DESIGN SERVICES CONTRACT

CITY OF PORTLAND

CONTRACT NUMBER

MT. SCOTT COMMUNITY CENTER SEISMIC RETROFIT AND EXPANSION PROJECT

As authorized by Ordinance (*number TBD*) and Portland City Code 5.68.035, this Design Services Contract ("Contract") is entered into by and between the City of Portland ("City," or "Bureau") and FFA Architecture and Interiors, Inc., ("Consultant").

Effective Date and Term

This Contract shall commence on (*date TBD*) and shall continue in full force and effect until (*date TBD*) or such other date on the Contract is terminated or extended pursuant to the terms of this Contract ("Term").

Consideration

- (a) City agrees to pay Consultant a sum not to exceed _Three Million Five Hundred Sixty-Six Thousand Three Hundred Twenty Eight Dollars and Fifty Cents (\$3,566,328.50) to complete the work in accordance with the Statement of Work (SOW), attached hereto as Exhibit A.
- (b) Payments shall be made in accordance with the Compensation section, attached hereto as Exhibit B.

CONSULTANT DATA AND CERTIFICATION

Name (print full legal name): <u>FFA Architecture and Interiors, Inc.</u> Address: <u>520 SW Yamhill Street, Suite 900, Portland, OR 97204</u>

Business Designation (check one):	Individual	Sole Proprietorship	Partnership	Corporation
Limited Liability Co (LLC)		Public Service Corp.	Government/N	Nonprofit

Payment information will be reported to the IRS under the name provided above. Information must be provided prior to contract approval.

TERMS AND CONDITIONS

1) Standard of Care

In providing services under this Contract, the Consultant shall exercise that degree of skill and care ordinarily used by other reputable members of Consultant's profession, practicing in the same or similar locality and under similar circumstances (the "Standard of Care").

2) Effect of Expiration

Expiration of the Term shall not extinguish, prejudice, or limit either party's right to enforce this Contract with respect to any default or uncorrected defect in performance.

3) Order of Precedence

This Contract consists of these Terms and Conditions, the SOW, all Exhibits, and the City's RFP and Consultant's Proposal. Any apparent or alleged conflict between these items will be resolved by using the following order of precedence:

- (a) Contract Amendments executed by the parties after Contract award;
- (b) This form of Contract as executed by the Parties, including all Exhibits, but excluding City's RFP and Consultant's Proposal;
- (c) RFP Requirements as set forth in City's RFP, including without limitations all Exhibits and any Addenda; and
- (d) Consultant's Proposal in response to the RFP, including without limitation, to all supplementary materials.

4) Early Termination of Contract

(a) The City may terminate this Contract for convenience at any time for any reason deemed appropriate in its sole discretion. Termination shall be effective immediately upon City's delivery of a written notice of termination to Consultant.

- (b) Either party may terminate this Contract in the event of a material breach by the other party that is not timely cured. Before termination is permitted, the party seeking termination shall give the other party written notice of the nature of the alleged breach, its intent to terminate, and provide fifteen (15) calendar days within which to cure the breach. If the breach is not cured within 15 days, the party seeking termination may terminate immediately by giving written notice that the Contract is terminated.
- 5) Remedies and Payment on Early Termination
 - (a) If the City terminates pursuant to 4(a) above, the City shall pay the Consultant for work performed in accordance with the Contract prior to the date of the termination notice. No other costs or loss of anticipated profits shall be due or payable.
 - (b) If the City terminates pursuant to 4(b) above, the City is entitled all remedies available at law or equity. In addition, Consultant shall pay the City for the costs to defend any claim, and all damages, costs, and sums incurred by the City as a result of the breach.
 - (c) If the Consultant terminates the Contract pursuant to subsection 4(b), the Consultant's sole remedy shall be payment for work completed prior to date of City's receipt of the termination notice. No other costs, loss of anticipated profits or consequential damages shall be paid.
 - (d) If the City's termination under Section 4(b) was wrongful, the termination shall be automatically converted to one for convenience and the Consultant shall be paid as if the Contract was terminated under Section 4(a).
 - (e) In the event of early termination, the Consultant's work product completed prior to the date of termination shall be deemed the property of the City and copies and/or data shall be immediately released to the City.

6) Assignment

Consultant shall not subcontract, assign, or transfer any of the work scheduled under this agreement without the prior written consent of the City. Notwithstanding City consent, the Consultant shall remain responsible for full performance hereunder. The Consultant agrees that if subcontractor(s) are employed in the performance of the SOW under this Contract, both Consultant and any subcontractors remain subject to the requirements of ORS Chapter 656, Workers' Compensation.

7) Compliance with Applicable Laws; Funding Requirements

Consultant shall perform all services in accordance with all applicable federal, state, and local laws and regulations, including without limitations tax laws and terms and conditions incident to receipt of any grant funds. Consultant represents and warrants that it is and will remain in compliance with all laws and expressly represents that it is and shall remain in compliance with Title VI of the Civil Rights Act of 1964 and its corresponding regulations during the Term of this Contract.

8) Respectful Workplace Behavior

The City is committed to a respectful work environment, free of harassment, discrimination and retaliation and other inappropriate conduct. Every individual has a right to work in a professional atmosphere where all individuals are treated with respect and dignity. The City's HR Rule 2.02 covers all employees of the City as well as consultants, vendors or contractors who provide services to the City. Consultant warrants its compliance with the terms and conditions of HR 2.02 as further described at: https://www.portlandoregon.gov/citycode/27929.

9) Indemnification for Property Damage and Personal Injury

Consultant shall indemnify, defend, and hold harmless the City, its officers, agents, and employees, from all claims, losses, damages, and costs (including reasonable attorney fees) for personal injury and property damage arising out of the intentional or negligent acts or omissions of the Consultant, its Subconsultants, suppliers, employees or agents in the performance of its services. Nothing in this paragraph requires the Consultant or its insurer to indemnify the City for claims of personal injury or property damage caused by the sole negligence or misconduct of the City. This duty shall survive the expiration or termination of this Contract or final payment hereunder.

The indemnity obligations of Consultant under this Contract will not in any way be affected or limited by the absence of insurance coverage or by the failure or refusal of any insurance carrier to perform any obligation under insurance policies affecting this Contract.

Consultant's indemnity obligations are in addition to any other rights or remedies available under this Contract, or in law or in equity to the City. In the event of any claim or demand made against any party entitled to indemnification hereunder, the City may in its sole discretion reserve, retain or apply any monies due to the Consultant under the Contract to resolve such claims; provided, however, that the City may release such funds if the Consultant provides the City with adequate assurance of the protection of the City's interests. The City shall determine in its sole discretion of the adequacy of such assurances.

10) Insurance

Consultant shall obtain and maintain in full force at Consultant's sole cost and expense, throughout the Term and any warranty or extension periods, the required insurance identified below. The City reserves the right to require additional insurance coverage as required by statutory or legal changes to the maximum liability that may be imposed on Oregon cities during the term of the Contract.

(a) Workers' compensation insurance as required by ORS Chapter 656 and as it may be amended. Unless exempt under ORS Chapter 656, the Consultant and all Subconsultants shall maintain applicable coverage for all subject workers. Required and attached // ___Certified statement of exemption (i.e., completion of Independent Contractor Certification Statement or similar)

(b) General commercial liability (CGL) insurance covering bodily injury, personal injury, property damage, including coverage for independent Consultant's protection (required if any work will be subcontracted), premises/operations, contractual liability, products and completed operations, in per occurrence limit of not less than \$1,000,000, and aggregate limit of not less than \$2,000,000.

🖾 Required and attached // 🗌 Waived by Bureau Director or designee // 🗌 Reduce by Bureau Director or designee

(c) Automobile liability insurance with coverage of not less than \$1,000,000 each accident, and an umbrella or excess liability coverage of \$2,000,000. The insurance shall include coverage for any auto or all owned, scheduled, hired and non-owned auto. This coverage may be combined with the commercial general liability insurance policy.

🛛 Required and attached // 🗌 Waived by Bureau Director or designee // 🗌 Reduce by Bureau Director or designee

(d) Professional Liability and/or Errors & Omissions insurance to cover damages caused by negligent acts, errors or omissions related to the professional services, and performance of duties and responsibilities of the Consultant under this Contract in an amount with a combined single limit of not less than \$1,000,000 per occurrence and aggregate of \$3,000,000 for all claims per occurrence. In lieu of an occurrence-based policy, Consultant may have claims-made policy in an amount not less than \$1,000,000 per claim and \$3,000,000 annual aggregate, if the Consultant obtains an extended reporting period or tail coverage for not less than three (3) years following the termination or expiration of the Contract.

🛛 Required and attached // 🗌 Waived by Bureau Director or designee // 🗌 Reduce by Bureau Director or designee

Continuous Coverage; Notice of Cancellation: The Consultant agrees to maintain continuous, uninterrupted coverage for the duration of the Contract. There shall be no termination, cancellation, material change, potential exhaustion of aggregate limits or non-renewal of coverage without thirty (30) days written notice from Consultant to the City. If the insurance is canceled or terminated prior to completion of the Contract, Consultant shall immediately notify the City and provide a new policy with the same terms. Any failure to comply with this clause shall constitute a material breach of Contract and shall be grounds for immediate termination of this Contract.

Additional Insured: The liability insurance coverages, except Professional Liability, Errors and Omissions, or Workers' Compensation, shall be without prejudice to coverage otherwise existing, and shall name the City of Portland and its bureaus/divisions, officers, agents and employees as Additional Insureds, with respect to the Consultant's activities to be performed, or products or services to be provided. Coverage shall be primary and non-contributory with any other insurance and self-insurance. Notwithstanding the naming of additional insureds, the insurance shall protect each additional insured in the same manner as though a separate policy had been issued to each, but nothing herein shall operate to increase the insurer's liability as set forth elsewhere in the policy beyond the amount or amounts for which the insurer would have been liable if only one person or interest had been named as insured.

Certificate(s) of Insurance: Consultant shall provide proof of insurance through acceptable certificate(s) of insurance, including additional insured endorsement form(s) and all other relevant endorsements, to the City prior to the award of the Contract if required by the procurement documents (e.g., request for proposal), or at execution of Contract and prior to any commencement of work or delivery of goods or services under the Contract. The Certificate(s) will specify all of the parties who are endorsed on the policy as Additional Insureds (or Loss Payees). Insurance coverages required under this Contract shall be obtained from insurance companies acceptable to the City of Portland. The Consultant shall pay for all deductibles and premium. The City reserves the right to require, at any time, complete, certified copies of required insurance policies, including endorsements evidencing the coverage the required.

Subconsultant(s): Consultant shall contractually require its Subconsultants to acquire and maintain in effect until full performance of their Work under this Contract, insurance equal to the minimum coverage limits required above.

11) Ownership of Work Product

All work product produced by the Consultant under this Contract is the exclusive property of the City upon payment in full to Consultant as set forth in this Contract. "Work Product" includes, but is not limited to research, reports, computer programs, manuals, drawings, recordings, photographs, artwork and any data or information in any form. The Consultant and the City intend that such Work Product shall be deemed "work made for hire" of which the City shall be deemed the author. If for any reason a Work Product is deemed not to be a "work made for hire," the Consultant hereby irrevocably assigns and transfers to the City all right, title and interest in such work product, whether arising from copyright, patent, trademark, trade secret, or any other state or federal intellectual property law or doctrines. Consultant shall obtain such interests and execute all documents necessary to fully vest such rights in the City. Consultant waives all rights relating to work product, including any rights arising under 17 USC 106A, or any other rights of authorship, identification or approval, restriction or limitation on use or subsequent modifications. If the Consultant is an architect, the Work Product is the property of the Consultant-Architect, and by execution of this Contract, the Consultant-Architect grants the City an exclusive and irrevocable license to use that Work Product. City's alteration of Consultant's Work Product or its use by City for any other purpose shall be at City's sole risk.

Notwithstanding the above, all pre-existing trademarks, services marks, patents, copyrights, trade secrets, and other proprietary rights of Consultant are and will remain the exclusive property of Consultant.

12) Business Tax Registration

The Consultant shall obtain a City of Portland business tax registration number as required by Portland City Code ("PCC") 7.02 prior to beginning work under this Contract.

13) Successors in Interest

The provisions of this Contract shall be binding upon and shall inure to the benefit of the parties hereto, and their respective successors and approved assigns.

14) Severability

The parties agree that if any term or provision of this Contract is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the Contract did not contain the particular term or provision held to be invalid.

15) Waiver

The failure of the City to enforce any provision of this Contract shall not constitute a waiver by the City of that or any other provision.

16) Errors

The Consultant shall, without cost to the City, promptly correct errors or omissions related to the services required by this Contract.

17) Governing Law/Venue

The provisions of this Contract shall be interpreted, construed and enforced in accordance with, and governed by, the laws of the State of Oregon without reference to its conflict of laws provisions that might otherwise require the application of the law of any other jurisdiction. Any action or suits involving any question arising under this Contract must be brought in the appropriate court in Multnomah County, Oregon.

18) Amendments; Minor Amendments

Any changes to the provisions of this Contract's dollar amount, must be made by written amendment and approved by the Chief Procurement Officer or City Council to be valid. Any other changes to the provisions of this Contract, including changes to the scope of work, key personnel, Subconsultants or other changes, must be made by written amendment and approved as pursuant to PCC 5.68 and the PTE Manual.

- (a) <u>Amendment of the Contract</u>. Any material change(s) to the provisions of this Contract shall be in the form of an Amendment. A "material change" means a change that increases risk to the City, or that increases the cost of the Contract to exceed the Contract Price. Amendments must be in writing, must be approved as to form by the City Attorney, and must be executed in writing by authorized representatives of the Parties. Any proposed material amendment to this Contract that does not meet the requirements of this section will be deemed null, void, invalid, non-binding, and of no legal force or effect. "Material Amendment" does not mean a Minor Amendment as described in (b) below and does not mean an administrative change which the City may effect unilaterally. An administrative change means a written Contract change that does not affect the substantive rights of the Parties.
- (b) <u>Minor Amendments to Contract or Change Orders to a Statement of Work</u>. The City and Consultant may make minor changes that do or do not impact the substantive rights or obligations of the Parties but that are not material amendments. Minor Amendments shall be made through the use of a Change Order that modifies a Statement of Work or Task Order. Following mutual approval of the Change Order, the parties will update the SOW to reflect changes to the description of services and any resulting changes to the timeframe of deliverables.

19) Prohibited Conduct

The Consultant shall not hire any City employee who evaluated the proposals or authorized the award of this Contract for two years after the date the Contract was authorized without the express written permission of the City and provided the hiring is permitted by state law.

20) Payment to Vendors and Subconsultants

The Consultant shall timely pay all Subconsultants and suppliers providing services or goods for this Contract. If the Consultant fails to make timely payments to its Subcontractors, Subconsultants, or suppliers, the City is entitled to take any action permitted by law, including, but not limited to, the following:

- (a) Withhold all or part of any progress payment until Consultant makes payment;
- (b) Find that the Consultant is not a qualified bidder for future projects per the City's consideration of the Consultant's record of past performance pursuant to ORS 279C.110(3);
- (c) Directly make payment to the Subcontractor, Subconsultant, and supplier who has not received proper payment; and
- (d) Terminate the Contract for and Event of Default as provided herein.

