AGREEMENT FOR MASTER PLANNING SERVICES BETWEEN ALAMEDA UNIFIED SCHOOL DISTRICT AND QUATTROCCHI KWOK ARCHITECTS, INC.

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AGREEMENT FOR MASTER PLANNING SERVICES

This Agreement for Master Planning Services ("Agreement") is made as of the <u>22 day of September, 2013</u>, between the **Alameda Unified School District** ("District") and **Quattrocchi Kwok Architects, Inc.** ("Consultant") (collectively, the "Parties"), related to the planning and construction of additions to existing school sites, modernization / reconstruction / renovation of existing schools and district facilities and new school construction ("Program").

The Program may include multiple components. Any one of the components or combination thereof may be changed, including terminated, in the same manner as the Program, as indicated herein, without changing in any way the remaining component(s). The provisions of this Agreement shall apply to each component without regard to the status of the remaining component(s). Consultant shall invoice for each component separately and District shall compensate Consultant for each component separately on a proportionate basis based on the level and scope of work completed for each component.

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

Article 1. DEFINITIONS

- 1.1. In addition to the definitions above, the following definitions for words or phrases shall apply when used in this Agreement, including all Exhibits:
 - 1.1.1. <u>Agreement</u>: The Agreement consists exclusively of this document and all identified exhibits attached and incorporated by reference.
 - 1.1.2. <u>Consultant</u>: The entity listed in the first paragraph of this Agreement, including all Consultant(s) to the Consultant.
 - 1.1.3. <u>Consultant(s) or subconsultant(s)</u>: Any and all consultant(s), subconsultant(s), subcontractor(s), or agent(s) to the Consultant.
 - 1.1.4. <u>Design Team</u>: The architect(s), engineer(s), and other designer(s) that the District designates as designing all or a portion of a project, including all consultants to the architect(s), engineer(s) or other designer(s), who have a responsibility to the District to design all or a portion of that project either directly or as a subconsultant or subcontractor.
 - 1.1.5. Extra Services: Extra Services are defined in Article 7 and Exhibit "B."
 - 1.1.6. <u>Fee</u>: The Consultant's Fee is defined herein, payable as set forth herein and in **Exhibit** "B."
 - 1.1.7. <u>Service(s)</u>: All labor, materials, supervision, services, tasks, and work that the Consultant is required to perform and that are required by, or reasonably inferred from, the Agreement, and that are necessary for the design and completion of the Program.

Article 2. SCOPE, RESPONSIBILITIES AND SERVICES OF CONSULTANT

- 2.1. <u>Scope</u>: Consultant shall provide the Services described herein and under **Exhibit "A"** for the Program.
- 2.2. <u>Coordination</u>: In the performance of Consultant's Services under this Agreement, Consultant agrees that it will maintain such coordination with District personnel and/or its designated representatives as may be requested and desirable. This shall include, without limitation,

coordination with all members of the District's Design Team, construction managers, or other similar consultants.

2.3. <u>Consultant's Services</u>: Consultant shall act as the District's agent to render the Services and furnish the work as described in **Exhibit "A,"** which will commence upon the receipt of a Notice to Proceed signed by the District representative. Consultant's services will be completed in accordance with the schedule attached as **Exhibit "C."**

Article 3. CONSULTANT STAFF

- 3.1. The Consultant has been selected to perform the Services herein because of the skills and expertise of key individuals.
- 3.2. The Consultant agrees that the following key people in Consultant's firm shall be associated with the Services in the following capacities:

Job Title	<u>Name</u>	
Principal In Charge	Mark Quattrocchi	
Senior Associate	Stan Clark	
Project Architect	Nick Stephenson	
Project Architect	Jim Rolfe	,

- 3.3. The Consultant shall not change any of the key personnel listed above without prior written approval by District, unless said personnel cease to be employed by Consultant. In either case, District shall be allowed to interview and approve replacement personnel.
- 3.4. If any designated lead or key person fails to perform to the satisfaction of the District, then upon written notice the Consultant shall immediately remove that person from the Program and provide a temporary replacement. Consultant shall within seven (7) days provide a permanent replacement person acceptable to the District. All lead or key personnel for any Consultant must also be designated by the consultant and are subject to all conditions previously stated in this paragraph.
- 3.5. Consultant represents that the Consultant has no existing interest and will not acquire any interest, direct or indirect, which could conflict in any manner or degree with the performance of services required under this Agreement and that no person having any such interest shall be employed by Consultant.

Article 4. SCHEDULE OF SERVICES

The Consultant shall commence Services under this Agreement upon receipt of a Notice to Proceed, and shall prosecute the Services diligently as described in **Exhibit "A"** in accordance with the schedule attached as **Exhibit "C."** Time is of the essence and failure of Consultant to perform Services on time as specified in this Agreement is a material breach of this Agreement.

Article 5. TERM

Unless terminated or otherwise cancelled as permitted herein, the term of this Agreement shall be for the following:

From October 2013, to July 2014

Article 6. FEE AND METHOD OF PAYMENT

6.1. District shall pay Consultant

An amount equal to two hundred thirty eight thousand five hundred dollars (\$238,500) as described in attached **Exhibit "E"** – QKA Proposal letter dated 10/14/2013.

for all services contracted for under this Agreement and based on the provisions and Fee Schedule attached to **Exhibit "B" and "E"**.

6.2. The Consultant's Fee set forth in this Agreement shall be full compensation for all of Consultant's Services incurred in the performance hereof as indicated in **Exhibit "B" and "E".**

Article 7. PAYMENT FOR EXTRA SERVICES

- 7.1. District-authorized Services outside of the scope in **Exhibit "A"** or District-authorized reimbursables not included in Consultant's Fee are "Extra Services." Any charges for Extra Services shall be paid by the District as described in **Exhibit "B"** only upon certification that the claimed Extra Services were authorized in writing in advance by the District and that the Extra Services have been satisfactorily completed.
- 7.2. A written proposal describing the proposed scope of services and listing the personnel, labor duration, rates, and cost shall be submitted by the Consultant to the District for written approval before proceeding with any Extra Services.

