroom, a dedicated teacher collaboration space and a landscaped courtyard to the campus. Additional sustainable features include bioretention basins to capture and filter stormwater runoff, as well as solar panels.

Living in Schoolyards, OUSD

In depth assessment of 4 schools to document existing Conditions, identifying outdoor living space, civil engineering services for water use enhancement, Storm Water, Erosion Control and Sustainable Measures.

Current OUSD Projects:

- **Facilities Masterplan, OUSD**
- **Field Assessments, OUSD**
- **Kaiser Elementary School, OUSD**

Reco V. Prianto

PE, QSD+QSP, LEED AP | CIVIL ENGINEER



EDUCATION

Bachelor of Science, Civil Engineer
Colorado School of Mines
Golden, Colorado

ASSOCIATIONS

Energy and Environmental Design (LEED)
Accredited Professional

Qualified SWPPP Developer (QSD) and
Qualified SWPPP Practitioner (QSP)

California Governor's Office of Emergency
Services Natural Disaster Safety
Assessment Certified

RECON Real Estate and Construction
Networking Non-Profit

CASH (Coalition for Adequate School
Housing) Maintenance Committee

REGISTRATION

Reco Prianto
Licensed Civil Engineer
California 69670
Exp. 6/30/2026

Reco has 22 years of progressive experience working on a variety of projects for the Oakland Unified School District and other K-14 school upgrades and development, university development, and community college bond program implementation. He is the CEO and Founding Principal of CaliChi Design Group (CDG) and has strong leadership skills; overseeing both operations and the design process. He has a proven track record with DSA, and has extensive experience working on occupied campuses during phased construction.

Oakland Unified School District

- **Garfield Elementary School Modernization**
Design-Build renovation and new construction of a two-story building on an adjacent campus. Services included topographic survey utility, paving, and a grading and drainage plan.
- **Calvin Simmons Elementary Modernization**
Design and construction of a new 25,000 sf two-story science classroom building, artificial turf, an all-weather athletic field, and associated site and infrastructure upgrades. The project included the relocation of an abandoned sewer underneath the building.
- **Calvin Simmons Middle School & Life Academy**
Design and construction of a new two-story Career Technical Science Building. The project includes upgrades to buildings and the addition of soccer field, basketball courts, and running track. Civil services included topographic and boundary survey.

Itliong Vera Cruz Middle School (Design-Build)

New Haven Unified School District
Replacement of two portable classrooms with a new single-story, 1,485 sf building with 438 canopy classrooms. The project included DSA review assistance and construction phase review.

César Chávez Elementary School Modernization

San Francisco Unified School District
Renovation and addition of a 49,000 sf school building and upgrade to the playground and site area. Provided topographic survey; utility infrastructure relocations, and associated site and infrastructure upgrades to the current Title 24 accessibility codes.

Nihonmachi Little Friends Preschool

San Francisco Unified School District
Providing survey, mapping, and civil design services for a private pre-school including public right-of-way encroachment improvement plans.

Additional Reco Prianto OUSD Projects:

Project of note:

Fremont High School Net-Zero Campus, OUSD

Award Recipient for 2022 ENR Awards for K-12 Project

Civil engineers of record for this high-profile redevelopment project for Oakland UHSD included the demolition of approximately 95% of the existing 12-acre urban campus and construction of 9 buildings totaling approximately 190,000 sf. of expansion will add 24,000 sq. ft. of additional space.

The project also included a regulation football and soccer all-weather field and running track. The project is a PG&E Net Zero Energy (NZE) campus where energy generation and use are balanced. Civil scope of work includes the design of mainline utility relocations and on-site utility service infrastructure for water, sewer, storm, gas, data, and electric; grading and drainage including up to 40-foot tall retaining walls around the backside of the proposed football field; full C.3 and Title 24 stormwater management, treatment, and maintenance; and public right-of-way encroachment improvement plans.

Garfield Elementary School Modernization, OUSD

Design Build renovation and new construction of a two-story building on an adjacent campus. Services included topographic survey, utilities, paving and grading and drainage plan.

Sunnyvale School District, Sunnyvale Middle School

Two new two-story classroom buildings will address the school's need for modern, flexible, and sustainable spaces. The two new buildings will add a total of 23 adaptable classrooms, five student breakout spaces, an art classroom, a dedicated teacher collaboration space and a landscaped courtyard to the campus. Additional sustainable features include bioretention basins to capture and filter stormwater runoff, as well as solar panels.

Living Schoolyards, OUSD

In depth assessment of 4 schools to document existing Conditions, identifying outdoor living space, civil engineering services for water use enhancement, Storm Water, Erosion Control and Sustainable Measures.

OUSD Masterplan

Performed architectural school condition assessment for roughly 55 schools in the OUSD system.