- **21)** Access to Records and Audits
 - (a) The Consultant and its subconsultants and suppliers shall maintain all fiscal records relating to the Price Agreement in accordance with generally accepted accounting principles. The Consultant and its subconsultants shall maintain all other records necessary to clearly document their performance of the work and any claims for additional compensation or requests for additional contract time arising from or relating to their performance under the Price Agreement.
 - (b) The Consultant shall include in its subcontracts, purchase orders and all other written agreements a provision requiring all subconsultants, material suppliers, providers of rented operated equipment and persons submitting cost or pricing data according to the term of a contract, at all tiers, to comply with this section.
 - (c) The City and its authorized representatives shall have timely access to, and an opportunity to inspect, examine, copy and audit all books and records relating to the Price Agreement, for any reason, upon reasonable notice.
 - Such books and records shall be maintained by the Consultant and all subconsultants, suppliers and persons with cost or pricing data for a minimum period of six (6) years from the date of Final Payment under the Price Agreement, or until the conclusion of any audit, controversy, litigation, dispute or claim arising out of, or related to, the Price Agreement, whichever is longer.
 - ii) The Consultant and all subconsultants, suppliers, and persons with cost or pricing data shall maintain all records in such a manner that providing a complete copy is neither unreasonably time consuming nor unreasonably burdensome for the Consultant or the City. Failure to maintain the records in this manner shall not be an excuse for not providing the records.
 - iii) The Consultant and all subconsultants, suppliers, and persons with cost or pricing data shall produce all such books and records in Portland, Oregon, regardless of whether the records are produced pursuant to this provision of the Price Agreement or as a result of a claim, litigation, arbitration or other proceeding. The Consultant or a subconsultant, supplier, or other person may produce the books and records elsewhere if it fully compensates the City for the reasonable costs of travel to and from the place where the records are produced and the reasonable cost of any employee's time in having to travel.
 - (d) If an audit discloses that payments to the Consultant were in excess of the amount to which the Consultant was entitled, the Consultant shall repay the amount of the excess to the City. Under no circumstances will the payment of previous invoices constitute an acceptance of the charges associated with those invoices.

22) Electronic Signatures

The City and Consultant may conduct this transaction, including any Contract amendments, by electronic means, including through the use of electronic signatures.

23) Merger Clause

This Contract, and the Contract Documents identified at Section 3 above shall be deemed to encompass the entire agreement of the parties and supersede all previous understandings and agreements between the parties, whether verbal or written.

24) Dispute Resolution/Work Regardless of Disputes

The parties shall participate in mediation to resolve disputes before conducting litigation. The mediation shall occur at a reasonable time after the conclusion of the Contract with a mediator jointly selected by the parties. For any claim or dispute that is subject to mediation under this section, the statute of limitations and statute of repose shall not begin to run until the time period set forth in Section 30 below or upon the conclusion of mediation, whichever is later. Notwithstanding any dispute under this Contract, the Consultant shall continue to perform its work pending resolution of a dispute, and the City shall make payments as required by the Contract for undisputed portions of the work. In the event of litigation, no attorney fees are recoverable. No different dispute resolution paragraph(s) in this Contract or any attachment hereto shall supersede or take precedence over this provision.

25) Progress Reports: / Applicable / Not Applicable

If applicable, the Consultant shall provide monthly progress reports to the Project Manager as described in the Statement of the Work and Payment Schedule.

26) Consultant's Key Personnel: / Applicable / Not Applicable

If applicable, the Consultant shall assign the Key Personnel listed in the Statement of the Work and Payment Schedule for the work required by the Contract and shall not change Key Personnel without the prior written consent of the City, which shall not be unreasonably withheld. Notwithstanding anything to the contrary herein, Consultant shall, within 30 (thirty) days of receipt a request from the City replace any Key Person who is not meeting City performance requirements.

The Consultant agrees that the primary personnel assigned to perform the services shall be listed in in the Statement of Work and Consultant shall not change such personnel without the prior written consent of the authorized representative of the City as designated in the SOW. The City will enforce all social equity contracting for Disadvantaged, Minority, Women, Emerging Small Business and Service-Disabled Veteran Business Enterprise (D/M/W/ESB/SDVBE) Subconsultant commitments submitted by the Consultant in its proposals. Failure to use the identified D/M/W/ESB/SDVBE Subconsultants without prior written consent is a material breach of contract.

27) Third Party Beneficiaries

There are no third-party beneficiaries to this Contract. Enforcement of this Contract is reserved to the parties.

28) Conflict of Interest

Consultant hereby certifies that, if applicable, its Contract proposal was made in good faith without fraud, collusion or connection of any kind with any other proposer of the same request for proposals or other City procurement solicitation(s), and that the

Consultant as a proposer competed solely on its own behalf and without connection or obligation to any undisclosed person or firm. Consultant certifies that it is not a City official/employee or a business with which a City official/employee is associated, and that to the best of its knowledge, Consultant, its employee(s), its officer(s) or its director(s) are not City official/employees or a relative of any City official/employee who:

- (a) has responsibility in making decisions or ability to influence decision-making on the Contract or project to which this Contract pertains;
- (b) has or will participate in evaluation or management of the Contract; or
- (c) has or will have financial benefits in the Contract.

Consultant understands that should it elect to employ any former City official/employee during the term of the Contract then that the former City official/Consultant employee must comply with applicable government ethics and conflicts of interest provisions in ORS Chapter 244, including but not limited to ORS 244.040(5) and ORS 244.047, and the City's Charter, Codes and administrative rules, including lobbying prohibitions under Portland City Code Section 2.12.080.

29) Contractual Statute of Limitations/Statute of Repose for Design Services Claims

The statute of limitations applicable to Design Services provided pursuant to this Contract shall be 2 years from the date of final completion of the project. The statute of repose applicable to Design Services provided pursuant to this Contract shall be 10 years from Final Completion of the Project. The statute of limitations and statute of repose set forth herein shall not begin to run until the Project reaches Final Completion, regardless of discovery of any condition, act, error, or omission. This provision shall be included in any Subconsultant agreement executed by the Consultant for the performance of services.

30) Notices and Communications

All notices and other communications concerning this Contract shall bear the Contract number assigned by the City. Notices and other communications may be delivered personally, by facsimile, email, by regular, certified or registered mail or other commercial delivery service. A notice to the City will be effective only if it is delivered to that person designated in writing in either:

- (a) the Notice of Award of this Contract,
- (b) the Notice to Proceed under this Contract, or
- (c) to another individual specifically designated by this Contract.

A notice to the Consultant shall be effective if it is delivered to the individual who signed this Contract on behalf of Consultant at the address shown with that signature, to a corporate officer if Consultant is a corporation, to a general partner if Consultant is a partnership, or to another individual designated in writing by the Consultant in the Contract or in a written notice to the City.

31) Safety

Consultant shall ensure that all Work is performed in a safe manner protective of workers and the environment. Accordingly, Consultant shall maintain in place a safety plan that provides for compliance with all safety laws and regulations in effect during the Term. Consultant shall bear the cost of compliance with its safety plan. The City agrees to increase Consultant's compensation only in the event of a change of law that directly and actually results in an increase in Consultant's costs of compliance with the new law. The City reserves the right but not the obligation to issue a "halt work" order in the event of a potential life safety risk as determined at the City's discretion.

32) Access to Facilities

Consultant agrees that Consultant's physical or remote access to City facilities shall be subject to the security interests and health controls necessary to protect public property, City employees and the public. The City shall not be liable for any delays necessary in granting Consultant access to any portion of the facilities or systems.

33) Force Majeure

For the purpose of this Contract, the term "Force Majeure" shall mean strikes, lockouts, inability to procure materials (but not including changes in cost thereof), inability despite due diligence to obtain required permits, power failure, acts of God, actions or failures to act on the part of local, state, or federal government preventing performance, civil commotion, fire, unavoidable casualty, an outbreak of a pandemic disease, quarantine, unusually severe public health and weather conditions to the extent to which such condition impact the ability of a party performing an obligation hereunder to perform such obligation in accordance with this Contract

34) COVID-19 Requirements

The Parties acknowledge and agree that this Contract will be executed and performed during the COVID-19 pandemic. While Oregon is under a declaration of emergency associated with the COVID-19 pandemic, Consultant shall comply with all applicable requirements and guidance issued by federal, state and local authorities pertaining to COVID-19 (including but not limited to CDC, OHSA, Governor Brown, Oregon Health Authority, and Multnomah County Health Department). The applicable guidance and requirements include, but are not limited to, those pertaining to Oregon phased reopening and sector activities, reduction in gathering sizes appropriate to the type of location and activity, complying and implementing health protocols, maintaining social distancing, and wearing face coverings. Consultant shall have a satisfactory safety plan and protocols addressing COVID-19 precautions related to Consultant's activities under this Contract. Consultant shall monitor for updated guidance and requirements and update its plan and protocols accordingly. Consultant shall provide a copy of Consultant's safety plan and protocols to City upon City's request. Consultant is solely responsible for implementing a COVID safety plan and protocols and addressing any COVID-19 related claims pertaining to its activities and provision of Services under this Contract. In the event that Consultant's employees or its subcontractor's employees exhibit symptoms of COVID infection, Consultant shall follow City's contact tracing and response protocols which shall be made available to the Consultant.

35) Attachments

(a) Exhibit a – Statement of Work
(b) Exhibit b – Compensation
(c) Exhibit c – Consultant' Fee Schedule

CONSULTANT SIGNATURE:

Consultant represents that Consultant has had the opportunity to consult with its own independently selected attorney in the review of this Contract. Neither Party has relied upon any representations or statements made by the other Party that are not specifically set forth in this Contract.

This Contract constitutes the entire agreement between the City and Consultant and supersedes all prior and contemporaneous proposals and oral and written agreements, between the Parties on this subject, and any different or additional terms on a City purchase order or Consultant quotation or invoice.

The Parties agree that they may execute this Contract and any Amendments to this Contract, by electronic means, including the use of electronic signatures.

This Contract may be signed in two (2) or more counterparts, each of which shall be deemed an original, and which, when taken together, shall constitute one and the same agreement.

IN WITNESS WHEREOF, the Parties hereby cause this Contract to be executed.

I, the undersigned, agree to perform work outlined in this Contract in accordance to the Terms and Conditions and the Statement of Work (Exhibit A); hereby certify under penalty of perjury that I/my business am not/is not in violation of any Oregon tax laws; hereby certify that my business is certified as an Equal Employment Opportunity Affirmative Action Employer and is in compliance with the Equal Benefits Program as prescribed by Chapters 5.33.076 and 5.33.077 of Code of the City of Portland; and hereby certify I am an independent consultant as defined in ORS 670.600

FFA ARCHITECTURE AND INTERIORS, INC.

BY:_____Date:_____

Name: <u>Troy Ainsworth, AIA, NCARB</u> Title: Principal CONTRACT NUMBER:

CONTRACT TITLE: MT. SCOTT COMMUNITY CENTER SEISMIC RETROFIT AND EXPANSION PROJECT

CITY OF PORTLAND SIGNATURES:

By:		Date:	
	Bureau Director		
By:	Chief Procurement Officer	Date:	
By:	Elected Official	Date:	
Appro	ved:		
By:	Office of City Auditor	Date:	
Appro	ved as to Form:		
By:	Office of City Attorney	Date:	

Consultant's and City's Project Manager for this Contract are:

For City of Portland:	For Consultant:	
Name: Marlo Medellin	Name: Laura Roark	
Title: Capital Project Manager III	Title: Associate Partner	
Address: 1120 SW 5th Ave., Suite 858	Address: 520 SW Yamhill Street, Suite 900	
City, State: Portland, OR	City, State: Portland, OR	
e-mail: marlo.medellin@portlandoregon.gov	e-mail: Iroark@ffadesign.com	
Copy to:	Copy to:	

PROJECT INFORMATION/BACKGROUND

Consultant shall lead a team in providing and managing full scale architectural design services for development of structural and architectural improvements at the Mt. Scott Community Center and Indoor Pool. Some of the tasks include, but are not limited to, structural improvements, partial reconstruction, and expansion of the 60,744 (gross) square-foot recreation and community center for the City from schematic design through construction document development and construction administration.

The City has commissioned a building assessment and preliminary design analysis that shall form the basis for building reconstruction design. The City seeks to conduct seismic upgrades to bring facility to current structural code by demolishing and reconstructing portions of the structure built prior to 2000.

The Consultant shall:

- Provide design services, including document development and preparation of plans, specifications, and engineer's estimate for the schematic design, design development, construction documents, bid and permit documents for the Mt. Scott Community Center Renovation Project.
- Provide Construction Administration services
- Provide the time and resources required to ensure the collaborative completion of this complex project in accordance with established specifications and plans, delivered on time and within budget.
- Provide commissioning specifications, asset handover and transition to operations services, including asset management planning information and formatted data.

The Consultant, with support from the City, will be expected to conduct an engaging and inclusive design process, present design work to the City and Technical Advisory Committee (TAC) at a minimum of two meetings, and to the general public at one Community Outreach Event. The Consultant will respond thoughtfully and creatively to staff, TAC and public input.

Services under this Contract include, but are not limited to:

• Architecture services (including forensic architecture)

- Structural engineering services;
- Civil engineering services;
- Electrical engineering services;
- Mechanical engineering services;
- Reliability & maintenance engineering services
- Building Information Modeling services;
- Building Energy Modeling services;
- Landscape architecture services;
- Consulting arborist services;
- Permitting services for site development and/or land use permits;
- Site Survey services;
- Geotechnical, environmental and other special Consultant services;
- LEED registration and certification; and
- Architectural cost consulting/estimating services.

The Consultant will provide a multi-disciplinary, integrated approach to design and construction for a high performance building. In accordance with the City or Portland's Green Building Policy this project shall meet LEED BD+C Gold. In addition to meeting LEED BD+C Gold, the Green Building Policy and related City sustainability policies require building projects meet specific performance requirements in the following areas, but not limited to:

- 15% energy savings beyond applicable Oregon Energy Efficient Specialty Code
- Commissioning
- Renewable energy
- Water efficiency
- Ecoroofs
- On-site stormwater management and <u>Salmon-Safe</u> best practices
- Bird-Friendly Design
- Use of native & drought-tolerant plants
- Alternative transportation support
- Material reuse and recycling (minimum 85% percent waste diversion)
- Environmentally preferable, low-carbon, and least-toxic products

Consultant shall comply with all required City of Portland Green Building Policy requirements. To view the specific Green Building Policy requirements, visit

<u>https://www.portlandoregon.gov/citycode/?c=34835&a=54355</u>. To view related City sustainability policies, visit: <u>https://www.portlandoregon.gov/citycode/index.cfm?&c=26818</u>.

SCOPE OF WORK

The Consultant shall provide design services in conjunction with and in coordination with the City's Project Manager for the tasks required. The Consultant shall be expected to work closely with the City's Owner's Representative, City Project Manager, City staff and Community Center staff to accomplish the goals of the project.