Article 8. OWNERSHIP OF DATA

After completion of the Services or after termination of this Agreement, Consultant shall deliver to District a complete set of the planning records, including without limitation all documents generated by Consultant and copies of all documents exchanged with or copied to or from all other planning participants. All records shall be indexed and appropriately organized for easy use by District personnel. All records are property of the District, whether or not those records are in the Consultant's possession.

Article 9. TERMINATION OF AGREEMENT

- 9.1. If Consultant fails to perform Consultant's duties to the satisfaction of the District, or if Consultant fails to fulfill in a timely and professional manner Consultant's material obligations under this Agreement, or if Consultant violates any of the material terms or provisions of this Agreement, the District shall have the right to terminate this Agreement effective immediately upon the District giving written notice thereof to the Consultant. In the event of a termination pursuant to this subdivision, Consultant may invoice District for all Services performed until the notice of termination, but District shall have the right to withhold payment and deduct any amounts equal to the District's costs because of Consultant's actions, errors, or omissions that caused the District to terminate the Consultant.
- 9.2. District shall have the right in its sole discretion to terminate the Agreement, all of the Services, or a portion of the Services, for its own convenience. The Consultant, upon written notice from the District of such termination, shall immediately cease performing the Services as indicated in that notice. In the event of a termination for convenience, Consultant may invoice District and District shall pay all undisputed invoice(s) for Services performed until the notice of termination. This shall be the only amount(s) potentially owing to Consultant if there is a termination for convenience.
- 9.3. The Consultant has the right to terminate this Agreement if the District does not fulfill its material obligations under this Agreement and fails to cure such material default within sixty (60) days, or if the default cannot be cured within sixty (60) days, commence to cure such default, diligently pursue such cure, and complete the cure within a reasonable time following written notice and demand from Consultant. Such termination shall be effective after receipt of written notice from Consultant to the District.
- 9.4. Except as indicated in this Article, termination shall have no effect upon any of the rights and obligations of the Parties arising out of any transaction occurring prior to the effective date of such termination.

Article 10. INDEMNITY

- 10.1. To the furthest extent permitted by California law, Consultant shall defend, indemnify and hold free and harmless the District, its agents, representative, officers, consultants, employees, trustees, and volunteers (the "indemnified parties") from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury of any kind, in law or equity ("Claims"), to property or persons, including personal injury and/or death, directly or indirectly arising out of, connected with, or resulting from the performance of the Services or this Agreement unless a Claim is caused by the sole negligence or sole willful misconduct of the indemnified parties.
- 10.2. Consultant shall pay and satisfy any judgment, award or decree that may be rendered against the indemnified parties in any Claim. Consultant shall also reimburse District for the cost of any settlement paid by District arising out of any Claim. Consultant shall reimburse the indemnified parties for any and all legal expenses and costs, including attorneys' fees, expert witness fees and consultant fees, incurred by each of them in connection therewith or in enforcing the indemnity herein provided to the extent caused by the above agreement to indemnify. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by the indemnified parties. District shall have the right to accept or reject any legal representation that Consultant proposes to defend the indemnified parties.

Article 11. FINGERPRINTING AND BEHAVIOR

- Unless the District has determined pursuant to Education Code section 45125.2 that on the basis 11.1. of scope of Services in this Agreement that Consultant and its subcontractors and employees will have only limited contact with pupils, the Consultant shall comply with the provisions of Education Code section 45125.01 regarding the submission of employee fingerprints to the California Department of Justice and the completion of criminal background investigations of its employees. The Consultant shall not permit any employee to have any contact with District pupils until such time as the Consultant has verified in writing to the governing board of the District that the employee has not been convicted of a felony, as defined in Education Code section 45122.1. The Consultant's responsibility shall extend to all employees, agents, and employees or agents of its subcontracts regardless of whether those individuals are paid or unpaid, concurrently employed by the District, or acting as independent contractors of the Consultant. Verification of compliance with this section and the Criminal Background Investigation Certification (Exhibit "E") shall be provided in writing to the District prior to each individual's commencement of employment or participation on the Program and prior to permitting contact with any student.
- 11.2. No drugs, alcohol and/or smoking are allowed at any time in any buildings and/or grounds on District property. No students, staff, visitors, or contractors are to use drugs on these sites.
- 11.3. Unacceptable and/or loud language will not be tolerated. Derogatory language toward students, staff, visitors or the public will not be allowed.

Article 12. RESPONSIBILITIES OF THE DISTRICT

- 12.1. The District shall examine the documents submitted by the Consultant and shall render decisions so as to avoid unreasonable delay in the process of the Consultant's services.
- 12.2. The District shall provide to the Consultant complete information regarding the District's requirements for the Program.
- 12.3. The District shall designate an officer, employee and/or other authorized representatives to act on the District's behalf with respect to the Program. The District's representative for the Program shall be available during working hours and as often as may be required to render decisions and to furnish information in a timely manner.

Article 13. LIABILITY OF DISTRICT

- 13.1. Other than as provided in this Agreement, District's obligations under this Agreement shall be limited to the payment of the compensation provided in this Agreement. Notwithstanding any other provision of this Agreement, in no event shall District be liable, regardless of whether any claim is based on contract or tort, for any special, consequential, indirect or incidental damages, including, but not limited to, lost profits or revenue, arising out of or in connection with this Agreement for the services performed in connection with this Agreement.
- 13.2. Any and all costs incurred by District, or for which District may become liable, to the extent caused by negligent delays of Consultant in its performance hereunder, shall be paid to District by Consultant as provided for herein and/or under California law.
- 13.3. District shall not be responsible for any damage to persons or property as a result of the use, misuse or failure of any equipment used by Consultant, or by its employees, even though such equipment be furnished or loaned to Consultant by District.