OUSD Field Assessment

Field assessments for the following schools: McClymonds High School, East Oakland Pride, Life Academy School

Living Schoolyards Surveys / analysis for the following schools: Horace Mann ES, Madison Park, Frick United, Elmhurst, Brookfield ES, Life Academy

OUSD Kaiser Elementary School

The Project consists of the renovation of the existing OUSD Kaiser Elementary School site at the above-referenced address. The project includes the following scope items: •Demolition of the existing play area and all play structures. Existing shade structures to remain.

Remove and replace AC paving adjacent to school site, between building and berm to play yard. Remove AC paving and install new turf in play yard. Determine if intrusion, fire alarm, and surveillance camera systems are needed, or need to be upgraded. Architect to conduct assessment against district standards. Coordination of a new ramp from school site to playground level. Provide assistance to a separate consultant for the new ramp as required. Construct site improvements to provide an outdoor learning/play environment to the existing play area, play structure(s), landscaping, and level play area(s) at Kaiser Elementary School. Coordination of Building & Grounds (B&G) scope of work to the Project. B&G will paint the building exterior, repair damaged wood trim at the building eaves, and conduct tree trimming.



CALICHI DESIGN GROUP

3206 Hannah Street #3
Oakland, CA 94608
(510) 250-7877
www.CaliChi.com

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CaliChi Design Group Standard Rate Schedule

Effective: January 1, 2024 - December 31, 2025

Classification	Labor Rate per Hour
Principal	\$245
Project Manager	\$195
Project Engineer	\$155
Designer	\$125
Administrative / Accounting	\$ 70

Direct reimbursable costs, such as sub-consultants, outside duplication, overnight mail, mileage, etc., will be billed at cost plus 10%.

Rates listed above shall include an annual escalation of 3% annually.

Firm Information + Qualifications

We are the global leader in safety, security and risk-based engineering and consulting. Serving communities worldwide, our fire protection engineers, technical experts, architects and consultants are dedicated to making your projects successful. Fire and life safety are pivotal considerations in today's educational buildings. The integration of fire alarm systems with fire protection, life safety, security, and other building systems for new construction and renovation projects is essential for safety, property protection and code compliance.

Designing effective, efficient, and code-compliant fire/life safety systems requires a thorough knowledge of the codes and standards that govern the applicable fire/life safety systems, as well as the intent behind these codes and standards. As fire and life safety leaders, we're actively involved in the development process for many of the codes and standards. We participate in the National Fire Protection Association (NFPA) committees responsible for the development of the fire/life safety codes and standards, including NFPA 72, *National Fire Alarm and Signaling Code*. We have supported DSA's Fire and Life Safety Compliance goals for 30+ years. Our services for DSA have included reviewing school projects for compliance with the California Building and Fire Code requirements. Through our experience with DSA standards and operations, along with involvement with committees and organizations, we understand the relevant codes, standards, and regulations for all education facility types. We are able to design and implement designs that meet the requirements of applicable codes, and local ordinances and policies, that help expedite the approval process so project schedules and costs can be met.

The Oakland Unified School District (District) has trusted Jensen Hughes as the preferred fire/life safety design consulting service provider for 20+ years.

Since 2004, Jensen Hughes has been a trusted partner supporting the Oakland Unified School District with fire alarm, intrusion alarm and fire sprinkler systems design and review services, along with bid and construction administration services for new and renovation projects in the District's K-12 schools and facilities. We have also guided the development of the District's Standards for fire alarm, intrusion alarm, and fire sprinkler systems used for all District projects. We update these Standards periodically in response to vendor material changes and lessons learned.

We work directly with OUSD staff and are intimately familiar with their policies and procedures. We have a long-term relationship with the Division of the State Architect and the Oakland Fire Department which has helped us expedite jurisdictional coordination and the approval process. These successful working relationships will be an asset for each Architectural Services task assignment under this contract. We collaborate seamlessly to provide valuable insights and resolve issues early in the design and planning phases. By championing best practices, setting industry standards, and delivering innovative solutions, we not only ensure project success but also make a positive impact on the communities we serve.

Relevant Experience

Oakland Unified School District (OUSD)

Oakland, CA

Fire Alarm, Intrusion Alarm, and Fire Sprinkler Systems Design, Bid and Construction Administration Services

Jensen Hughes has been working with the OUSD since 2004. OUSD is a public education district that operates approximately 120 sites, including administration sites; child development centers (CDC); elementary, middle and high schools; alternative schools; charter schools; and adult education centers.