The Consultant shall perform the tasks listed below for this project and is expected to work closely with designated City personnel to accomplish these goals. The decision to proceed with each major task will rest solely with the City Project Manager

1. TECHNICAL INVESTIGATION

- 1.1. Existing Conditions Summary
 - 1.1.1. Assemble, review and confirm all relevant data required for site evaluation and the design work. Include previous studies, surveys and plans, record drawings, historical park and neighborhood information, rights-of-way maps, utility information/easements, environmental conditions, soil tests and hazardous materials studies, geotechnical studies or plans, relevant street and utility improvement plans adjacent to the site, transportation, water, stormwater and land use/permitting requirements, non-conforming upgrades, etc.
 - 1.1.2. Document existing park features and street furnishings, paving, and materials as well as the condition of those items. Document the assemblage of relevant information. For City provided items, this can be a list of document titles and their dates, and for information provided by other sources, provide electronic and paper copies to the City, along with a summary of all relevant information and any implications detrimental to the Project's scope of proposed work.
- 1.2. Structural Investigations
 - 1.2.1. Conduct appropriate structural investigation in accordance with City of Portland code requirements and project resiliency goals as required by City of Portrland Code to address seismic integrity of entire building, including natatorium, locker rooms, gymnasium and skating rink.
 - 1.2.2. Evaluate roof stability at area above pool shower rooms and determine best approach to address conditions. Approach should address safety, risk, longevity, and cost.
- 1.3. Perform a geotechnical investigation by boring, sampling, and testing of the soil and rock strata to establish the soil and rock foundation characteristics for the analysis for community center design. Consultant shall provide a geotechnical engineering report for any completed subsurface exploration, laboratory testing or geotechnical analysis.

The geotechnical engineering report shall include, as applicable, the following field and laboratory information:

- 1.3.1. Discussion of geotechnical analysis
- 1.3.2. Geotechnical recommendations
- 1.3.3. Boring logs
- 1.3.4. Density and moisture content of undisturbed samples
- 1.3.5. Soil classification data
- 1.3.6. Other information necessary to conduct building design

Prior to submitting a final report, Consultant shall submit a draft report to the City for review and approval.

1.4. Stormwater Management Assessment

Conduct a stormwater management assessment per most current City of Portland Stormwater Management Manual

- 1.5. Tree Assessment Survey
 - 1.5.1. Establish project site boundaries and conduct a tree assessment for the site trees and ROW trees performed by a certified arborist.
 - 1.5.1.1. Size
 - 1.5.1.2. Species
 - 1.5.1.3. General condition
 - 1.5.1.4. Observable defects
 - 1.5.1.5. Potential impact to each tree from proposed Project
 - 1.5.2. Key each tree to the site survey, along with any locations of overhead power lines or obstructions.
 - 1.5.3. Document tree information on current City of Portland Urban Forestry tree inventory spreadsheet.
 - 1.5.4. Prepare a summary report per current City of Portland guidelines.
- 1.6. Deliverables Technical Investigation Reports as outlined above.
 - 1.6.1. Structural/Seismic Evaluation
 - 1.6.1.1. Draft 1 hard copy and electronic pdf format
 - 1.6.1.2. Final 2 bound, hard copies and electronic pdf format
 - 1.6.2. Geotechnical Investigation Report
 - 1.6.2.1. Draft 1 hard copy and electronic pdf format
 - 1.6.2.2. Final 2 bound, hard copies and electronic pdf format
 - 1.6.3. Stormwater Assessment Report
 - 1.6.3.1. Draft 1 hard copy and electronic pdf format
 - 1.6.3.2. Final 2 bound, hard copies and electronic pdf format
 - 1.6.4. Tree Survey/Assessment Portland Parks & Recreation Forestry spreadsheet and pdf formats
 - 1.6.4.1. Draft electronic pdf format
 - 1.6.4.2. Final 1 hard copy and electronic pdf format
- 2. HIGH PERFORMANCE BUILDING PLAN AND TECHNICAL REQUIREMENTS
- 2.1. The Consultant shall prepare, for City review and approval, a Resilience Measures Outline and a High-Performance Building Outline that identifies technical requirements and performance metrics for a high-performance building such as the National Performance Based Design Guide or approved comparable. At minimum Outline shall set criteria for the following:
 - 2.1.1. Whole Building Energy Performance

- 2.1.2. Site and Irrigation
- 2.1.3. Structural Engineering
- 2.1.4. Building Enclosure/Envelope
- 2.1.5. Interior Systems Construction Products and Finish Materials.
- 2.1.6. Mechanical Engineering
- 2.1.7. Lighting Design Interior and Exterior
- 2.1.8. Electrical Engineering
- 2.2. Upon City approval of Outlines above, Consultant shall prepare, for City review and approval, a High-Performance Building Plan that clearly identifies site-specific implementation strategy including site disturbance minimization, operating energy goals, redundant power, seismic performance, pathogen-prevention air filtration, building envelope attributes, environmental impacts, water management opportunities, construction opportunities, commissioning opportunities, operations and maintenance opportunities, and estimated associated costs.
- 2.3. The Consultant shall apply as minimum for design the space program from the Program Space Requirements, per RFP. All required elements of the facility must be identified and planned for appropriately.
- 2.4. The Consultant shall lead one meeting with the City's staff to refine and finalize Program space summary establishing specific spaces and relationships to develop the schematic design direction for the project. Consultant shall document meeting minutes and submit summary of concerns and recommendations for City approval.
- 2.5. Deliverables
 - 2.5.1. High Performance Building Plan Outline draft- pdf format
 - 2.5.2. High Performance Building Plan Outline final- pdf format
 - 2.5.3. Schedule draft MS Project
 - 2.5.4. Schedule final MS Project
 - 2.5.5. Site-specific High Performance Building Plan draft- pdf format
 - 2.5.6. Site-specific High Performance Building Plan final- pdf format
- 3. SITE ASSESSMENT AND SURVEY

The purpose of this task is to establish site conditions and provide a comprehensive report of conditions affecting the project site.

- 3.1. Site survey shall be conducted based on City of Portland datum. Data files shall be developed using AutoCAD and Revit in such a manner as to allow future management by City staff or designated representative.
- 3.2. The Consultant team shall visit the site and conduct research and professional services to become fully informed of conditions affecting the site and obtain sufficient information to permit the complete design of the project. Consultant shall be solely responsible for determining the level of information required for City of Portland permit approval. Consultant shall submit a Site Assessment and Survey Report to include the following:

- 3.2.1. Identification of improvements required by the City of Portland bureaus and ordinances including but not limited to planning, transportation, environmental, development, zoning, right-of-way, master plans, stormwater and other documents and ordinances that together comprise the City of Portland codes and regulations.
- 3.2.2. Identification of improvements required by approved rezoning plans, existing conditions and existing agreements.
- 3.2.3. Existing conditions including a description of all structures and their general condition and existing vegetation.
- 3.2.4. Evidence of existing or abandoned wells, septic tanks, and leach fields
- 3.2.5. Evidence of trash or construction debris on site, petroleum or chemical spills, and stockpiled soil or construction material
- 3.2.6. Site limitations such as stormwater, water, sewer, electric and gas limitations
- 3.2.7. Results of a title search identifying easements, covenants, use restrictions, or other encumbrances on the property
- 3.2.8. Comments/suggestions collected
- 3.2.9. Identify problem areas/questions, if any
- 3.2.10. Unique site features which may affect the construction
- 3.2.11. Unique site features which may necessitate any federal, state or local permits. Identify permits and certifications required for construction including but not limited to wetlands, grading, State Health Department and PBOT permits. All required permits, certifications and applications to be prepared and obtained by the Consultant
- 3.2.12. Identify roadway improvements required for site access, including any signalization
- 3.2.13. Identify any cultural resource issues.
- 3.2.14. Identify wetlands, flood plains and all environmental issues.
- 3.2.15. Identify current zoning and if proposed use is permitted by right, Special Exception, or land use approval. Review prior zoning/building plans/ land use decisions to identify any outstanding issues. List setbacks associated with base zone. Identify any overlay districts and any additional setbacks beyond base zone setbacks.
- 3.2.16. Research prior zoning/ building plans/land use decisions and identify potential outstanding issues including non-conforming improvements.
- 3.3. The Survey shall cover the following areas at a minimum:
 - 3.3.1. Existing conditions including all structures and existing vegetation.
 - 3.3.2. Existing or abandoned wells, septic tanks, and leach fields
 - 3.3.3. Site utilities such as stormwater, water, sewer, electric and gas
 - 3.3.4. Supplement existing utility plans to compile a complete survey of existing utilities to remain, including capacity and/or initial identification of private utility requirements as necessary.

- 3.3.5. Results of a title search identifying easements, covenants, use restrictions, or other encumbrances on the property
- 3.3.6. ALTA survey to include topography with minimum of 2' contours, existing utilities with invert elevations (where accessible) with 24-inch gridlines and elevations referenced to mean low water/sea level; also indicate 100-year flood plain elevation and RPA lines and any other easements, site limits. Topographical survey shall be on a reproducible 22x34 inch sheet plus CADD file on CD. Reduce this sheet so it will fit in the written site survey report.
- 3.3.7. Obtain any existing drawings, to scale, of existing site and adjacent infrastructure improvements.
- 3.3.8. Obtain any existing environmental or cultural resource assessments performed on the property.
- 3.3.9. Unique site features which may affect the construction
- 3.3.10. Unique site features which may necessitate any federal, state or local permits.
- 3.3.11. Identify cultural resource issues.
- 3.3.12. Identify wetlands, flood plains and all environmental features.
- 3.3.13. Identify current zoning.
- 3.3.14. Research prior zoning/ building plans/land use decisions and identify potential outstanding issues including non-conforming improvements.
- 3.4. Deliverables
 - 3.4.1. Survey electronic AutoCAD and Revit format
 - 3.4.1.1. Draft electronic, original format for City review
 - 3.4.1.2. Final electronic, original format
 - 3.4.2. Supplementary Existing Conditions Report
 - 3.4.2.1. Draft 1 hard copy 8 ½"x11" w/supplementary maps 11"x17", electronic pdf, and original format
 - 3.4.2.2. Final 1 hard copy 8 ½"x11" w/supplementary maps 11"x17", electronic pdf, and original format

4. SCHEMATIC DESIGN

Upon City approval of the High Performance Building Plan, Site Assessment Survey, and Technical Investigation tasks, the Consultant shall proceed with Schematic Design development based on input received in tasks 1-3.

- 4.1. Design Charrettes: Lead/facilitate two (2) multi-day design charrettes with the City's staff and stakeholders to develop the overall schematic design direction for the project. Consultant shall develop, with City agreement, charrettes' plan and agenda. The design work charrette shall address, at minimum, the following key items:
 - 4.1.1. Goals
 - 4.1.2. Programming

- 4.1.3. Site assessment/site limitations
- 4.1.4. Regulatory requirements
- 4.1.5. Costs
- 4.1.6. Design options
- 4.1.7. Integrated design
- 4.1.8. Mechanical systems
- 4.1.9. Operations
- 4.1.10. Preferred design options

Based on meeting with City's staff, prepare a minimum of three (3) different schemes showing block layout floor plans, conceptual elevations, and site plan sketches for presentation and discussion with City's staff. The first charrette will be to review schemes and select the most appropriate concept(s) to further develop. The presentation of each scheme must address LEED strategies and daylighting, functional requirements, adjacencies, building siting strategies, security requirements, discussion of operating impacts for Park staff, and construction costs. All concepts shall address any issues uncovered in the discovery phase under tasks 1-3. Consultant is solely responsible for ensuring design schemes are feasible and permittable within construction budget. Discussions shall also include the relative costs, strengths, and weaknesses of each alternative.

The second charrette will be scheduled two weeks after the initial charrette. Consultant shall incorporate City's comments, considerations and selections, and make modifications into CAD format. Revisions to plans and elevations shall be discussed with City staff by Consultant, and major systems and energy reduction discussions will take place.

Submit final preferred alternative for review, comments and approval by City prior to moving forward with Schematic Design. The Consultant shall revise alternatives as necessary for City review and approval prior to final development of schematic design.

Provide a written report including graphics of the findings/summary of all charrettes within ten (10) days of final charrette.

4.2. Schematic Design Package: Based on all project input provided to-date, including commentary from the design charrettes and report, prepare a Schematic Design package to represent the "whole building" design approach for the preferred scheme reviewed in the charrettes. Incorporate City feedback, comments, Charrette results, and all relevant project discovery information.

Prepare the Schematic Design package and report, to include the following:

- 4.2.1. Site plan drawing which shall include:
 - 4.2.1.1. Magnetic North
 - 4.2.1.2. Property address
 - 4.2.1.3. Property lines
 - 4.2.1.4. Graphic Scale: Minimum 1-inch equals 20 feet
 - 4.2.1.5. Legend
 - 4.2.1.6. Footprint of structure with dimensions to property lines and other structures

- 4.2.1.7. Label all existing built features (landings, walkways, stairs, ramps, exterior doors swing, etc.)
- 4.2.1.8. Street names
- 4.2.1.9. Existing spot elevations with benchmark and survey data
- 4.2.1.10. Existing ground elevation contours
- 4.2.1.11. Building finish floor elevations and finish grade elevations
- 4.2.1.12. Easement types and locations (water, sewer, power, access, etc.)
- 4.2.1.13. Site and parking layout including accessible spaces and aisles, accessible routes and entrances, etc.)
- 4.2.1.14. Existing utilities with future and new utility connections
- 4.2.1.15. Identify existing zoning, zoning impacts and any modification requirements
- 4.2.2. Schematic floor plans and elevations. Building concept to include the following:
 - 4.2.2.1. Floor plans showing functional areas and relationships at a scale of 1/8 inch equals 1 foot.
 - 4.2.2.2. Building elevations
 - 4.2.2.3. Building sections
 - 4.2.2.4. Gross space tabulations
 - 4.2.2.5. Opinion of probable cost for selected scheme
 - 4.2.2.6. Identify several deduct alternates for bidding
 - 4.2.2.7. For sheets with match lines, show site location key on each sheet
 - 4.2.2.8. Identify code compliance requirements of the design and construction of the project.
 - 4.2.2.9. Identify and describe all sustainable design strategies being considered for the project and coordinate cost information for review by the City.
- 4.2.3. Report Narrative to include the following:
 - 4.2.3.1. Identify code compliance requirements of the design and construction of the project.
 - 4.2.3.2. Identify and describe all sustainable design strategies being considered for the project and coordinate cost information for review by the City. Describe building orientation, sustainable site strategies and energy conservation/renewable resource strategies. Include a preliminary LEED Scorecard.
 - 4.2.3.3. Discuss measures to best utilize daylighting and to reduce solar heat gain.
 - 4.2.3.4. Discuss option for low impact development and storm water management.
 - 4.2.3.5. Identify major building system selections to be made by City, including but not limited to:
 - 4.2.3.5.1. HVAC systems,