13.4. The Consultant hereby waives any and all claim(s) for recovery from the District under this Agreement, which loss or damage is covered by valid and collectible insurance policies. Consultant agrees to have its required insurance policies endorsed to prevent the invalidation of insurance coverage by reason of this waiver. This waiver shall extend to claims paid, or expenses incurred, by Consultant's insurance company on behalf of the District.

Article 14. INSURANCE

- 14.1. Consultant shall procure prior to commencement of the Services of this Agreement and maintain for the duration of the Agreement insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Services hereunder by the Consultant, their agents, representatives, employees and subconsultant(s).
- 14.2. **Minimum Scope and limits of Insurance**: Coverage shall be at least as broad as the following scopes and limits:
 - 14.2.1. **Commercial General Liability.** Two million dollars (\$2,000,000) per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this project/location or the general aggregate limit shall be <u>twice</u> the required occurrence limit.
 - 14.2.2. **Commercial Automobile Liability, Any Auto**. Two million dollars (\$2,000,000) per accident for bodily injury and property damage.
 - 14.2.3. Workers' Compensation. Statutory limits required by the State of California and
 - 14.2.4. **Employer's Liability**. Two million dollars (\$2,000,000) per accident for bodily injury or disease.
 - 14.2.5. **Professional Liability**. This insurance shall cover the Consultant for two million dollars (\$2,000,000) aggregate limit subject to no more than seventy-five thousand dollars (\$75,000) per claim deductible, coverage to continue through completion of construction plus two years thereafter. The policy must contain terms or endorsements extending coverage that requires the insurer to defend and indemnify for acts which happen before the effective date of the policy provided the claim is first made during the policy period.
- 14.3. The District reserves the right to modify the limits and coverages described herein, with appropriate credits or changes to be negotiated for such changes.
- 14.4. **Deductibles and Self-Insured Retention**: Any deductibles or self-insured retention exceeding \$75,000 must be declared to and approved by the District. At the option of the District, either: the insurer shall reduce or eliminate such deductibles or self-insured retention as respects the District, its officers, officials, employees and volunteers; or the Consultant shall procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses.

- 14.5. **Other Insurance Provisions**: The general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:
 - 14.5.1. All policies except for the professional insurance policy shall be written on an occurrence form
 - 14.5.2. The District, the Consultant, their representatives, consultants, trustees, officers, officials, employees, agents, and volunteers ("Additional Insureds") are to be covered as additional insureds as respects liability arising out of activities performed by or on behalf of the Consultant; instruments of service and completed operations of the Consultant; premises owned, occupied or used by the Consultant; or automobiles owned, leased, hired or borrowed by the Consultant. The coverage shall contain no special limitations on the scope of protection afforded to the Additional Insureds.
 - 14.5.3. For any claims related to this project, the Consultant's insurance coverage shall be primary insurance as respects the Additional Insureds. Any insurance or self-insurance maintained by the Additional Insureds shall be in excess of the Consultant's insurance and shall not contribute with it.
 - 14.5.4. Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to the Additional Insureds.
 - 14.5.5. The Consultant's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.
 - 14.5.6. Each insurance policy required by this clause shall be endorsed to state that coverage shall not be suspended, voided, canceled by either party, reduced in coverage or in limits except after thirty (30) days prior written notice by certified mail, return receipt requested, has been given to the District.
- 14.6. **Acceptability of Insurers**: Insurance is to be placed with insurers admitted in California with a current A.M. Best's rating of no less than A:VII.
- 14.7. **Verification of Coverage**: Consultant shall furnish the District with:
 - 14.7.1. Certificates of insurance showing maintenance of the required insurance coverage;
 - 14.7.2. Original endorsements affecting general liability and automobile liability coverage. The endorsements are to be signed by a person authorized by that insurer to bind coverage on its behalf. All endorsements are to be received and approved by the District before work commences.

Article 15. NONDISCRIMINATION

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

Article 16. COVENANT AGAINST CONTINGENT FEES

Consultant warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the Consultant, to solicit or secure this Agreement, and

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

Article 17. ENTIRE AGREEMENT/MODIFICATION

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

Article 18. NON-ASSIGNMENT OF AGREEMENT

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

Article 19. LAW, VENUE

- 19.1. This Agreement has been executed and delivered in the State of California and the validity, enforceability and interpretation of any of the clauses of this Agreement shall be determined and governed by the laws of the State of California.
- 19.2. The county in which the District administration office is located shall be the venue for any action or proceeding that may be brought or arise out of, in connection with or by reason of this Agreement.

Article 20. ALTERNATIVE DISPUTE RESOLUTION

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

Article 21. SEVERABILITY

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

Article 22. EMPLOYMENT STATUS

22.1. Consultant shall, during the entire term of Agreement, be construed to be an independent contractor and nothing in this Agreement is intended nor shall be construed to create an

employer-employee relationship, a joint venture relationship, or to allow District to exercise discretion or control over the professional manner in which the Consultant performs the services which are the subject matter of this Agreement; provided always, however, that the services to be provided by Consultant shall be provided in a manner consistent with all applicable standards and regulations governing such services.