Jensen Hughes serves as the main fire protection consultant for OUSD. We provide a streamlined approach for fire alarm, intrusion alarm, and fire sprinkler consulting with expert knowledge about the fire codes, DSA standards and District standards. Our team provides system design and bid and construction administration services for new and renovation projects in the District's K-12 schools and facilities. Our experience with DSA standards and operations helps expedite the approval process to meet project schedules. **We also developed the District Standards for fire alarm, intrusion alarm, and fire sprinkler systems for use by architects, consultants and contractors for all District schools and facilities.** These Standards have helped the District receive better installations, fewer design issues, and overall better-managed projects, thus saving the District time and money. Updates to these Standards occur regularly through bulletins as needed or in their entirety. A sampling of our completed and ongoing projects within the last 3 years includes the following:

Elementary Schools

- + East Oakland Pride ES
- + Emerson ES
- + Garfield ES
- + Martin Luther King, Jr ES

High Schools

- + Castlemont HS
- + Coliseum College Prep Academy
- + Fremont HS
- + McClymond HS
- + Oakland International HS
- + Skyline HS

Middle Schools

- + Claremont MS
- + Community School for Creative Education
- + Roosevelt MS
- + Urban Promise Academy
- + Westlake MS

Child Development Centers and Other Facilities

- + Bella Vista CDC
- + Child Care Services Medical Therapy Unit @ Santa Fe
- + Hintil Kuu Ca CDC
- + Laurel CDC
- + 955 High Street, B&G Facilities
- + Central Admin Center @ Cole ES

Client/Owner Contact: Oakland Unified School District (OUSD), John Esposito,
P: +1 510 535 7049, E: john.esposito@ousd.org

Team Member Lead: Manuelita David, SET

Construction Dollar Value: Various per project

Our Service Line Team Leads

Our team members have the availability, along with a support network of engineers and consultants, to provide services for all projects assigned under this contract. Our service line team leaders are provided below.



Experience
37 years

MANUELITA DAVID, SET

Project Role: Project Manager + Fire Alarm Consultant

Mannie has provided fire alarm expertise to the District for over 20 years. As Project Manager, Mannie will be responsible for the project delivery, including scheduling, project planning, budgets, day-to-day oversight of our project team, providing guidance and support for DSA processes, and facilitating information flow between Jensen Hughes and Gelfand Partners Architects.

Relevant Experience:

- + OUSD District-wide Fire and Intrusion Alarm System Design and Consulting
 - + OUSD Fire Alarm and Intrusion Alarm District Standards Development & Maintenance
-



Experience
8 years

MATISEN ANDERS SHAEFFER, PE, PMP

Project Role: Fire/Life Safety Consultant

Matisen will focus on the application of life safety codes, including NFPA, IBC, and California Building Codes. She specializes in code compliance review, egress analysis, alternative design requests, property condition assessments, life safety code assessment surveys, and engineering calculations for system design. She will identify design deficiencies and guide the team to mitigate issues.

Relevant Experience:

- + Mission Bay School, San Francisco, CA
 - + Lone Tree School, Brentwood, CA
 - + Martin Luther King Jr. Elementary School, Oakland, CA
-



Experience
16 years

ROBERT BURTT, PE

Project Role: Fire Sprinkler Consultant

Robert will support the project team with design, review and consulting services for the fire sprinkler systems. He will conduct site visits, verify existing fire sprinkler system device locations, provide review for code compliance, and prepare design drawings and product specifications following all District design standards.

Relevant Experience:

- + 955 High Street, Oakland, CA
 - + Roosevelt Middle School, Oakland, CA
 - + OUSD Fire Sprinkler District Standards Development & Maintenance
-



Experience
35 years

MATTHEW "MATT" HARPER, RCDD

Project Role: Security Consultant

Matt's role as Security Consultant will include design and review of intrusion alarm systems. He will conduct site visits, verify device locations of existing intrusion alarm systems and prepare design drawings and product specifications following all District design standards and industry best practice requirements

Relevant Experience:

- + Roosevelt Middle School, Oakland, CA
 - + Amesbury Elementary, Amesbury, MA
 - + Newton Countryside Elementary School, Newton Highlands, MA
-

Billing Rate Schedule

Billing rates will be based on the following schedule. Billing rates states herein are valid through December 31, 2025. Billing rates for services beyond this date will be reviewed and negotiated as appropriate.

Labor Category	Hourly Rates
Technical Fellow	Varies
Senior Consultant	\$300 - \$360
Consultant	\$235 - \$280
Associate	\$170 - \$215
Technician / Intern	\$120
Project Administrator	\$135
Administrator	\$110
Confidential and Proprietary.	

LOCAL BUSINESS UTILIZATION AFFIRMATION WORKSHEET

Firm or Team: GELFAND PARTNERS ARCHITECTS

Our Firm or Team affirms that it will achieve OUSD's minimum Local Business Utilization (LBU) requirements. Included in our Statement of Qualifications is a detailed narrative and strategy describing how the Firm or Team intends to meet or exceed the District's LBU requirements.

The narrative shall describe previously implemented methods used for successful local business utilization and shall be inclusive of at least three (3) project relevant California K-12 examples.