- 4.2.3.5.2. roofing,
- 4.2.3.5.3. exterior wall systems,
- 4.2.3.5.4. plumbing and
- 4.2.3.5.5. lighting.
- 4.2.3.6. Discuss security strategies and elements for the physical security, electronic security, etc. Discuss options for each and first-cost and life cycle cost comparisons.
- 4.2.3.7. Discuss resiliency and maintainability strategies.
- 4.2.3.8. For HVAC systems, identify three (3) operating concepts for the facility to be further evaluated during MEP Systems Selection task. Discuss how HVAC systems meet other City of Portland requirements including Green Building Policy, bird-friendly design, LEED, etc.
- 4.2.4. Construction Cost Estimate for the scheme(s) in CSI format.
- 4.2.5. Design/Construction Schedule in MS Project confirming that the project is proceeding per the schedule included in the SOW or per the schedule discussed at the project kickoff meeting.
- 4.2.6. Preliminary Furniture, Fixtures and Equipment (FFE) list necessary for the project and estimated cost information for the City's review.
- 4.3. Meetings: Consultant shall conduct one plan review meeting two (2) weeks post submittal with the purpose of presenting SD package to City staff.
- 4.4. Plan Review: Consultant shall facilitate a Plan Review charrette and catalogue design review comments in City's feedback database form or other electronic format approved by City. City's review of comments in the form of marked up drawings, specifications and written comments will be returned to the Consultant after every submittal. Review comments shall be provided by the City to Consultant 7 days post review meeting. The Consultant shall incorporate the City's comments into the design documents after every review. The Consultant shall respond to the comments in writing in the electronic template approved by the City after every review explaining that each item has been incorporated into the documents or will explain why it was not. The Consultant design team shall include a Quality Control (QC) program at each submittal during the Design Documents phase. The City's Project Manager may request verification of the Consultant's QC review. The objective for the City is for the Consultant to produce fully coordinated construction documents.
- 4.5. The Consultant shall produce a design that includes Sustainable Procurement best practices as they apply to the project. For information about, or assistance with, including sustainability in the technical requirements, deliverables or evaluation criteria, please visit the Sustainable Procurement Program website at https://www.portlandoregon.gov/brfs/37732.
- 4.6. Certification/Green Design Requirements:
 - 4.6.1. In accordance with the City's Green Building Policy this project shall meet LEED BD+C Gold. In addition to meeting LEED BD+C Gold the Green Building Policy and related City sustainability policies require building projects meet specific performance requirements in several environmental areas. To view the specific Green Building Policy requirements, visit https://www.portlandoregon.gov/citycode/?c=34835&a=54355.

- 4.6.2. LEED CERTIFICATION: The City requires the Consultant to provide a fully LEED NC Gold Certifiable project and register and document all LEED credits with USGBC per their online program. The Consultant is required to incorporate LEED updates and discussions into all meetings and design content, to delegate LEED templates to team members, to review all completed template information (including verifying that the General Contractor is completing all required template information for LEED credit) and correct as needed and to manage the entire LEED process throughout the design and construction of the project. The City will pay for application and certification costs to the USGBC.
- 4.6.3. Provide Professional Energy Modeling Services that assist Consultant and City team in meeting City of Portland energy reduction goals of 30% energy cost savings beyond applicable LEED baseline requirement through an integrated design approach for all building disciplines and building components. Energy modeling shall start at concept design and shall assist the Consultant with design elements such as building orientation and fenestration. Energy Modeling shall continue through final construction documents and shall be used to assist design team in selection of building thermal envelope, HVAC systems and renewable energies, if utilized. Energy modeling reports to be submitted to the City at appropriate project submissions, but not less than 35%, 75% and Permit documents.
- 4.7. Formal Presentations:

Prepare required documents, visual aids, and participate in two (2) formal presentations to the community. Typical presentation materials will include rendered site plan, building elevations and 3D image(s).

- 4.7.1. Presentation materials shall be developed and illustrated with presentation quality color graphics of site plans, sections, site elevations, various architectural perspectives with appropriate detail, along with furnishings and materials palette. Presentation materials shall also be delivered to the City in web-ready content.
- 4.7.2. Presentations may be to the community, groups, neighbors, etc.
- 4.7.3. Collect, analyze and summarize community input. Provide responses to community input in summary format to the City.
- 4.7.4. All presentations required for approval by authorities having jurisdiction shall be included within the associated tasks and shall be provided by the Consultant at no additional costs to the City.

4.8. Deliverables

- 4.8.1. Design Charrette Presentation 1
 - 4.8.1.1. PDF presentation boards 22"x34" for three (3) design schemes.
 - 4.8.1.2. Electronic presentation
- 4.8.2. Draft MS PowerPoint
- 4.8.3. Final MS PowerPoint
- 4.8.4. Design Charrette Presentation 2
 - 4.8.4.1. Design Scheme(s) pdf presentation boards 22"x34"

4.8.4.2. Electronic presentation

- 4.8.5. Draft MS PowerPoint
- 4.8.6. Final MS PowerPoint
- 4.8.7. Preferred Alternative Summary4.8.7.1. Draft pdf format
 - 4.8.7.2. Final pdf format
- 4.8.8. Design Charrette Report
 - 4.8.8.1. Draft pdf format
 - 4.8.8.2. Final pdf format
- 4.8.9. Schematic Design Package
 - 4.8.9.1. Full size plans 22"x34" 2 copies
 - 4.8.9.2. Half size plans 11"x17" 10 copies
 - 4.8.9.3. Electronic pdf format
 - 4.8.9.4. Presentation boards 22"x34" 2 boards; electronic format in original format
 - 4.8.9.5. Schematic Design Report Narrative pdf format
 - 4.8.9.6. Cost estimate (CSI format) pdf format
 - 4.8.9.7. Schedule 1 hard copy; electronic MS Project format
 - 4.8.9.8. Quality Control Review certification statement pdf format
 - 4.8.9.9. Energy Modeling Report 2 hard copies; electronic pdf format
 - 4.8.9.10. LEED Scorecard electronic original format or pdf
 - 4.8.9.11. FFE list pdf
 - 4.8.9.12. Meeting minutes pdf format
 - 4.8.9.13. Public presentation documents MS PowerPoint and pdf
 - 4.8.9.14. Community Input Summary pdf and original format
 - 4.8.9.15. Monthly project status reports pdf format

5. LAND USE REVIEW SUBMISSION:

- 5.1. The Consultant will be responsible for scheduling the pre-application meeting and preparing pre-application application package for submittal to City of Portland permitting bureau.
- 5.2. Preparation of the necessary drawings and documentation is included as part of this task. The Consultant is responsible for determining all City, County, utility providers and PBOT site development requirements applicable to the project including environmental impacts/constraints, non-conforming improvements, easements, attending all coordination/issues meetings with the City, utility providers and referral agencies, and

furnishing a complete site development plan to ensure that site plan approval does not adversely impact the construction schedule of the project.

- 5.3. The Consultant will be responsible for responding to all review comments. Consultant shall coordinate review comments through the City. The City shall approve all changes and responses prior to submittal to permitting agencies.
- 5.4. The Consultant is responsible for confirming all submission requirements with the City of Portland permitting department including number of review sets, signature requirements, etc.
- 5.5. Deliverables
 - 5.5.1. Site Plan pdf format
 - 5.5.2. Land Use Review submittals per City of Portland requirements
 - 5.5.3. Electronic pdf format of all submitted documents
- 6. MEP SYSTEMS SELECTION

Understanding the interaction between the building's mechanical systems, energy requirements and physical design will be an integral component of the mechanical, electrical and plumbing systems selection.

Between the approval of the Schematic Design Package and prior the submission of the Design Development Package, the Consultant shall conduct life-cycle and energy use analysis for MEP systems evaluation. Consultant shall submit MEP analysis results and materials recommendations for the City's selection of the final building systems. Upon the City's approval of building systems, Consultant shall incorporate MEP selections in DD design.

Life-Cycle Cost Analysis, LEED and Building Energy Modeling (BEM): The objective of the Life-Cycle Cost Analysis, LEED and Building Energy Modeling is to evaluate building envelope and building systems in an integrated approach to develop sustainable strategies, to evaluate building elements and systems for City energy conservation goals, to review life cycle costs associated with design strategies/decisions, and to assist in the LEED certification process.

- 6.1. Develop a summary, in table format, outlining Energy Conservation Measures possible for proposed community center design. At minimum, include the following conservation elements for each conservation measure:
 - 6.1.1. Conservation measure description
 - 6.1.2. Annual utility costs
 - 6.1.3. Cost savings
 - 6.1.3.1. \$/year saved
 - 6.1.3.2. Implementation cost
 - 6.1.3.3. Potential utility rebates
 - 6.1.3.4. Additional operating + maintenance savings
 - 6.1.4. Energy savings
 - 6.1.4.1. Electric kWh saved
 - 6.1.4.2. Electric kW saved
 - 6.1.4.3. HVAC Mbtu saved

6.1.5. Economics

6.1.5.1. Simple payback (years)

Evaluate the life-cycle cost energy savings applying Energy Conservation Measures including operation and maintenance cost savings in accordance with U.S. DOE Federal Energy Management Program (FEMP) guidelines.
 Coordinate and prepare the work to be within construction cost limitations.

The Life-Cycle Cost Analysis, LEED and Building Energy Modeling analysis shall consider and include the following:

- 6.2.1. Provide for optimum energy efficiency using the following criteria:
 - 6.2.1.1. Minimize building life-cycle cost over 20 years
 - 6.2.1.2. Maximize net savings over 20-year study period
 - 6.2.1.3. Current cost versus historical high
 - 6.2.1.4. Minimize simple payback period in years
 - 6.2.1.5. Percent of Energy Savings
 - 6.2.1.6. Minimize discounted payback period
 - 6.2.1.7. Maximize adjusted internal rate of return on investment
 - 6.2.1.8. Take into account utilities on site, gas and electric.
 - 6.2.1.9. Economic comparison of alternatives.
 - 6.2.1.10. Monthly utility cost graph.
 - 6.2.1.11. Annual operating cost graph.
- 6.3. The package shall include Life-Cycle Cost Analysis for MEP systems that provide energy conservation opportunities.
 - 6.3.1. Include in the analysis for each building system studied, an itemized estimate of all major system component and/or materials and their annual operating and maintenance costs broken down by quantity, hours per year, and total annual cost. Also include all non-annual repair and replacement costs itemized annually over the study period along with anticipated life span of each system and/or material.
 - 6.3.2. Minimum required service sizes for domestic water, fire service, the need for fire pump, etc. Submit all calculations to the City for verification.
 - 6.3.3. Load requirements for power and for emergency generation or battery backup system.
 - 6.3.4. Provide a detailed feasibility study that discusses the cost, advantages and disadvantages of each system. Include discussion of opportunities and tradeoffs associated with high-filtration and other strategies Include narrative discussion of any LEED related considerations, relative costs and implications to sizing of systems or utility services.
 - 6.3.5. Calculate annual energy consumption/performance for each building system using a commercially available energy simulation program, such as Carrier HAP, Trane Trace, DOE 2.1, Power DOE, EnergyPlus, Energy-10, or BLAST, latest version.

- 6.3.6. The building systems which are studied shall include all energy using components and shall consider alternatives for energy efficient lighting, fuel sources, renewable energy sources, plug load, HVAC system types and combinations, HVAC and lighting control systems, building envelopes and orientations, including glazing, walls, roofs and materials. Include in final report, discussion of all systems and components studied even if not selected.
- 6.4. Provide draft report for the City's review and comments, including summary, MEP Systems Selection recommendations, appendices, graphics, and electronic copies of all computer-generated data.
- 6.5. The City shall review draft MEP Systems Selection Package prior submittal of final package. Allow 3 weeks for the City's review and comment. Consultant shall provide written responses to comments prior to submittal of final package.
- 6.6. Deliverables
 - 6.6.1. Life Cycle Cost Analysis, LEED and Building Energy Modeling Report

6.6.1.1. Draft – pdf

6.6.1.2. Final – 2 hard bound copies; pdf format

- 6.6.2. Energy Simulation Report pdf format or original format
- 6.6.3. Meeting Minutes Report pdf format
- 7. DESIGN DEVELOPMENT TASK (35% Construction Documents)
- 7.1. Based on the City's review and written approval of Schematic Design Documents and MEP Systems Selection Package, the Consultant shall prepare Design Development Documents consisting of drawings and other documents to describe the size and character of the entire project as to architectural, structural, mechanical and electrical systems, security systems, materials and such other elements as may be appropriate.
- 7.2. The Design Development efforts must confirm all specific functional requirements, FFE planning requirements, systems and equipment requirements, etc.
- 7.3. The Consultant shall provide for one progress review meeting with the City's Project Manager at the midpoint of the Design Development task period. This is required before the 35% Development Document package will be accepted.
- 7.4. The Consultant shall prepare outline specifications including the City's provided General Conditions and technical specifications setting forth the basic requirements of the facility and including catalog cuts of systems basic equipment. The Consultant shall provide an outline of furniture specifications (if required) and proposed color boards for the City's review and approval.
- 7.5. The City's review submission packages require a 3-week review. The City will provide review comments to be incorporated into Design Development plans. During the review time the Consultant shall continue working on the Design Development plans. Submission requirements are described at the end of this section.
- 7.6. The Consultant shall prepare a cost estimate in CSI format utilizing the services of an independent professional cost estimator. Submit cost estimate at progress review meeting with the City's Project Manager at the midpoint of the Design Development task period.