- 22.2. Consultant understands and agrees that the Consultant's personnel are not and will not be eligible for membership in or any benefits from any District group plan for hospital, surgical or medical insurance or for membership in any District retirement program or for paid vacation, paid sick leave or other leave, with or without pay or for other benefits which accrue to a District employee.
- 22.3. Should District, in its discretion, or a relevant taxing authority such as the Internal Revenue Service or the State Employment Development Department, or both, determine that Consultant is an employee for purposes of collection of any employment taxes, the amounts payable under this Agreement shall be reduced by amounts equal to both the employee and employer portions of the tax due (and offsetting any credits for amounts already paid by Consultant which can be applied against this liability). District shall then forward those amounts to the relevant taxing authority.
- 22.4. Should a relevant taxing authority determine a liability for past services performed by Consultant for District, upon notification of such fact by District, Consultant shall promptly remit such amount due or arrange with District to have the amount due withheld from future payments to Consultant under this Agreement (and offsetting any amounts already paid by Consultant which can be applied as a credit against such liability).
- 22.5. A determination of employment status pursuant to the preceding two paragraphs shall be solely for the purposes of the particular tax in question, and for all other purposes of this Agreement, Consultant shall not be considered an employee of District. Notwithstanding the foregoing, should any court, arbitrator, or administrative authority determine that Consultant is an employee for any other purpose, then Consultant agrees to a reduction in District's liability resulting from this Agreement pursuant to principles similar to those stated in the foregoing paragraphs so that the total expenses of District under this Agreement shall not be greater than they would have been had the court, arbitrator, or administrative authority determined that Consultant was not an employee.
- 22.6. Nothing in this Agreement shall operate to confer rights or benefits on persons or entities not a party to this Agreement.

Article 23. WARRANTY OF CONSULTANT

- 23.1. Consultant warrants that the Consultant is properly licensed and/or certified under the laws and regulations of the State of California to provide all the services that it has herein agreed to perform.
- 23.2. Consultant certifies that it is aware of the provisions of the Labor Code of the State of California, that require every employer to be insured against liability for workers compensation or to undertake self-insurance in accordance with the provisions of that code, and it certifies that it will comply with those provisions before commencing the performance of the Services of this Agreement.
- 23.3. Consultant certifies that it is aware of the provisions of California Labor Code that require the payment of prevailing wage rates and the performance of other requirements on certain "public

works" and "maintenance" projects ("Prevailing Wage Laws"). Since the Consultant is performing work as part of an applicable "public works" or "maintenance" project, and since the total compensation is One Thousand Dollars (\$1,000) or more, the Consultant agrees to fully comply with and to require its subconsultant(s) to fully comply with all applicable prevailing wage requirements of the California Labor Code.

Article 24. COST DISCLOSURE - DOCUMENTS AND WRITTEN REPORTS

Consultant shall be responsible for compliance with California Government Code section 7550, if the total cost of the Agreement is over Five Thousand Dollars (\$5,000).

Article 25. COMMUNICATIONS / NOTICE

Communications between the Parties to this Agreement may be sent to the following addresses:

District	<u>Consultant</u>
Alameda Unified School District	Quattrocchi Kwok Architects, Inc.
2060 Challenger Dr.	636 Fifth Street
Alameda, CA 94501	Santa Rosa, CA 95404
Attn: Director MOF	ATTN: Mark Quattrocchi

The Parties, by notice given hereunder, may designate different addresses to which subsequent notices, certificates or other communications will be sent.

Article 26. DISABLED VETERAN BUSINESS ENTERPRISE PARTICIPATION

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

Article 27. OTHER PROVISIONS

- 27.1. Neither the District's review, approval of, nor payment for, any of the services required under this Agreement shall be construed to operate as a waiver of any rights under this Agreement, and Consultant shall remain liable to the District in accordance with this Agreement for all damages to the District caused by Consultant's failure to perform any of the services furnished under this Agreement to the standard of care of the Consultant for its Services, which shall be, at a minimum, the standard of care of construction program planning consultant performing similar work for California school districts at or around the same time and in or around the same geographic area of the District.
- 27.2. Each party warrants that it has had the opportunity to consult counsel and understands the terms of this Agreement and the consequences of executing it. In addition, each party acknowledges that the drafting of this Agreement was the product of negotiation, that no party is the author of this Agreement, and that this Agreement shall not be construed against any party as the drafter of the Agreement.

IN WITNESS WHEREOF, the Parties hereto have executed this Agreement on the date(s) indicated below.

Print Title:

President

Print Title:

EXHIBIT "A"

RESPONSIBILITIES AND SERVICES OF MASTER PLANNING CONSULTANT

Consultant shall provide all professional services necessary for completing the following: See **also Exhibit "E"** for further description of professional services.

1. BASIC SERVICES

Consultant agrees to provide the Services described below.

- 1.1. Be responsible for the professional quality and technical accuracy of all studies, reports, projections, master plans, specifications and other services furnished by Consultant under the Agreement as well as coordination with all master plans, studies, reports, designs, drawings and other information provided by District. Consultant shall, without additional compensation, correct or revise any errors or omissions in its studies, reports, projections, master plans, specifications and other services.
- 1.2. Coordinate Services with the District, the District's other consultants and between subconsultants.
- 1.3. Prepare written communication for distribution by District.
- 1.4. Coordinate the development of a master plan website.
- 1.5. Mandatory Assistance. If a third party dispute or litigation, or both, arises out of, or relates in any way to the Services provided under this Agreement, upon the District's request, the Consultant, its agents, officers, and employees agree to assist in resolving the dispute or litigation. The Consultant's assistance includes, but is not limited to, providing professional consultations, attending mediations, arbitrations, depositions, trials or any event related to the dispute resolution and/or litigation ("Mandatory Assistance"). The District will compensate the Consultant for fees incurred for providing Mandatory Assistance as Extra Services. If, however, the fees incurred for the Mandatory Assistance are determined, through resolution of the third party dispute or litigation, or both, to be attributable in whole, or in part, to the acts or omissions of the Consultant, its agents, officers, and employees, the Consultant shall reimburse the District. The District is then entitled to reimbursement of all fees paid to the Consultant, its agents, officers, and employees for Mandatory Assistance.