The narrative includes our LBU strategy, but not limited, to the following:

- **Category 1:** An outline of small and local firms (by professional service discipline) with planned partnership/JV Partnership
- **Category 2:** Other identified opportunities for local and small local utilization; Expressed Plan/Strategies to Increase LBP
- **Category 3:** Areas and/or scopes that have been identified as carve out opportunities for small, local partners
- **Category 4:** Relevant California K-12 project examples
- **Category 5:** Previously implemented methods used for successful Local Business Utilization

We understand that the submitted narrative and strategy will be scored and awarded up to 5 additional points by the District's LBU Consultant for incorporation into the SOQ evaluations.

Minimum Local Business Participation per District Policy can be found in the following link:

<https://www.ousd.org/facilities-planning-management/opportunities/lbu-policy>

Signature:  _____

Date: 5 / 7 / 2025

LOCAL BUSINESS UTILIZATION NARRATIVE

Gelfand Partners Architects is fully committed to meeting and exceeding OUSD's minimum Local Business Utilization requirements for all future projects, including those valued at \$10 million and under. Our firm has a proven track record of successfully partnering with local businesses in Oakland and the broader Bay Area, which not only fulfills LBU goals but also enhances project outcomes through local expertise and community connection. We view LBU not just as a requirement, but as an integral part of our project approach that strengthens our designs and benefits the communities we serve.

Our experience partnering with local Oakland businesses has proven successful across multiple projects, offering numerous advantages that enhance our work and benefit the community:

Local Expertise: Oakland-based firms like IDA Structural Engineers, CaliChi Civil Engineering, and YEI for MEP bring in-depth knowledge of environmental conditions and technical needs. This expertise has been crucial in navigating project-specific challenges, particularly in our work on Kaiser Elementary School.

Rapid Response and Accessibility: The proximity of our local partners allows for quick site visits, impromptu meetings, and faster problem-solving. This was especially beneficial during the

Washington High School project in San Francisco, where complex structural and MEP challenges required frequent collaboration.

Community Integration: Working with local businesses strengthens our connection to the community we're serving. This has led to designs that are more responsive to local needs and values, as seen in our Greenleaf @ Whittier TK-8 school project in Oakland.

Economic Impact: By partnering with Oakland-based firms, we contribute directly to the local economy, supporting job creation and business growth within the community.

Streamlined Communication: Shared local context and cultural understanding with our Oakland partners have resulted in smoother communication and more efficient project execution.

Our ongoing collaborations with local firms have built strong, trust-based relationships that improve with each project, leading to increasingly seamless teamwork and better outcomes for OUSD.

**Refer to 2.2.5. Project Examples for Kaiser Elementary, Washington H.S. and Greenleaf @ Whittier TK-8. All utilizing LBU consultants.*



Kaiser Elementary, Oakland



DIVISION OF FACILITIES PLANNING AND MANAGEMENT ROUTING FORM

Project Information

Project Name	Architectural MAS Construction- Projects Budget Under Ten Million Dollars	Site	
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Basic Directions

Services cannot be provided until the contract is awarded by the Board or is entered by the Superintendent pursuant to authority delegated by the Board.

Attachment Checklist	<input checked="" type="checkbox"/> Proof of general liability insurance, including certificates and endorsements, if contract is over \$15,000 <input checked="" type="checkbox"/> Workers compensation insurance certification, unless vendor is a sole provider
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Contractor Information

Contractor Name	Gelfand Partners Architects	Agency's Contact		Lary Schadt			
OUSD Vendor ID #	001809	Title		Principal			
Street Address	165 10 th Street, Ste. 100	City	San Francisco	State	CA	Zip	94103
Telephone	415-346-4040	Policy Expires					
Contractor History	Previously been an OUSD contractor? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		Worked as an OUSD employee? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
OUSD Project #	25040						

Term of Original/Amended Contract

Date Work Will Begin (i.e., effective date of contract)	06-26-2025	Date Work Will End By (not more than 5 years from start date; for construction contracts, enter planned completion date)	6-30-2028
		New Date of Contract End (If Any)	

Compensation/Revised Compensation

If New Contract, Total Contract Price (Lump Sum)	\$	If New Contract, Total Contract Price (Not To Exceed)	\$0.00
Pay Rate Per Hour (If Hourly)	\$	If Amendment, Change in Price	\$
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
9657/9000	Fund 21 Measure Y		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.	Executive Director of Facilities				
	Signature	Date Approved			
2.	General Counsel, Department of Facilities Planning and Management				
	Signature <i>James Traber</i>	Date Approved	05/27/2025		
3.	Chief Systems & Services Officer				
	Signature <i>Preston Thomas</i>	Date Approved	05/28/2025		
	Chief Financial Officer				
4.	Signature	Date Approved			
	President, Board of Education				
5.	Signature	Date Approved			