- 7.7. Design/Construction Schedule in MS Project confirming that the project is proceeding per the Concept Design Schedule.
- 7.8. The Consultant shall make such adjustments as are necessary in the project plans and specifications to conform to the limits of the cost provided in the proposal and shall cooperate and coordinate with the City in determining Value Engineering reductions required, if any. The City shall reserve the right to submit all materials for third party review. Consultant shall not proceed with Design Development Documents until such time that plans and specifications conform to the limits of the cost provided in the proposal.
- 7.9. The Consultant is responsible for coordinating with the City and utility companies to identify existing utilities, required relocations, and utility requirements for this facility.
- 7.10. Consultant shall conduct a presentation to City staff for purpose of reviewing proposed equipment for electronic and physical security, audio-visual, energy management; and proposed major building materials selections and finishes selections. The City will provide comments and selection recommendations to Consultant within 7 days post meeting. Consultant shall integrate the City's comments in final Design Development plans.
- 7.11. When Design Development Drawings are complete to the 35 percent stage, drawings shall include at least the following:
 - 7.11.1. Site Plans Provide separate site plans for the following disciplines:
 - 7.11.1.1. Civil
 - 7.11.1.2. ROW
 - 7.11.1.3. Landscape
 - 7.11.1.4. Site plans shall include all plan requirements for City of Portland permitting bureau review with cover sheet and the following:
 - 7.11.1.4.1. Magnetic North
 - 7.11.1.4.2. Engineering Scale: 1-inch equals 20 feet or as required by the review agency
 - 7.11.1.4.3. Graphic scale, legend, vicinity map
 - 7.11.1.4.4. Existing elevations with benchmarks and survey data
 - 7.11.1.4.5. New elevations to include two-foot contour intervals (one-foot contour interval lines for slopes less than 2%) and finished floor elevations
 - 7.11.1.4.6. Existing and new utilities indicating connections
 - 7.11.1.4.7. Existing and new structures
 - 7.11.1.4.8. Existing and new roads
 - 7.11.1.4.9. Parking areas with spaces
 - 7.11.1.4.10. Building location, dimensionally
 - 7.11.1.4.11. Pertinent grades, adjacencies, setbacks, easements etc.
 - 7.11.1.4.12. Paths, ramps, stairs, curbs

- 7.11.1.4.13. Location of site fixtures such as light fixtures, benches, railings, trash enclosures, generators etc.
- 7.11.1.4.14. Easement plat (if required)
- 7.11.1.4.15. Existing and new landscape areas including:
 - 7.11.1.4.15.1. Plant species
 - 7.11.1.4.15.2. Layout
 - 7.11.1.4.15.3. Spacing
- 7.11.1.4.16. Security measures in accordance with City of Portland Crime Prevention Through Environmental Design (CPTED) guidelines.
- 7.11.1.4.17. Tree protection plans
- 7.11.1.4.18. Erosion control plans
- 7.11.2. Building Plans:
 - 7.11.2.1. Floor plans at 1/8" or 1/4" showing:
 - 7.11.2.1.1. Major dimensions
 - 7.11.2.1.2. Building footprint
 - 7.11.2.1.3. Exterior wall type, thickness, composition with physical security features identified
 - 7.11.2.1.4. Structural system with fixed grid and column sizes
 - 7.11.2.1.5. Major mechanical/electrical systems and their requirements
 - 7.11.2.1.6. Reflected ceiling plans
 - 7.11.2.1.7. Building core w/stairs, shafts, elevators etc developed
 - 7.11.2.1.8. Built-in furniture and equipment
 - 7.11.2.1.9. Room names, numbers and space tabulations
 - 7.11.2.1.10. Finish board including exterior and interior material selection
 - 7.11.2.1.11. Location of new furniture required
- 7.11.3. Elevations showing:
 - 7.11.3.1. All fenestration and building materials
 - 7.11.3.2. Building overall heights and finished floor heights
 - 7.11.3.3. Section cut locations
- 7.11.4. Building sections showing:
 - 7.11.4.1. Foundation and structural systems
 - 7.11.4.2. Typical wall construction including exterior and interior
 - 7.11.4.3. Masonry coursing
 - 7.11.4.4. Parapet or overhang design

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- 7.11.4.5. Ceiling heights, clerestory windows, architectural elements
- 7.11.4.6. Schedules
- 7.11.4.7. Interior finishes
- 7.11.4.8. Frame and door
- 7.11.4.9. Window and glazing
- 7.11.5. Structural drawings at 1/8" or 1/4" showing:
 - 7.11.5.1. Typical and non-typical framing
 - 7.11.5.2. Slab design
 - 7.11.5.3. Roof connections
 - 7.11.5.4. Beam sizes
 - 7.11.5.5. Column grid
 - 7.11.5.6. Preliminary details
- 7.11.6. MEP drawings at 1/8" or 1/4" showing:
 - 7.11.6.1. Major shafts and chases, sized
 - 7.11.6.2. Mechanical, Electrical and Telecom rooms, sized
 - 7.11.6.3. HVAC equipment locations, nominal sizes and proposed capacities of mechanical and electrical equipment
 - 7.11.6.4. Fire detection and protection systems
 - 7.11.6.5. Design calculations including electrical load and fault current analysis
 - 7.11.6.6. Lighting plans, power distribution and lighting cut sheets
 - 7.11.6.7. Communication System(s) rough-ins (j-boxes, conduit, etc.)
 - 7.11.6.8. Electronic Security
 - 7.11.6.9. Audio-Visual Plan, to include PA/alerting/call notification systems, projection if needed
 - 7.11.6.10. Plumbing plans, plumbing fixture schedule, cut sheets
 - 7.11.6.11. Flow diagrams of mechanical systems
 - 7.11.6.12. Exterior louver requirements
 - 7.11.6.13. Roof top equipment, vents, etc.
- 7.11.7. Complete list of all anticipated technical specification sections.
- 7.11.8. Major Systems Report including discussion of major systems as follows:
 - 7.11.8.1. Materials of construction
 - 7.11.8.2. Fenestration
 - 7.11.8.3. Foundation
 - 7.11.8.4. Framing

- 7.11.8.5. Mechanical systems
- 7.11.8.6. Lighting and power distribution
- 7.11.8.7. Incoming Electrical and COMM services & their locations on Site
- 7.11.8.8. Internal and external power distribution systems
- 7.11.8.9. Fire detection and protection systems
- 7.11.8.10. Building Envelope
- 7.11.8.11. Physical Security Systems
- 7.11.8.12. Communications, to include phone system
- 7.11.8.13. Audio / Visual
- 7.11.8.14. Electronic Security, Doors and Hardware
- 7.11.8.15. Cost estimate, including a line-by-line project cost.
- 7.11.8.16. Design calculations.
- 7.11.8.17. Electrical load and fault current analysis.
- 7.12. <u>Updated Life-Cycle Cost Analysis, LEED and Building Energy Modeling:</u> Based on the approved system selected during the MEP Systems Selection Task, provide updates to the Life-Cycle Cost Analysis, LEED and Building Energy Model.
 - 7.12.1. Provide final report, including summary, appendices, graphics, and electronic copies of all computer-generated data.
- 7.13. Meetings: Consultant shall facilitate a Plan Review charrette 2 weeks post submittal with the purpose of presenting DD package to the City's staff. Consultant shall capture all feedback and responses and document all comments from charrette in the electronic template approved by the City.
- 7.14. Plan Review: Additional City review comments provided in the form of marked up drawings, specifications and written comments will be returned to the Consultant after every submittal. Review comments shall be provided by the City to Consultant 7 days post review meetings. The Consultant shall incorporate the City's comments into the design documents after every review. The Consultant shall respond to the comments in writing to the City after every review explaining that each item has been incorporated into the documents or will explain why it was not. A comment review meeting with the City might be necessary if the City's comments cannot be incorporated to discuss reason/impact. The Consultant design team shall include a Quality Control (QC) program at each submittal during the Design Documents phase. The City's Project Manager will request verification of the Consultant's QC review. The objective for the City is for the Consultant to produce fully coordinated construction documents.
- 7.15. Consultant shall provide written monthly project status reports throughout the Project.
- 7.16. Deliverables
 - 7.16.1. Midpoint Progress Meeting Summary pdf format
 - 7.16.2. Review Comments response sheet from SD review
 - 7.16.3. Full size plans 22"x34" 2 copies

- 7.16.4. Half size plans 11"x17" 5 copies
- 7.16.5. Electronic pdf format
- 7.16.6. Specifications Outline pdf format
- 7.16.7. Cost estimate updated from SD pdf format
- 7.16.8. Schedule updated from SD 1 hard copy; electronic MS Project format
- 7.16.9. Quality Control Review certification statement pdf format
- 7.16.10. Life-Cycle Cost Analysis updated pdf format
- 7.16.11. LEED and Building Energy Modeling Report updated 2 hard copies; electronic pdf format
- 7.16.12. LEED Scorecard updated electronic original format or pdf
- 7.16.13. Utility Company contact list pdf format
- 7.16.14. AV outline pdf format
- 7.16.15. FFE color boards original format; electronic pdf format
- 7.16.16. Meeting minutes pdf format
- 7.16.17. Monthly project status reports pdf format
- 8. CONSTRUCTION DOCUMENTS TASK (75%, 95% and 100% Construction Documents) This task consists of developing the approved Design Development Package into completed construction drawings and specifications that can be approved for construction by permitting bureau. Consultant is solely responsible for providing plans, specification and estimate that complies with permitting agencies' code requirements and the City's budget. The City reviews are included in this task at the 75, 95, and final 100 percent stages. The City review submission packages each require a three-week review period. Consultant shall not proceed with design progress between tasks until written approval has been issued by the City. Submission requirements are described at the end of this section. Due dates will be set forth in the schedule.

Consultant shall document all review comments at review meetings. Additional City review comments provided in the form of marked up drawings, specifications and written comments will be returned to the Consultant after every submittal. The Consultant shall incorporate the City's comments into the construction documents after every review. The Consultant shall respond to the comments in writing on the City's template to the City after every review explaining that each item has been incorporated into the documents or will explain why it was not. A comment review meeting with the City might be necessary if the City's comments cannot be incorporated to discuss reason/impact. Consultant team shall not move forward with plan development until the City's review and approval has been issued in writing to Consultant. The Consultant design team shall include a Quality Control (QC) program at each submittal during the Construction Documents phase. The City's Project Manager will request verification of the Consultant's QC review. The objective for the City is for the Consultant to produce fully coordinated construction documents.

- 8.1. <u>75% Submittal</u>: Deliver the 75% Submittal to the City's Project Manager. Review comments will be returned to the Consultant, who shall incorporate the comments into the 95% Submittal. The 75% submittal shall include all updated elements made at DD in addition to the following:
 - 8.1.1. Building sections showing all floor to floor heights or floor to ceiling heights and all associated typical details.

- 8.1.2. Building exterior elevations showing fenestration and exterior building materials including all associated typical details and schedules.
- 8.1.3. Space tabulations of net square footage by room, and total gross square footage.
- 8.1.4. Structural, mechanical, electrical, plumbing, security, fires detection/protection systems, and A/V systems and all associated typical details.
- 8.1.5. Landscaping plan indicating the type, location and extent of plant material and other landscaping features recommended, including security buffering measures meeting City of Portland Crime Prevention Through Environmental Design (CEPTED) guidelines.
- 8.1.6. Riser diagrams (isometric type) for mechanical systems including plumbing.
- 8.1.7. Specifications consisting of red-line edits to the City's standards, marked or typed guide specs and draft specs for items not in the City's standard specs.
- 8.1.8. Cost estimate shall be broken down in accordance with CSI format. Lump sums are not acceptable.
- 8.1.9. Design/Construction Schedule in MS Project confirming that the project is proceeding per the Design Development Schedule.
- 8.1.10. Design calculations.
- 8.1.11. Updated electrical loads on all Panel schedules.
- 8.1.12. Heating and cooling loads for each space.
- 8.1.13. Phone and data requirements, including phone and data room layout per City's Bureau of Technology Services guidelines.
- 8.1.14. The Consultant shall prepare and submit to the City, stamped originals of all on-site and off-site easement plats for review and approval. Note that even though this is a City owned property that easements may be required for storm sewer, sanitary sewer or other utilities.
- 8.1.15. Final finish board including exterior and interior materials based on 35% selections.
- 8.1.16. Hard copy of Consultant Team's Quality Control Review Set (Redline set)
- 8.1.17. Summary of outstanding issues, etc. to the City's Project Manager
 - 8.1.17.1. Electronic copy in PDF format submitted
- 8.1.18. Meetings:
 - 8.1.18.1. Consultant shall conduct progress meetings with the City at a frequency of 1 per month
 - 8.1.18.2. Consultant shall conduct one plan review charrette meeting 2 weeks post plan submittal with the purpose of presenting construction package to the City's staff.
 - 8.1.18.3. Consultant shall conduct one presentation to City staff for the purpose of reviewing proposed equipment for electronic and physical security, energy management, and proposed major building materials selections and finish selections. The City review comments in the form of marked up drawings, specifications and written comments will be returned to the Consultant 14 days

post meeting. The Consultant shall incorporate the City's comments into the 95% construction documents.

- 8.2. <u>95% Submittal</u>: Deliver the 95% Submittal to the City's Project Manager. City review comments will be returned to the Consultant, who shall incorporate the comments into the Permitting Documents. The 95% submittal shall include:
 - 8.2.1. Construction drawings complete
 - 8.2.2. Specifications complete, including list of submittals, list of operation and maintenance manuals and spare parts.
 - 8.2.3. Cost estimates based on quantity take-off and unit material and labor prices. The estimate shall be complete in every respect including overhead, profit, mobilization and demobilization costs, and quotations to support major cost items. Design contingencies shall not be used at this stage.
 - 8.2.4. Design calculations for all structural, mechanical, electrical, plumbing, and civil systems; include manufacturers' model numbers, performance curves, and other design descriptions as appropriate.
 - 8.2.5. Separate listings that identify long lead time items and items, which, because of their uniqueness, criticality, or lack of tolerance in manufacture or installation, require particular scrutiny during construction; and proprietary items. Note: proprietary items shall not be used without express prior approval by the City.
 - 8.2.6. Consultant shall conduct a presentation to City staff for the purpose of reviewing proposed equipment for electronic and physical security, energy management, and proposed major building materials selections and finish selections.
 - 8.2.7. Meetings:
 - 8.2.7.1. Consultant shall conduct progress meetings with the City at a frequency of 1 per month
 - 8.2.7.2. Consultant shall conduct one plan review charrette meeting 2 weeks post plan submittal with the purpose of presenting Construction package to the City's staff.
 - 8.2.7.3. Consultant shall conduct one presentation to City staff for the purpose of reviewing proposed equipment for electronic and physical security, energy management, and proposed major building materials selections and finish selections. The City's review comments in the form of marked up drawings, specifications and written comments will be returned to the Consultant 14 days post meeting. The Consultant shall incorporate the City's comments into the 100% construction documents.
- 8.3. <u>100% Submittal Construction (permitting) Documents:</u> Submit the 100% drawings and specifications to the Project Manager for review. Provide all information, permit applications, resubmittals, corrections and additions necessary to obtain required site development/building permits, including trips to BDS to mark up or attach revisions to the permit review sets as necessary. City Project Manager will be the designated applicant and prime point of contact, meaning all communications, check sheets, responses, negotiations, and appeals will flow

through the City's Project Manager. The City's Project Manager will give direction on revisions. The Permitting 100% submittal shall include:

- 8.3.1. Complete, stamped construction drawings to include Communication drawings, plus CAD files.
- 8.3.2. Complete signed/stamped construction specifications.
- 8.3.3. Cost estimate and design calculations revised according to the 95% submittal review comments.
- 8.3.4. Updated electrical load information.
- 8.3.5. Updated heating and cooling requirements
- 8.4. With the approval of the City's Project Manager, submit all required construction documents to Bureau of Development Services for permit review. The Consultant is to provide all required sets of signed/sealed documents for permitting, where each sheet of drawings has a seal.
- 8.5. The Consultant is responsible for addressing all permit Checksheet comments that are generated by Bureau of Development Services. Consultant shall respond to each Checksheet within 7 days of issuance by permitting department and make any necessary revisions to the documents. If additional time is necessary to address significant issues, Consultant shall notify the City and provide a timeframe for Checksheet response within 7 days of issuance by permitting department.
- 8.6. Deliverables
 - 8.6.1. 75% CD
 - 8.6.1.1. Review Comments response sheet from DD review
 - 8.6.1.2. Full size plans 22"x34" 2 copies
 - 8.6.1.3. Half size plans 11"x17" 5 copies
 - 8.6.1.4. Electronic pdf format
 - 8.6.1.5. Specifications
 - 8.6.1.5.1. Redline edits to City Standards pdf format
 - 8.6.1.5.2. Draft specifications for non-Parks Standards 1 hard copy; electronic pdf format
 - 8.6.1.6. Cost estimate updated from DD pdf format
 - 8.6.1.7. Schedule updated from DD 1 hard copy; electronic MS Project format
 - 8.6.1.8. Design calculations pdf format
 - 8.6.1.9. Heating, Electrical, and AV schedules pdf format
 - 8.6.1.10. Easement plats pdf format
 - 8.6.1.11. Quality Control Review Redline set hard copy full size 22"x34"
 - 8.6.1.12. Life-Cycle Cost Analysis updated pdf format
 - 8.6.1.13. LEED Energy Modeling Report updated 2 hard copies; electronic pdf format