2. INVESTIGATION

Consultant shall perform the following investigatory Services:

- 2.1. **District and Site Information.** Thoroughly review and analyze all information and documentation provided by the District which shall include, if available:
 - 2.1.1. Physical characteristics of District sites to be considered in planning;
 - 2.1.2. Previous reports, studies, master planning documents and program documents;
 - 2.1.3. Educational master plan(s).
- 2.2. Additional Information. If Consultant determines that the information or documentation the

District provides is insufficient for purposes of planning or if the Consultant requires other information that the District has not provided, the Consultant shall request that the District acquire that information at the soonest possible time after Consultant becomes aware that this additional information is needed. If the Parties mutually agree, this additional information and service shall be procured through the Consultant, who may invoice the District for those services as Extra Services.

2.3. Meetings and Site Visits

- 2.3.1. **Initial Site Visit(s).** Take initial site visit with District staff of all District sites to be considered in planning. Consultant shall take an initial visual inventory and document the existing conditions.
- 2.3.2. **Team Meetings.** Organize, conduct, and take minutes of meetings with District's current architects, construction managers, and staff to discuss goals, process, parameters, phasing of planning process, and coordinating discussions at all District sites to be considered in planning. Currently estimated to be three to five meetings of two to three hours each.
- 2.3.3. **Site Meetings/Public Input.** Organize, conduct, and take minutes of meetings with site personnel and District staff at each District site to be considered in planning. Currently estimated to be two meetings of two to three hours each at each District site to be considered in planning. These meetings will be to discuss site personnel's goals, experiences at the site, and other information.
 - 2.3.3.1. At least one of these site meetings will be a public community informational meeting to receive input from the community regarding its wishes and expectations regarding the program and the site.
- 2.3.4. **Responses to Inquiries.** Consultant shall always be prepared to answer questions and issues from District staff, architects, construction managers, and site staff, as applicable.
- 2.3.5. **Meeting Logs and Minutes.** Consultant shall maintain a log and take detailed minutes of all meetings, site visits or site observations held in conjunction with the program development, with documentation of major discussion points, observations, decisions, questions or comments. These shall be furnished to the District and/or its representative.
- 2.3.6. **Documentation.** As required, Consultant shall provide at no additional cost to the District copies of all documents or other information needed for each meeting, site visit, or workshop.
- 2.3.7. **Attendance.** The Consultant and its appropriate subconsultant(s) shall attend these meetings.
- 2.3.8. Scope of Meetings. During each of these meetings, the Consultant shall:
 - 2.3.8.1. Identify and review pertinent information and/or documentation necessary from the District for the completion of the planning for the component of the program related to that specific site and project(s).

2.3.8.2. At the meetings at each site, review and explain the overall program goals, general approach, tasks, work plan and procedures and deliverable products of the program related to that specific site and project(s).

3. PROGRAM DEVELOPMENT

- 3.1. **Development of Program.** The Consultant shall prepare for the District's review a program as follows:
 - 3.1.1. **Regulatory Constraints.** Identify functional needs, directives and constraints imposed by applicable regulatory codes.
 - 3.1.2. Existing Facilities. Analyze existing sites and facilities (I.e. vehicular, circulation, zoning)
 - 3.1.3. **Current Site Plan.** Develop analysis graphics for review and discussion. This should include an existing conditions footprint map or drawing for each site that can be used as a basis for a schematic design.
 - 3.1.4. **Program Enrollment Trends.** Collect and analyze enrollment and program trends for the past five (5) years and analyze the popularity of specific programs and identify highest growth programs.
 - 3.1.5. **Program Enrollment Forecasts.** Develop District-wide enrollment and program forecasts, including growth and/or decline for each program and location(s) of each program.
 - 3.1.6. **Project List and Facility Priorities.** Prepare a project list for each site, identifying all facilities planning priorities and recommended prioritization. This should include prioritization of projects, re-purposing current facilities and relocation (if needed) for programs. At a minimum, this facilities master plan shall include:
 - 3.1.6.1. Master plan project list.
 - 3.1.6.2. Preliminary planning options in all components of program and identify and explain any "preferred" options.
 - 3.1.6.3. A space program for facilities planning that reflects current trends and to house anticipated program.
 - 3.1.6.4. Sequencing of projects and scopes of work.
 - 3.1.6.5. Swing-space needs at each site.
 - 3.1.6.6. Direct linkage between the identified projects and the budgets (see below), or preparation and presentation of these items together.
 - 3.1.7. **State-Funding Information.** Develop strategies to maximize state and federal funding possibilities, including identification of specific programs and potential amounts.
 - 3.1.8. Budgets

- 3.1.8.1. Construction Budget: The total amount indicated by the District for a project plus all other costs, including design, construction, administration, financing, and all other costs.
- 3.1.8.2. Construction Cost Budget: The total cost to District of all elements of a project designed or specified by the Design Team, as adjusted at the end of each design phase in accordance with this Agreement. The Construction Cost Budget does not include the compensation of Construction or Program Manager(s), the Design Team, the Consultant, the cost of the land, rights-of-way, financing or other costs which are the responsibility of the District.
- 3.1.8.3. Consultant shall develop and provide a Construction Budget and a Construction Cost Budget within the parameters provided by the District. Consultant shall prepare these budgets with the following parameters and requirements:
 - 3.1.8.3.1. All costs are to be based on current prices, with escalation rate and duration clearly identified as a separate line item.
 - 3.1.8.3.2. Format of the Construction Cost Budget shall be in a building systems format (e.g., foundations, substructure, structural system, exterior wall enclosure, window systems, etc.) for new buildings, and summarized by the Construction Specification Institute (CSI) category for buildings being modernized.
 - 3.1.8.3.3. Contingencies for design, bidding, and construction are to be included as individual line items, with the percentage and base of calculation clearly identified.

4. PROGRAM PRESENTATION AND DELIVERABLES

- 4.1. **Initial Draft.** Consultant shall provide to the District two (2) hard copies and one (1) copy in electronic format of a draft of all of the documents required above, including the following:
 - 4.1.1. A draft master plan (Include narrative explaining each portion);
 - 4.1.2. A draft Construction Budget;
 - 4.1.3. A draft Construction Cost Budget;
 - 4.1.4. **Presentation.** Consultant along with any involved subconsultant(s) shall present and review with District staff and, if directed, with the District's governing board, the draft planning documents.
- 4.2. **Final Draft.** Based on all information and recommendations received in response to the initial draft, Consultant shall provide to the District two (2) hard copies and one (1) copy in electronic format of a final version of all of the documents required above, including the following:
 - 4.2.1. A final master plan (Include narrative explaining each portion);
 - 4.2.2. A final Construction Budget;

- 4.2.3. A final Construction Cost Budget;
- 4.2.4. **Presentation.** Consultant along with any involved subconsultant(s) shall present and review with District staff and with the District's governing board, the final planning documents.
- 4.3. **Revised Final Draft.** Based on all information and recommendations received in response to the final draft, Consultant shall provide to the District two (2) hard copies and one (1) copy in electronic format of a revised final version of all of the documents required above, including the following:
 - 4.3.1. A revised final master plan (Include narrative explaining each portion);
 - 4.3.2. A revised final Construction Budget;
 - 4.3.3. A revised final Construction Cost Budget;
 - 4.3.4. **Presentation.** Consultant along with any involved subconsultant(s) shall present and review with District staff and with the District's governing board, the revised final planning documents.
- 4.4. **Governing Board Meetings.** Consultant acknowledges that the District's governing board must approve all final planning and program documents. Consultant shall, at the District's direction, attend District governing board meeting(s) and present the Consultant's planning and program documents to the District's governing board for review, consideration and approval.

EXHIBIT "B"

PAYMENT PROVISIONS AND CRITERIA AND BILLING FOR EXTRA SERVICES

Compensation

- 1. The Consultant's fee set forth in this Agreement shall be full compensation for all of Consultant's Services incurred in its performance, including, without limitation, all costs for personnel, travel within two hundred (200) miles of the District Office, offices, per diem expenses, printing, providing, or shipping of deliverables in the quantities set forth in **Exhibit "A."**
- 2. The Fee shall not exceed the amount set forth in the Agreement, including all billed expenses, without advance written approval of the District. The Fee shall be paid as indicated below ("Fee Schedule").

Educational Specifications:	\$17,280
Facilities Assessment	\$58,000
Individual Campus Master Planning	\$117,490
Community Outreach	\$20,940
Bond Planning	\$11,880
Document/ Drawing Printing Allowance	\$20,000
Discount	<u>(\$7,090</u>)
Total:	\$238,500

Method of Payment

- Consultant shall submit monthly invoices on a form and in the format approved by the District.
 Consultant shall submit these invoices in duplicate to the District via the District's authorized representative.
- 2. Consultant shall submit to District on a monthly basis documentation showing proof that payments were made to his/her sub-consultants.
- 3. Upon receipt and approval of Consultant's invoices, the District agrees to make payments on all undisputed amounts within sixty (60) days of receipt of the invoice.

Payment for Extra Services

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

- 1. Providing deliverables or other items in excess of the number indicated in **Exhibit "A."** Before preparing, providing, sending, or invoicing for extra deliverables, Consultant shall inform the District that expected deliverables may be in excess of the number indicated in **Exhibit "A,"** so that District can procure the additional deliverables itself or direct Consultant to procure the deliverables at District's expense or on District's account at a specific vendor.
- 2. Providing services as directed by the District that are not part of the Services of this Agreement.

- 3. Providing services as an expert and/or witness for the District in any mediation, arbitration, and/or trial in which the Consultant is (1) not a party, and (2) did not in any way cause the dispute that is being adjudicated.
- 4. The following rates, which include overhead, administrative cost and profit, shall be utilized in arriving at the fee for Extra Services and shall not be changed for the term of the Agreement.

Job Title	Hourly Rate	
Principal In Charge	\$195	
Senior Associate	\$180	
Project Architect	\$175	
Job Captain	\$165	
Drafting	\$155	
Administrative	\$100	

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

EXHIBIT "C"

SCHEDULE OF SERVICES OF MASTER PLANNING CONSULTANT

- 1. Consultant shall complete all work and services required per the Schedule of Services after written authorization from the District to proceed.
- 2. The durations stated in the Schedule of Services shall include the review periods required by the District.
- 3. All times to complete tasks set forth in this Exhibit are of the essence, as per the Agreement. If delays in the Schedule of Services are imposed by the District's inability to comply with requested meeting schedules, Consultant shall maintain the right to request an adjustment in the Schedule of Services if deemed necessary to meet the deadlines set forth in this Exhibit. If approved, such extensions shall be authorized in writing by the District.

EXHIBIT "D"- CERTIFICATIONS

FINGERPRINTING/CRIMINAL BACKGROUND INVESTIGATION CERTIFICATION

One of the three boxes below <u>must</u> be checked, with the corresponding certification provided, and this form attached to the Independent Consultant Agreement for Professional Services ("Agreement"):

pupils the investigathis Agree	contact, if any, with District pupils and nat may come in contact with Consult ation requirements of Education Code eement. As an authorized District offithis certificate on behalf of the District	
	Date:	Title:
	Signature:	
□ apply to		ground investigation requirements of Education Code section 45125.1 ement and Consultant certifies its compliance with these provisions
as follow investige	vs: "Consultant certifies that the Con ation requirements of Education Code	sultant has complied with the fingerprinting and criminal background esection 45125.1 with respect to all Consultant's employees,
Employe Consulte	ees are paid or unpaid, concurrently e ant, who may have contact with Distr	employees or agents ("Employees") regardless of whether those mployed by the District, or acting as independent contractors of the ict pupils in the course of providing services pursuant to the
convicte Employe	ed of a felony, as that term is defined ees who may come in contact with Dis	f Justice has determined that none of those Employees has been in Education Code section 45122. 1. A complete and accurate list of al strict pupils during the course and scope of the Agreement is attached
hereto."		
contact,	tation, or repair of a school facility an with District pupils, pursuant to Edu y at least one of the following as mar	
	Continual supervision and remployee of Consultant,	al barrier at the worksite to limit contact with pupils. monitoring of all Consultant's on-site employees of Consultant by an, whom the Department of Justice has onvicted of a violent or serious felony.
	Surveillance of Employees b	by District personnel. [TO BE COMPLETED BY DISTRICT]
	District Representative's Na	ame and Title:
the Dist	COMPLETED BY CONSULTANT] I am a	a representative of the Consultant entering into this Agreement with erein certified, and am authorized and qualified to execute this
	Date:	
	Signature:	
	Print Name and Title:	· · · · · · · · · · · · · · · · · · ·