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- 8.6.1.14. LEED Scorecard updated electronic original format or pdf
- 8.6.1.15. Utility Company Communications Summary pdf format
- 8.6.1.16. Outstanding Issue Summary pdf format
- 8.6.1.17. FFE final finish boards original format; electronic pdf format
- 8.6.1.18. Meeting minutes pdf format
- 8.6.1.19. Monthly project status reports pdf format

8.6.2. 95% CD

- 8.6.2.1. Review Comments response sheet from 75% review
- 8.6.2.2. Full size plans 22"x34" 2 copies
- 8.6.2.3. Half size plans 11"x17" 10 copies
- 8.6.2.4. Electronic pdf format
- 8.6.2.5. Specifications, completed 2 hard copies; MS Word and pdf formats
- 8.6.2.6. Cost estimate updated from 75% pdf format
- 8.6.2.7. Schedule updated from 75% 1 hard copy; electronic MS Project format
- 8.6.2.8. Design calculations complete and stamped pdf format
- 8.6.2.9. Quality Control Review Redline set hard copy full size 22"x34"
- 8.6.2.10. LEED Scorecard updated electronic original format or pdf
- 8.6.2.11. Materials lead-time list pdf format
- 8.6.2.12. FFE final finish boards original format; electronic pdf format
- 8.6.2.13. Meeting minutes pdf format
- 8.6.2.14. Monthly project status reports pdf format

8.6.3. 100% PERMITTING DOCUMENTS

- 8.6.3.1. Permit Application documents as required by City of Portland permitting Bureau and as described under Section B, Permitting Task
- 8.6.3.2. Review Comments response sheet from 95% review pdf format
- 8.6.3.3. Stamped Calculations 2 bound hard copies; electronic pdf format
- 8.6.3.4. Construction drawing, stamped
 - 8.6.3.4.1. Full size plans 22"x34" 5 bound copies
 - 8.6.3.4.2. Half size plans 11"x17" 3 copies
- 8.6.3.5. Electronic pdf format
- 8.6.3.6. Specifications, stamped 3 bound hard copies; electronic pdf format
- 8.6.3.7. Heating and Electrical load information, final pdf format
- 8.6.3.8. Cost estimate, final pdf format

- 8.6.3.9. Checksheet response forms pdf format
- 8.6.3.10. Meeting minutes pdf format
- 8.6.3.11. Monthly project status reports pdf format

9. CONSTRUCTION BIDDING PHASE:

Upon authorization by City Project Manager, the Consultant will proceed with preparation of Bid Set. The Consultant will be required to coordinate with the Project Manager to develop the Bid package and identify documents in a manner that allows for control and tracking of the plans during the bid phase. Services shall include:

9.1. Bid Set Preparation

Bid Sets will contain all the drawing and specification revisions to date, as well as all permit revisions. Supply program and quantity take offs as needed to the City's Project Manager for preparation of bid form, unit price schedule, Supplemental General Conditions, contractor prequalification requirements, and other contract requirements for the bid documents.

9.2. Bid Set Services

Provide services during bid period, including attendance at a pre-bid meeting, preparation of all addenda at the City's direction including review of material/product substitution requests and document clarifications. Prepare recommendations memo regarding bid results and proposed value engineering changes, if necessary to bring the bids within budget. Update drawings electronically with all addenda information, and provide a Construction Set of drawings and specifications with all addenda items incorporated. Services shall include:

- 9.2.1. Provide written answers to questions received from bidders through the City. Responses may include revisions to plans, specifications, or project clarifications.
- 9.2.2. Attend a Pre-Bid Conference. Present a brief overview of the project and prepare written response to questions from bidders.
- 9.2.3. The Consultant is to review requests for substitutions and submit recommendation(s) to the City for approval.
- 9.2.4. If all bids are in excess of twenty percent (20%) of the approved Estimated Construction Cost, the Consultant will be required to make City directed value- engineering changes that alter the scope of work to bring bids within the project budget at no additional cost to the City of Portland. The Consultant shall participate with the City in such re-bidding, renegotiating, and design revisions, at no additional expense to the City, as may be necessary to obtain price(s) within the approved Cost Estimate or price(s) acceptable to the City. The City will assist in the design revision decisions. The City must approve all redesign prior to Consultant implementing the changes.

9.3. Deliverables

9.3.1. Bid plan set

9.3.1.1. Full size plans 22"x34" - 1 bound copy

9.3.1.2. Half size plans 11"x17" – 3 copies

9.3.1.3. Electronic pdf format

9.3.2. Bid Set preparation documents – prepare as necessary per Task under Section B and including:

- 9.3.2.1. Quantity take offs
- 9.3.2.2. Unit price schedule
- 9.3.2.3. Supplemental General Conditions
- 9.3.2.4. Contractor pre-qualification requirements
- 9.3.2.5. Written responses to Pre-Bid Conference questions
- 9.3.2.6. VE documents as necessary
- 9.3.2.7. Bid Recommendations Memo

10. CONSTRUCTION ADMINISTRATION PHASE:

Upon authorization by the City's Project Manager, Consultant will proceed with Construction Administration support services to include the following:

Provide construction administration services that will include attendance at construction meetings, project meeting and site visits during construction, site observation visits, review and approval of shop drawings, submittals (including completeness review), samples and mockups, Requests for Information (RFI), communication with the contractor through the City's Construction Manager or Project Manager and provide clarification to construction documents as necessary. Track all drawing and specification changes throughout the construction process in the electronic files for ease of compiling Record Drawings during Close-out. Services shall include:

- 10.1. Pre-Construction Meeting: Attend and co-lead pre-construction meeting with the City's representatives and Construction Contractor. Prepare and submit project submittal log on City spreadsheet.
- 10.2. Progress Meetings: The City's Construction Manager will conduct the Construction Progress Meetings to be held every week. The Consultant shall be responsible for recording minutes from progress meetings that address all concerns of the City and the Construction Contractor. Meeting minutes shall be recorded using City template and shall be distributed by the Consultant to the City within (2) working days after each meeting.
- 10.3. Site Visits: Periodic visits to the construction site by the Consultant shall occur not less than four times per month, timed to coincide with the weekly construction progress meeting with the Construction Contractor. Each engineering discipline shall make periodic visits not less than once monthly, during the course of work applicable to its discipline. During critical work phases, each of the disciplines may be required to make additional visits. On the basis of such on-site observations, the Consultant and any and all Subconsultants shall take the appropriate steps to guard the City against defects and deficiencies in the work of the Construction Contractor. If the Consultant observes any work that does not conform to the Contract Documents, the Consultant shall immediately make an oral and written report of all such observations to the City. The Consultant and any, and all consultants shall not be required to make exhaustive or full- time on-site inspection to check the quality or quantity of the work but shall make as many observations as may be reasonably required to fulfill their obligations to the City. The Consultant shall submit site visit reports electronically no less than four times a month summarizing the construction progress, observations, deficiencies or other issues that may require further discussion. A field report shall be issued each time a member of the Consultant team visits the site. The Consultant shall render written field reports including photos relating to the periodic visits and observations of the project required by the above paragraphs within three (3) working days to the City and the Construction Contractor.

The Consultant shall verify that the Construction Contractor is maintaining the Construction Record Drawing set.

The Consultant shall verify that the Construction Contractor is maintaining all LEED template information for LEED credit.

- 10.4. Changes, CO/PCOs:
 - 10.4.1. Change Orders: The Consultant shall review Change Order documentation.
 - 10.4.2. The Consultant shall review all Construction Contractor requests for Change Orders and make recommendations to the City. The Consultant shall periodically meet to review change orders to determine the nature of the change orders and the proper disposition thereof.
 - 10.4.3. The Consultant will not issue revised construction documents without prior approval of the City's Construction Project Manager, i.e. substitutions, drawing changes, and letters of correction.
- 10.5. RFIs/ASI's/PCOs: The Consultant shall respond to all Construction Contractor Requests-For-Information (RFI), within five (5) working days unless otherwise authorized by the City's Project Manager and prepare subsequent Project Modification (PM) drawings as required. The Consultant shall transmit all RFI responses and PMs to the City's Project Manager for review and transmitting to the Construction Contractor.
- 10.6. Submittals: The Consultant shall review and recommend approval or disapproval of all Construction Contractor submittals including catalog cuts, shop drawings, material samples, manufacturer's certifications, and the contractor's construction bid cost breakdown. Copies of catalog cuts, shop drawings, material samples, and manufacturer's certifications shall be marked-up, stamped, and returned to the Construction Contractor. City staff shall review and approve any requests for substitutions or revisions to specifications or materials.
 - 10.6.1. Submittal reviews shall be completed and returned to the Construction Contractor within seven (7) working days after receipt. If Submittal requires extended review period, Consultant will notify the City and Contractor within three (3) working days after receipt.
 - 10.6.2. Each submittal copy shall be reviewed and signed by the Consultant and shall include a statement regarding the submitted item's compliance with the drawings and specifications:
 - 10.6.2.1. Submittal complies: Stamp "NO EXCEPTIONS TAKEN".
 - 10.6.2.2. Submittal complies, but with clarification or minor change (no re-submittal required): Stamp "APPROVED AS NOTED" and note clarification or change that is required for compliance.
 - 10.6.2.3. Submittal does not comply (requires re-submittal and review): Stamp "REVISE AND RESUBMIT" and note reason for disapproval.
 - 10.6.2.4. Submittal does not comply and is rejected: Stamp "REJECTED" and note reason for rejection.
- 10.7. Certificate of Payment: Based upon observations at the site and upon the Construction Contractor's Applications for Payment, the Consultant shall determine the amount owed to the Construction Contractor(s), shall consult with the City's Project Manager in the determination of

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the amount due the Construction Contractor and the Consultant shall sign the Certificate of Payment prior to the time it is transmitted to the City's Project Manager for final approval for payment. All review and approval of the draft Certificate of Payment will be conducted electronically. The Consultant's signing of a Certificate of Payment shall constitute a representation by the Consultant to the City that the Work has progressed to the point indicated and that to the best of the Consultant's knowledge, information and belief, the quality of the work appears to be in accordance with the Contract Documents (this is subject to an evaluation of the work for conformance with the Contract Documents upon Substantial Completion; the results of any subsequent tests required by the Contract Documents; minor deviations from the Contract Documents correctable prior to completion; and to any specific qualifications stated in the Certificate for Payment.) and shall within two (2) days after receipt of Application from Construction Contractor respond to Certificate of Payment. In signing the Certificate of Payment, the Consultant certifies that the Construction Contractor is entitled to payment in the amount certified. However, if it should later be found that the Construction Contractor has failed to comply with its contract with the City in any way or detail, such failures and subsequent compliance shall be the sole responsibility of said Construction Contractor provided that Consultant has complied with the terms of this contract. By signing the Certificate for Payment to the City, the Consultant shall not be deemed to represent that it has made any examination to ascertain how and for what purpose the Construction Contractor has used the monies paid on account of the Construction Contract Sum.

10.8. Punch List: When the Construction Contractor states that the work, or portions of the work, are substantially complete, the Consultant and any and all Subconsultants shall inspect that work, prepare and submit to the City's Project Manager typed punch lists of the work of the Construction Contractor(s) which is not in conformance with the Contract Documents. The City shall transmit such punch lists to the Construction Contractor(s). The Consultant will inspect and prepare a punch list on portions of the work. The Consultant and any and all Subconsultants shall conduct up to two (2) comprehensive substantial completion inspections at the request of the City.

The Consultant shall verify that the Construction Contractor has completed LEED template information for all construction credits the Construction Contractor is responsible for.

- 10.9. The Consultant and any and all Subconsultants shall observe and review test data of the original operation of any equipment or system such as initial start-up testing, adjusting and balancing to verify that all equipment and systems are properly installed and functioning in accordance with the design and specifications.
- 10.10. Construction phase coordination will be required by the Consultant with City vendors including a Third-Party Commissioning Agent and others. Third-Party commission will be secured by the City.
- 10.11. Upon correction of the deficiency reports (punch lists), issuance of Certificate of Occupancy, and acceptance of all other closeout submittals and certificates of the Construction Contractor, the City's Project Manager and the Consultant shall approve the Application for Final Payment.
- 10.12. Should errors, omissions or conflicts in the drawings, specifications or other Contract Documents by the Consultant be discovered, the Consultant shall prepare and submit to the City, within five (5) working days unless authorized by the City, such amendments or supplementary documents and provide consultation as may be required.

Exhibit a – Statement of Work

- 10.13. If any exceptions arise related to the design or specified materials the Consultant is responsible for correcting the situation at no additional expense to the City.
- 10.14. The Consultant is required to provide as-built plan documents as required by City Standards.
- 10.15. The Consultant is required to provide the City all equipment and system information in an electronic format approved by the City for direct import (by the City) into the Work Order and/or Asset Management System.
- 10.16. The Consultant is required to provide the City an Asset Management Plan in an electronic format approved by the City to include:
 - 10.16.1. Weekly, monthly, quarterly, annual, and on-condition maintenance tasks with estimate labor requirements for each;
 - 10.16.2. Lifecycle tasks with expected timeframes and expected costs, including HVAC equipment replacements, finishing replacements, etc. The Consultant shall not rely solely on manufacturer recommendations and shall conduct an independent reliability analysis to optimize the lifecycle and ongoing maintenance regime.
- 10.17. Deliverables
 - 10.17.1. Delivery of construction administration documents throughout the project as required under Park 1, Section B.3, including but not limited to:
 - 10.17.1.1. Submittal log electric pdf format (City spreadsheet)
 - 10.17.1.2. Meeting minutes, 2 days after each meeting MS Word format
 - 10.17.1.3. Site visit and field inspection reports electronic pdf format
 - 10.17.1.4. RFI/ASI/PCO/CO response forms electronic pdf format
 - 10.17.1.5. Submittal review responses electronic pdf format
 - 10.17.1.6. Submittal log, updated weekly electronic MS Excel and pdf formats
 - 10.17.1.7. Revisions to drawings and specifications as necessary original format
 - 10.17.1.8. Substantial completion punch list, including items keyed to a key map and photos illustrating deficiencies electronic MS Excel and pdf formats
 - 10.17.1.9. Final completion punch list, including items keyed to a key map and photos illustrating deficiencies electronic MS Excel and pdf formats
 - 10.17.1.10. As-Built documents, including drawings, specifications
 - 10.17.1.11. CAD drawings original electronic format
 - 10.17.1.12. Specifications MS Word and electronic pdf formats
 - 10.17.1.13. Additional deliverables required to accomplish the tasks identified in the scope of work and task requirements sections.

11. FURNISHINGS CONTRACT ADMINISTRATION:

Provide furniture and equipment design and contract administration services to fully outfit the project based on the City's available FFE budget. Furniture and non-fixed equipment is assumed to be FFE. Fixed equipment, building systems related equipment and audiovisual equipment are planned to be part of the Construction Contractor's scope of work and shall be included within the Construction Documents.

Furnishings budget is approximately \$100,000; however, this budget will be further refined as requirements are identified during design.

- 11.1. Furnishings Design Phase:
 - 11.1.1. Meetings with City staff as required for full selection of new furnishings and equipment including but not limited to the following:
 - 11.1.1.1. Furniture Concept Presentations Provide options for review and to narrow down selections for each piece and area;
 - 11.1.1.2. Selections Meetings Final selections on items;
 - 11.1.1.3. Finishes/Fabric Selections Meetings; and
 - 11.1.1.4. Public Area Furnishings Meetings.
 - 11.1.2. Provide one (1) draft and one (1) final specifications manual, including cut-sheets, color and finish selections, full specifications and details necessary to obtain competitive bids for the furnishings.
 - 11.1.3. Provide final furnishings plan with all pieces tagged by individual furniture type and referenced to specifications manual. Tag each piece uniquely including any differences in finishes and fabrics. For example, a C1 chair may be the same furniture piece as a C2 chair, but if they have different fabrics/finishes, they should be tagged uniquely.
 - 11.1.4. Provide final furnishings detail drawings for any custom furnishings required.
 - 11.1.5. The City shall respond to furnishings submittal within 3-weeks. Consultant shall incorporate the City's input in furnishings plan or indicate reasons why not feasible.
- 11.2. Procurement of Furnishings:
 - 11.2.1. Assist the City in the evaluation of the bids received. Provide recommendations to the City for the award of contracts for the furnishings.
- 11.3. Contract Administration/Installation Coordination (for all FFE) shall include:
 - 11.3.1. Preparation of Bill-of-Materials.
 - 11.3.2. Coordination with the City's Project Manager to schedule all vendors for installation. Detailed coordination, planning and scheduling will be required.
 - 11.3.3. Reports to the City's Project Manager on the furniture status and projected installation dates.
 - 11.3.4. Field coordination for electrical connections to systems furniture.
 - 11.3.5. On-site receipt and inspection of furniture and equipment.
 - 11.3.6. Reports to the City's Project Manager and the vendors on any follow-up on corrections of errors and/or damaged goods. Coordination of schedule for any repairs or replacements.
 - 11.3.7. Statement of completion for each vendor/purchase order when all items are complete, received and installation with no open issues so that the City's Project Manager can approve final payment on purchase orders.
- 11.4. Deliverables

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Exhibit a – Statement of Work

- 11.4.1. Furniture concept presentation materials material samples and electronic pdf format
- 11.4.2. Specifications meeting minutes electronic pdf format
- 11.4.3. Specifications Manual

11.4.3.1. Draft – 4 hard copies and electronic pdf format

11.4.3.2. Final – 4 hard copies and electronic pdf format

11.4.4. Final furnishings plan

11.4.4.1. Draft – 4 hard copies and electronic pdf format

- 11.4.4.2. Final 4 hard copies and electronic pdf format
- 11.4.5. Final furnishings drawings
 - 11.4.5.1. Draft 4 hard copies and electronic pdf format
 - 11.4.5.2. Final 4 hard copies and electronic pdf format
- 11.4.6. Furnishings procurement recommendations
 - 11.4.6.1. Draft electronic pdf format
 - 11.4.6.2. Final electronic pdf format
- 11.4.7. Contract administration
 - 11.4.7.1. Bill of materials original format
 - 11.4.7.2. Furniture procurement and installation status; monthly, pdf format
 - 11.4.7.3. Furniture installation follow-up reports; pdf format
 - 11.4.7.4. Statement of completion pdf format
- 12. BUILDING COMMISSIONING:

The City shall provide for the Building Commissioning and Testing Services under separate contracts. The Consultant shall be available to coordinate commissioning and testing activities to include: provide project specifications, video documentation and oversight during all start-up and training to ensure that all major building systems, including, but not limited to the following items, are completed to the full satisfaction of the City by the Construction Contractor:

- 12.1. Provide commissioning specifications, asset handover and transition to operations services, including asset management planning information and formatted data.
- 12.2. Equipment start-up/demonstration by factory-authorized persons
- 12.3. Duct pressure testing
- 12.4. Demonstration of complete security systems
- 12.5. Air balancing
- 12.6. Piping systems pressure testing
- 12.7. Tests and demonstrations required by Local Code Authorities
- 12.8. Submittal of all required certificates, warranties, and test reports
- 12.9. Submittal of Operations and Maintenance Manuals

Exhibit a - Statement of Work

- 12.10. Demonstration of Audio-Visual systems
- 12.11. Fire alarm / suppression systems
- 12.12. Mechanical systems components and controls demonstration
- 12.13. Emergency Power Systems
- 12.14. Specified training for operation of building systems
- 12.15. Attend a minimum of five (5) commissioning meetings as necessary during construction
- 12.16. Consultant shall to be available to coordinate with the City's Third-Party Commissioning agent on the required Commissioning documentation.
- 12.17. Deliverables
 - 12.17.1. Project commissioning specifications
 - 12.17.1.1. Draft electronic pdf format
 - 12.17.1.2. Final electronic pdf format
 - 12.17.2. Video documentation
 - 12.17.2.1. Original format
 - 12.17.3. Meeting minutes
 - 12.17.3.1. Draft electronic pdf format
 - 12.17.3.2. Final electronic pdf format

13. POST-CONSTRUCTION PHASE:

- 13.1. Prepare record "as-built" drawings on AutoCAD and Revit files based on marked-up prints, drawings and other data furnished by the Construction Contractor. Submit final record drawings within 30 calendar days after receipt of marked-up drawings from the Construction Contractor. All final CAD files shall be in accordance with City Standards and include floorplans. The final "as-built" drawings shall show the actual construction only, except where the originals contain portions of the drawings marked "N.I.C." (not in contract). Where a drawing is modified to show "as-built" conditions, the notation "RECORD DRAWING" shall be entered on the top most available line in the revision block.
- 13.2. City is using this project to pilot Building Information Modeling. The Consultant shall also recommend and provide City all building information in Revit or other approved format.
- 13.3. The Consultant shall prepare a set of reproducible record drawings which show significant changes in the work made during the construction process, based on marked-up contract drawings, prints, and other data furnished by the Construction Contractor(s) and the applicable Addenda, Clarifications, and Change Orders which occurred during the project.
- 13.4. The Consultant shall attend the original operation of any equipment or system such as initial start- up, testing, adjusting and balancing.
- 13.5. The Consultant and any and all Subconsultants shall observe and review test data of the original operation of any equipment or system such as initial start-up testing, adjusting and balancing to verify that all equipment and systems are properly installed and functioning in accordance with the design and specifications.

Exhibit a – Statement of Work

- 13.6. The Consultant and any and all Subconsultants shall conduct up to two (2) comprehensive Final Completion inspections for the project at the request of the City.
- 13.7. Upon correction of the deficiency reports (punch lists), and acceptance of all other closeout submittals and certificates of the Construction Contractor, the City and the Consultant shall approve the Application for Final Payment.
- 13.8. Deliverables
 - 13.8.1. As-build CAD drawings
 - 13.8.1.1. Draft electronic CAD and Revit
 - 13.8.1.2. Final electronic CAD, Revit, and pdf formats
 - 13.8.2. Start-up, testing, adjusting, balancing and test data review summaries
 - 13.8.2.1. Draft
 - 13.8.2.2. Final
 - 13.8.3. Final completion inspection (punchlist) reports
 - 13.8.3.1. Draft electronic pdf format
 - 13.8.3.2. Final electronic pdf format

14. OWNER TASK DESCRIPTION

The City has assigned a Project Manager to oversee the Consultant's work and provide support as needed. On a day-to-day basis, the progress of the work will be managed by the City's Project Manager. City staff will review and provide comments on the required documents, plans, specifications and cost estimates. In particular, the following City staff reviews will be conducted for the schematic design, design development and for the construction documents. Staff reviews shall be allowed 3-weeks for review.

- City staff: Schematic Design documents
- City staff: Design Development documents; 35%
- City staff: Construction Development documents; 75%, 95%, 100%
- BDS, PBOT, Tri-Met, Special Inspection and Other: Permit documents.
- City staff: as-built documents.

The City expects to involve staff from the City of Portland **Bureau of Planning and Sustainability (BPS)** to assist with identifying and implementing green design opportunities throughout the project. However, the City's Project Manager remains the principal contact and decision-making authority for the City on this project.

Other specific duties the City will perform include:

- 14.1. <u>Phase 1</u>: Design Development, Permitting and Contract Documents
 - 14.1.1. Provide copies of materials relevant to the project to the Consultant such as:
 - 14.1.1.1. All available studies and materials investigations data.
 - 14.1.1.2. Plans and previous surveys, if any.
 - 14.1.1.3. Technical reports.

Exhibit a – Statement of Work

- 14.1.1.4. Schematics.
- 14.1.1.5. Proposed schedules.
- 14.1.1.6. Public involvement plan.
- 14.1.1.7. CAD files.
- 14.1.1.8. City General Conditions and Specification Standards.
- 14.1.1.9. City CAD standards.
- 14.1.1.10. Some City Specifications Sections.
- 14.1.1.11. City As-Built Standards.

Note: City staff will be available for a meeting and will provide copies of the available information.

- 14.1.2. Review of the Consultant's work plan.
 - 14.1.2.1. The City will use the work plan, in part, to manage the contract with the Consultant.
- 14.1.3. Provide a copy of the existing space requirements for temporary office spaces and storage spaces if they will be necessary.
- 14.1.4. Provide input and assist the Consultant in the permit process for the Project including coordination assistance with government entities and utilities.
- 14.1.5. Coordinate internal staff reviews and provide input to the Consultant and on the design and construction documents.
- 14.1.6. Develop and implement a Public Involvement Plan and public outreach program working with Mt Scott Management.
- 14.1.7. Review with the Consultant cost control measures and Project status at least once per month.

14.2. PHASE 2: Construction Oversight including Quality Control and Assurance

- 14.2.1. Oversee and manage contract with the Consultant and Construction Contractor including monthly progress payments.
- 14.2.2. Provide overall construction management.
- 14.2.3. Coordinate and manage moving supplies and equipment from storage areas into temporary storage workspaces if necessary.
- 14.2.4. Coordinate and manage the move of any staff as necessary, including phones and computers.
- 14.2.5. Provide regulatory special inspectors as required by the permits.

15. DELIVERABLES AND SCHEDULE

Deliverables shall be considered those tangible resulting work products that are to be delivered to the City such as reports, draft documents, data, interim findings, drawings, schematics, training, meeting presentations, final drawings, and reports. Unless otherwise specified by the City, the Consultant shall

prioritize submitting applicable deliverables electronically, and any paper-based deliverables shall be printed double-sided and in bindings or report covers that are fully recyclable, preferably using materials containing post-consumer waste (PCW) recycled content.

All deliverables and resulting work products from this Contract will become the property of the City of Portland. As such, the Consultant and any Subconsultants grant the City the right to copy and distribute (in any and all media and formats) project deliverables for regulatory, project certification/recognition, program development, public education, and/or for any purposes at the sole discretion of the City of Portland.

16. CONSULTANT KEY PERSONNEL

The Consultant shall assign the following Key Personnel to do the work in the capacities designated and agrees not to substitute these personnel while working on the Contract without the express approval of the City, which approval shall not unreasonably be withheld:

NAME	ROLE ON PROJECT
Troy Ainsworth	Principal
Laura Roark, RA	Project Manager
Richard Grace, AIA	Design Lead
Juliette Grummon-Beale, RA	Architect and Sustainability Lead
Christine Rumi, RA	QA/QC Manager

17. SUBCONSULTANTS

The Consultant shall assign the following Subconsultants to perform work in the capacities designated:

NAME	ROLE ON PROJECT	COBID	SUBCONTRACT
		CERTIFICATION	AMOUNT
ABHT Structural	Structural Engineering	MBE	\$400,350.00
Vega Civil Engineering	Civil Engineering	DBE/WBE	\$136,625.00
Angelo Planning	Planning	DBE/WBE	\$25,536.00
Samata Consulting	Electrical Engineering	WBE	\$108,100.00
Mayer/Reed, Inc.	Landscape Architecture	WBE	\$142,417.50
m.thrailkill.architecture	Specification Writer	ESB	\$50,210.00
Portland Tree Consultancy	Arborist	ESB	\$4,600.00
PAE Mechanical	Mechanical Engineering		\$372,275.00
PAT Tech	Information Technology		\$66,765.00
Morrison Hershfield Cons.	Forensic Architecture		\$80,230.00
Rider Levett Bucknall, Ltd.	Cost Estimating		\$64,500.00
Acoustic Design Studio	Acoustics		\$10,660.00
Brightworks Sustainability	LEED		\$112,690.00
Praxis	Asset Management		\$31,925.00
PBS Geotech	Geotechnical Engineering		\$53,690.00
KPFF	Survey		\$42,560.00

Total subcontracting to COBID certified firms on this contract is estimated at \$867,838.50 or 24.34% of the Contract Amount.

The City will enforce all social equity Contracting and subcontracting commitments of COBID certified firms indicated in the table above. Consultant shall not add, eliminate, or replace any Subconsultant assignments without the prior written consent of the Chief Procurement Officer. Failure to use the identified COBID certified Subconsultants without prior written consent is a material breach of contract. Any changes must be reported and submitted to the PTE Contract Compliance Specialist. All changes to this Contract, including changes to the Subconsultant participation, must be made by written amendment and approved by the Chief Procurement Officer to be valid.

For Contracts valued \$50,000 or more, the Consultant shall submit Subconsultant payment and utilization information electronically in the Contract Compliance Reporting System, reporting ALL Subconsultants employed in the performance of this agreement. More information on this process may be viewed on the City Procurement website at: <u>https://www.portlandoregon.gov/brfs/75932</u>.

Exhibit b - Compensation

The maximum that the Consultant will be paid for the work on this Contract is \$3,566,328.50 (hereafter the "not to exceed" amount).

The "not to exceed" amount includes all payments to be made pursuant to this Contract, including reimbursable expenses, and Contract Mitigation if any. Contract Mitigation can be used only with prior written approval of the City prior to any effort being accomplished on added tasks. Nothing in this Contract requires the City to pay for work that does not meet the Standard of Care or other requirements of the Contract. The actual amount to be paid to the Consultant may be less than that amount.

The Consultant shall be paid based on its hourly rates, plus any authorized expenses, in accordance with the tasks listed below. If a task is completed and accepted by the City, and the amount billed by the Consultant is less than the estimated budget for the task, the remaining amount may be used on the other tasks as authorized in writing by the Project Manager. In no event shall the Consultant bill for an amount greater than what is shown for each task.