ROOFING CONTRACT FINANCIAL INTEREST CERTIFICATION (Public Contract Code section 3006)

	between Alameda Unified School District ("District" or
,	("Consultant") ("Contract" or
"Project").	
Name	Name of Consultant
contribution, or any financial incent contracts on this program. As used	n, or agreed to give, received, accepted, or agreed to accept, any gift, tive whatsoever to or from any person in connection with the roof project in this certification, "person" means any natural person, business, partnership,
corporation, union, committee, club	o, or other organization, entity, or group of individuals.
Furthermore, I	Name of Consultant
Name	Name of Consultant
connection with the performance of manufacturer, distributor, or vendors. Name Have the following financial relation distributor, or vendor, or other personal distributor, or vendor distributor, or vendor, or other personal distributor, or vendor distributor, or vendor, or other personal distributor.	Name of Consultant nships with an architect, engineer, roofing consultant, materials manufacturer, son in connection with the following roof project contract:
I certify that to the best of my know	vledge, the contents of this disclosure are true, or are believed to be true.
Date:	
Proper Name of Consultant:	
Troper Maine of Consultant.	
Signature:	
Print Name:	
Title:	
•	



EXHIBIT E

October 14, 2013

Robbie Lyng
Director of Maintenance, Operations and Facilities
Alameda Unified School District
2060 Challenger Drive
Alameda, CA 94501

RE: Alameda Unified School District Master Planning

Dear Robbie;

I am pleased to provide this proposal for Master Planning services for 17-school sites (19-individual schools) and two other District facilities for the Alameda Unified School District (AUSD). We are excited to be working with you and your team on this important project.

School Board Direction & Input

This proposal is a result of Master Plan conversations with the Board of Trustees on September 25th and again on October 8th. I suggest we commence the Master Planning process in a Board meeting or special study session to receive Board input and hear their thoughts on values important to them for the Master Plan – such as school safety, educational program, neighborhood needs, etc. Understanding and sharing the Board's values with the subsequent school and community groups will be invaluable to the Master Plan process. As the proposal indicates, we would then meet two additional times with the Board during the process to review progress and receive direction.

It is our hope that with active District and Board involvement, the process can be well managed – ensuring adequate school and community input, while focusing input to the number of meetings identified in this proposal.

Demographics & Current Facility Capacity:

The District possesses a Demographic Study and School Capacity Analysis completed in 2010 by Jack Schreder & Associates. As recently completed reports, it is anticipated these studies can be used to develop your master plan including enrollment projections that establish needs for new classrooms at each school. It is anticipated the District will review these projections with Schreder & Associates and determine if any review and updating is warranted prior to QKA using this information for master planning.

SCOPE OF WORK:

Below is our proposed scope of work and fee for the project:

EDUCATION SPECIFICATIONS: QKA will work with AUSD staff to develop a District-wide Education Specification. The purpose of the Education Specification is to identify the District's educational vision and program for each type of school and to describe the physical facilities that support that Educational Program. This work is divided into District created Education Program and architect facilitated Building Program.

Education Program: Prior to working with QKA, it is anticipated the District will create an Education Specification Committee to independently develop new or refine existing Education Program guidelines and goals that effect facility needs for:

- High Schools
- Middle Schools
- Elementary Schools

Building Program: Upon completion of the District's Education Program work, QKA will facilitate 4-meetings with the Education Program committee to develop the Building Program portion of the Education Specification. The Building Program will detail facility needs and standards including standard space sizes, features, adjacencies, etc. that support the District's Educational Program. This document will be divided into the three grade level areas above. QKA will prepare and publish the final document for review by the committee and approval by the Board of Education.

FACILITIES ASSESSMENTS: QKA completed the Facility Assessment for the District's 17-campuses and is presented in the June 4, 2012 Alameda USD Facilities Assessment Report. This work is invaluable in understanding needs and costs associated with each campus master plan.

Historic Alameda High School Structural & Facility Assessment: Absent from the 2012 AUSD Facilities Assessment report was the Historic Alameda High School including the student occupied West Wing and Kofman Auditorium. While a preliminary estimate was provided for these historic buildings, it was based on costs for the Napa Historical High School campus and not through analysis and detailed engineering review of these Alameda High School Historic structures.

QKA and our Structural Engineering consultant will review existing structural systems to identify needed improvements to the historic structures regardless of Field Act (DSA) approval status. It is anticipated the District will provide geotechnical engineering services to facilitate the analysis. Based on the District's new Geotechnical report, QKA will coordinate an analysis of the existing structural systems as it relates to future development potential. Additionally, QKA and our engineering team will evaluate the Historic Alameda High School for civil, structural, mechanical/plumbing, and architectural improvements. This assessment includes site and building accessibility, paving, windows, doors, roofing, weatherproofing, exterior finishes, interior finishes, electrical/lighting systems, technology, and mechanical and plumbing systems to determine the expected lifespan of each system and identify what improvements are needed.

The improvements required for the Historic Alameda High School will be cost estimated and identified in the Master Plan. The assessment deliverable will be a written report describing the needed improvements.

Maintenance/Supply Yard and "The Warehouse": Also not included in the June 2012 District Facilities Assessment Report are these two support facilities. Our scope of work will include architectural, as well as, mechanical and electrical engineering assessments to determine the condition of these facilities including recommendations for repair or replacement. Like our previous facilities assessments, the recommendations will be provided in a narrative and accompanied by a cost estimate for recommended work or replacement.

Potential Additional Services: Facility Assessment of other District facilities as requested.

INDIVIDUAL CAMPUS MASTER PLANNING: QKA will work with a Master Planning Committee at each of your 17-school campuses to collaboratively review facility needs and create a comprehensive Master Plan for each school. The 17-separate campus committees will be composed of members as directed by the District. QKA recommends users for each campus, such as, school administrators, staff, teachers, maintenance staff, students, parents and neighbors. QKA will facilitate these Committee meetings for input such as:

- Alterations to spaces for Ed Specs
- Safety/Security including fence locations
- Locate additions & new construction
- Drop-off improvements

- Evaluate & alter existing spaces
- Identifying outdoor learning areas
- Field & playground improvements
- · Other campus improvements

Our work will include site plan development drawings identifying desired improvements, prioritization of needs, cost estimating of improvements, agendas, and meeting notes that will be incorporated into the final District Master Plan.

The Campus Master Plan Committee meetings will be held at each campus. For campuses with multiple users, such as a school on a site with a Charter School, a single Committee is formed that represents all users that share a property. As relatively smaller meetings, and unlike the larger Community Outreach meetings, it is <u>not</u> anticipated the Individual School Master Plan Committee meetings will require other input methodologies such as use of "audience response clickers", etc. These services can be provided if requested by the District as an additional service.

The Campus Master Plans for each campus will address the physical and programmatic needs identified in the 2012 Facilities Assessment Report, as well as, any additional facilities improvements identified by the Committee.

Upon completion of each campus' Committee work, QKA will create and publish a Master Plan document for each site which includes colored site plan graphic, written narrative descriptions of the proposed improvements, estimates and priorities. The chart below identifies the number of meetings provided in this proposal for each campus. As stated above, it is our hope that with active District and Board involvement, the process can be well managed – ensuring adequate input, while focusing input to the number of meetings identified in this proposal.

Campus	No. Committee Mt	gs.	Campus	No. Committee M	<u>Itgs.</u>
Nea/Academy of Alamed	la (formerly Chipman)	2	Lincoln Middle Schoo	1	3
Alameda High School		5	Nea/WCDC (formerly	y Longfellow)	2
Bay Farm Elementary S	School	2	Donald Lum Element	ary School	2
Amelia Earhart Elemer	ntary School	2	Frank Otis Elementary	y School	2
Edison Elementary Sch	ool	2	William Paden Eleme	ntary School	2
Encinal High School		5	Ruby Bridges Elemen	tary School	2
Franklin Elementary Sc	rhool	2	Washington Elementa	ary School	2
Haight Elementary Sch	ool	2	Will C. Wood Middle	School/ACLC	3
	•		Woodstock Education	ı Center	2

COMMUNITY & BOARD OUTREACH: QKA will work with the AUSD to engage the Alameda community in the Master Planning Process. Upon completion of the Individual Campus Master Plan meetings conducted at each site, QKA will facilitate three Community Forums. These meetings will be an opportunity for the team to meet with the community as a whole to hear their concerns, present our work, gather community feedback, and build community support. QKA will facilitate these meetings or coordinate our work with a District facilitator.

To increase public input during the three-Community Forums, QKA will provide audience response clickers to allow community response to a variety of predetermined questions. This technology totals the response for quick feedback and encourages input by those otherwise not inclined to speak.

Additionally, QKA will work with District staff to produce and coordinate up to five short community newsletters that can be sent electronically and/or by US mail to encourage community input, inform the community of progress, and announce upcoming meetings.

Board Presentations: In addition to these meetings QKA will make <u>three</u> presentations to the Board of Education in regular or special board meeting sessions to seek board input, approvals and provide additional venues for community comment. This includes an initial Board meeting to discuss processes and seek their thoughts on values important to them for the Master Plan.

PRIORITIZATION & FINAL DOCUMENT PREPARATION: Upon completion of the Individual School Master Planning, updated Facilities Assessments and Community Forums - along with District provided geotechnical reports, revised demographics, facility capacity and state funding - QKA will work with the District to finalize facility improvement priorities in two District meetings. Input received from school staff and Community Forums will guide the prioritization process. Final facility improvement prioritization will be approved by the Board of Trustees.

Upon completion of prioritization, a District Master Plan document will be created. The document will be organized with a description of the process, executive summary outlining final priorities and costs, summary of demographic and facility capacity updates, and tabs for each campus including master plan drawings, estimates and narratives.

BOND PLANNING & SUPPORT: QKA will assist AUSD and your other consultants on the District's Bond Team in planning for a potential bond measure. QKA will work with AUSD staff in support of bond planning including providing facility improvement needs and cost estimates, assist in developing survey questions to poll the community, provide desired graphics, such as, campus master plans and other bond assistance services.

Robbie Lyng Alameda USD Master Planning Proposal Page 7 of 7

PROPOSED FEES: For these services we propose a fixed fee to be billed on a percentage of completion basis. Reimbursable expenses beyond printing allowance below will be billed in addition to this amount at cost plus 10%.

The proposed fees for each phase are as follows:

 Educational Specifications: 	\$17,280
• Facilities Assessment	\$58,000
• Individual Campus Master Planning:	\$117,490
Community Outreach:	\$20,940
Bond Planning:	\$11,880
Document/ Drawing Printing Allowance	\$20,000
• Discount (\$ <u>7,090</u>)	
• Total:	\$238,500

Thank you for the opportunity to provide this proposal. Please let me know if you have any questions. If this proposal is acceptable, please sign where indicated below and return one copy.

Sincerely

Mark Quattrocchi, AIA

Sign below to accept this proposal and fees:

Alameda Unified School District

Date