Task/Phase	Description	Amount
1	Project Initiation	\$28,095.00
2	Pre-Design / Assessment	\$203,350.00
3	Pre-Design / Framework	\$144,910.00
4	Schematic Design	\$517,265.00
5	Design Development	\$682,583.50
6	Construction Documents	\$874,857.50
7	Permitting and Bidding	\$130,785.00
8	Construction Administration	\$649,460.00
9	Commissioning and LEED	\$23,595.00
10	Project Closeout	\$94,715.00
11	Expenses	\$70,942.50
12	As-Built Services – Base Revit Model	\$10,770.00
13	Value Engineering Contingency	\$35,000.00
14	Owner's Contingency	\$100,000.00
	Total Not to Exceed:	\$3,566,358.50

The Consultant is entitled to receive progress payments for its work pursuant to the Contract as provided in more detail below. The City will pay Consultant based on invoices for acceptable work performed and approved until the "not to exceed" amount is reached. Thereafter, Consultant must complete work based on the Contract without additional compensation unless there is a change to the scope of work.

Any estimate of the hours necessary to perform the work is not binding on the City. The Consultant remains responsible if the estimate proves to be incorrect. Exceeding the number of estimated hours to complete the work does not impose any liability on the City for additional payment.

If the work is completed before the "not to exceed" amount is reached, the Consultant's compensation will be based on the Consultant's bills previously submitted for acceptable work performed and approved.

1. Payment Terms: Net 30 Days

The City shall pay the Consultant as follows upon the submission of invoices approved.

2. Standard Reimbursable Costs

The following costs will be reimbursed without cost-increase:

- 2.1. If pre-approved by the City, allowable costs of travel shall be determined in accordance with the General Services Administration (GSA) per diem rates in effect on the date of this Contract. Consultant's time spent traveling to the Portland area, however, will not be reimbursed. All costs incurred for local travel within the Portland metropolitan area, and a 100-mile radius, including but not limited to, vehicle mileage and parking fees are considered as included in the overhead rate, and shall not be reimbursed separately.
- 2.2. Personal expenditures or expenditures not related to the Contract are not eligible for reimbursement.
- 3. Hourly Rates

Exhibit b – Compensation

3.1. The Consultant shall be compensated in accordance with the hourly rates set forth in attached Exhibit c, Hourly Billing Rates. In no way shall the cost of hours billed by the Consultant exceed the total Contract amount throughout the term of this Contract.

4. Subconsultant Costs

Compensation for Subconsultants shall be subject to the same billing restrictions and requirements as those of the Consultant. Consultant may bill Subconsultant services at cost and shall not be subject to any cost increase. Other direct expenses, as stated under Standard Reimbursable Costs, shall be billed at cost without mark-up. Allowable Subconsultant services can only be marked-up once. For example, the Consultant is not allowed to mark-up on a second tier Subconsultant's services if it has already been marked-up by the Consultant's Subconsultant. Mark-up is not allowed when using intergovernmental resources to complete work and will not be accepted.

5. Progress Payments

- 5.1. Compensation to the Consultant shall be based on the following:
 - 5.1.1. Invoices submitted to the City, including the appropriate required information as outlined below and all supporting documentation relating to charges expressed on the invoice.
 - 5.1.2. The invoice shall be submitted to the City Project Manager.
 - 5.1.3. Detailed monthly Project Progress Reports submitted to the City Project Manager by email.
- 5.2. The Consultant is required to follow Generally Accepted Accounting Principles (GAAP). Personal expenditures or expenditures not related to the Project or part of the Contract are not eligible for reimbursement. On or before the 15th of each month, the Consultant shall submit to the City Accounts Payable Department an invoice for work performed by the Consultant during the preceding month.
- 5.3. The Consultant shall enter all the following information on their invoice in order for the City to review and authorize the invoice for payment.
 - 5.3.1. Contract Number, City's Project Title and any other identifying information requested by the City
 - 5.3.2. Invoice date
 - 5.3.3. Date range during which the services are being invoiced for work provided
 - 5.3.4. Invoice number. The last invoice submitted on the Project must be clearly labeled "Final Invoice"
 - 5.3.5. City Project Manager's name
 - 5.3.6. Amount being invoiced for the current invoice
 - 5.3.7. Consultant shall describe all services performed with particularity and by whom it was performed (Consultant's individuals or Subconsultant, labor category, direct labor rate, hours worked during the period) and shall itemize and explain all expenses for which reimbursement is claimed. If reimbursable expenses are authorized, identify by line item categories, 1) Travel Expenses and 2) General Reimbursable Expenses. Note: Invoices for Basic Services under a specific Task shall be for completed Basic Services only and shall indicate the percentage of the total Basic Services for that Task that the amount invoiced represents
 - 5.3.8. The Consultant shall also attach photocopies of claimed reimbursable expenses, as applicable and preapproved authorization document from the City Project Manager
 - 5.3.9. The Consultant shall stamp and approve all Subconsultant invoices and note on Subconsultant invoice what they are approving as "billable" under the Contract
 - 5.3.10. The billing from the Consultant must clearly roll up labor and reimbursable costs for the Consultant and Subconsultants. Any billings for Subconsultants must match the Subconsultant invoices.
- 5.4. To the extent the City disputes any portion of the amount requested in the application for payment, the City shall indicate the undisputed amounts and the amounts that are in dispute. The City shall pay the undisputed amounts and indicate to whom such payments shall be made. The Consultant shall make such payments to itself and to Subconsultants as indicated by the City for such undisputed amounts. The City and Consultant and, if applicable, the Subconsultant shall then work to reach agreement on the disputed amounts.
- 5.5. Prior to initial billing, the Consultant shall develop a billing format for approval by the City. Submission of the draft billing document shall be emailed to the City Project Manager for final review and approval.

6. ACH Payments

It is the City's policy to pay its Consultant invoices via electronic funds transfers through the automated clearing house (ACH) network. To initiate payment of invoices, Consultants shall execute the City's standard ACH Vendor Payment Authorization Agreement and provide required documentation. Upon verification of the data provided, the Payment Authorization Agreement will authorize the City to deposit payments directly into Consultant's accounts with financial institutions. All payments shall be in United States currency.

7. Authorization to Proceed

Irrespective of the effective date of the Contract, the Consultant shall not proceed with any work required under this Contract without a written authorization to proceed from the City. Any work performed or expenses incurred by the Consultant prior to the Consultant's receipt of authorization to proceed shall be entirely at the Consultant's risk.

Exhibit b - Compensation

The maximum that the Consultant will be paid for the work on this Contract is \$3,566,328.50 (hereafter the "not to exceed" amount).

The "not to exceed" amount includes all payments to be made pursuant to this Contract, including reimbursable expenses, and Contract Mitigation if any. Contract Mitigation can be used only with prior written approval of the City prior to any effort being accomplished on added tasks. Nothing in this Contract requires the City to pay for work that does not meet the Standard of Care or other requirements of the Contract. The actual amount to be paid to the Consultant may be less than that amount.

The Consultant shall be paid based on its hourly rates, plus any authorized expenses, in accordance with the tasks listed below. If a task is completed and accepted by the City, and the amount billed by the Consultant is less than the estimated budget for the task, the remaining amount may be used on the other tasks as authorized in writing by the Project Manager. In no event shall the Consultant bill for an amount greater than what is shown for each task.

Task/Phase	Description	Amount
1	Project Initiation	\$28,095.00
2	Pre-Design / Assessment	\$203,350.00
3	Pre-Design / Framework	\$144,910.00
4	Schematic Design	\$517,265.00
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6	Construction Documents	\$874,857.50
7	Permitting and Bidding	\$130,785.00
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9	Commissioning and LEED	\$23,595.00
10	Project Closeout	\$94,715.00
11	Expenses	\$70,942.50
12	As-Built Services – Base Revit Model	\$10,770.00
13	Value Engineering Contingency	\$35,000.00
14	Owner's Contingency	\$100,000.00
	Total Not to Exceed:	\$3,566,358.50

The Consultant is entitled to receive progress payments for its work pursuant to the Contract as provided in more detail below. The City will pay Consultant based on invoices for acceptable work performed and approved until the "not to exceed" amount is reached. Thereafter, Consultant must complete work based on the Contract without additional compensation unless there is a change to the scope of work.

Any estimate of the hours necessary to perform the work is not binding on the City. The Consultant remains responsible if the estimate proves to be incorrect. Exceeding the number of estimated hours to complete the work does not impose any liability on the City for additional payment.

If the work is completed before the "not to exceed" amount is reached, the Consultant's compensation will be based on the Consultant's bills previously submitted for acceptable work performed and approved.

1. Payment Terms: Net 30 Days

The City shall pay the Consultant as follows upon the submission of invoices approved.

2. Standard Reimbursable Costs

The following costs will be reimbursed without cost-increase:

- 2.1. If pre-approved by the City, allowable costs of travel shall be determined in accordance with the General Services Administration (GSA) per diem rates in effect on the date of this Contract. Consultant's time spent traveling to the Portland area, however, will not be reimbursed. All costs incurred for local travel within the Portland metropolitan area, and a 100-mile radius, including but not limited to, vehicle mileage and parking fees are considered as included in the overhead rate, and shall not be reimbursed separately.
- 2.2. Personal expenditures or expenditures not related to the Contract are not eligible for reimbursement.
- 3. Hourly Rates
 - 3.1. The Consultant shall be compensated in accordance with the hourly rates set forth in attached Exhibit C, Hourly Billing Rates. In no way shall the cost of hours billed by the Consultant exceed the total Contract amount throughout the term of this Contract.
- 4. Subconsultant Costs

Compensation for Subconsultants shall be subject to the same billing restrictions and requirements as those of the Consultant. Consultant may bill Subconsultant services at cost and shall not be subject to any cost increase. Other direct expenses, as stated under Standard Reimbursable Costs, shall

be billed at cost without mark-up. Allowable Subconsultant services can only be marked-up once. For example, the Consultant is not allowed to mark-up on a second tier Subconsultant's services if it has already been marked-up by the Consultant's Subconsultant. Mark-up is not allowed when using intergovernmental resources to complete work and will not be accepted.

- 5. Progress Payments
 - 5.1. Compensation to the Consultant shall be based on the following:
 - 5.1.1. Invoices submitted to the City, including the appropriate required information as outlined below and all supporting documentation relating to charges expressed on the invoice.
 - 5.1.2. The invoice shall be submitted to the City Project Manager.
 - 5.1.3. Detailed monthly Project Progress Reports submitted to the City Project Manager by email.
 - 5.2. The Consultant is required to follow Generally Accepted Accounting Principles (GAAP). Personal expenditures or expenditures not related to the Project or part of the Contract are not eligible for reimbursement. On or before the 15th of each month, the Consultant shall submit to the City Accounts Payable Department an invoice for work performed by the Consultant during the preceding month.
 - 5.3. The Consultant shall enter all the following information on their invoice in order for the City to review and authorize the invoice for payment.
 - 5.3.1. Contract Number, City's Project Title and any other identifying information requested by the City
 - 5.3.2. Invoice date
 - 5.3.3. Date range during which the services are being invoiced for work provided
 - 5.3.4. Invoice number. The last invoice submitted on the Project must be clearly labeled "Final Invoice"
 - 5.3.5. City Project Manager's name
 - 5.3.6. Amount being invoiced for the current invoice
 - 5.3.7. Consultant shall describe all services performed with particularity and by whom it was performed (Consultant's individuals or Subconsultant, labor category, direct labor rate, hours worked during the period) and shall itemize and explain all expenses for which reimbursement is claimed. If reimbursable expenses are authorized, identify by line item categories, 1) Travel Expenses and 2) General Reimbursable Expenses. Note: Invoices for Basic Services under a specific Task shall be for completed Basic Services only and shall indicate the percentage of the total Basic Services for that Task that the amount invoiced represents
 - 5.3.8. The Consultant shall also attach photocopies of claimed reimbursable expenses, as applicable and preapproved authorization document from the City Project Manager
 - 5.3.9. The Consultant shall stamp and approve all Subconsultant invoices and note on Subconsultant invoice what they are approving as "billable" under the Contract
 - 5.3.10. The billing from the Consultant must clearly roll up labor and reimbursable costs for the Consultant and Subconsultants. Any billings for Subconsultants must match the Subconsultant invoices.
 - 5.4. To the extent the City disputes any portion of the amount requested in the application for payment, the City shall indicate the undisputed amounts and the amounts that are in dispute. The City shall pay the undisputed amounts and indicate to whom such payments shall be made. The Consultant shall make such payments to itself and to Subconsultants as indicated by the City for such undisputed amounts. The City and Consultant and, if applicable, the Subconsultant shall then work to reach agreement on the disputed amounts.
 - 5.5. Prior to initial billing, the Consultant shall develop a billing format for approval by the City. Submission of the draft billing document shall be emailed to the City Project Manager for final review and approval.
- 6. ACH Payments

It is the City's policy to pay its Consultant invoices via electronic funds transfers through the automated clearing house (ACH) network. To initiate payment of invoices, Consultants shall execute the City's standard ACH Vendor Payment Authorization Agreement and provide required documentation. Upon verification of the data provided, the Payment Authorization Agreement will authorize the City to deposit payments directly into Consultant's accounts with financial institutions. All payments shall be in United States currency.

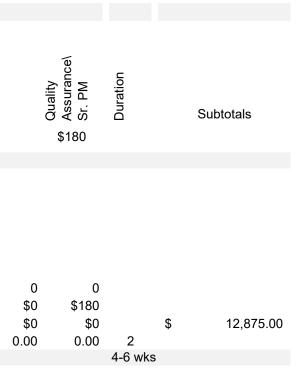
7. Authorization to Proceed

Irrespective of the effective date of the Contract, the Consultant shall not proceed with any work required under this Contract without a written authorization to proceed from the City. Any work performed or expenses incurred by the Consultant prior to the Consultant's receipt of authorization to proceed shall be entirely at the Consultant's risk.

lpdated 4.19.2021																												_		-		-									
		Basic FFA	A/E Team	м	Thrailkill		DUT	-	PAE MEF	в	PAE/Sa	moto	Expande PAE Te	d Services	Vega		Mayer/F	Pood	мн		RLB		ADS		Brightw	orko	Praxis		Suppliment		, .	wner Prov PTC	ided Services	s PBS		Angol	o Planning	a Totala			
	Duration		ecture+Interio				tructural		MEP/Sust				Technolo		Civil		Landscap		Envelope		Estimator		Acoustics		Sustaina		FIM		see SS below			Arbo			ch/Environ			JIOLAIS			
				COE	BID	C	OBID				COBID				COBID		COBID															COB	ID								
ask 1 Project Initiation		\$	12,875.00	0\$	-	- 9	\$ 5,775	5.00	\$ 2,5	510.00	\$	150.00	\$	185.00	\$ 1	,480.00	\$ 1	,775.00	\$	890.00	\$	-	\$	-	\$ 2	,340.00			\$	- \$	-	\$	115.00)\$	-	\$	-	\$	28,095.00	Task 1	Initiation
ask 2 Pre-Design Assessment	~6 wks	\$	56,125.00	0\$	-	- \$	\$ 40,515	5.00	\$ 8,1	100.00	\$ 4	4,470.00	\$ 2	,635.00	\$ 6	,070.00	\$ 3	8,975.00	\$ 9	9,680.00	\$	-	\$	160.00	\$	360.00			\$	- \$	39,260.	00 \$	1,610.00)\$	30,390.00	\$	-	\$	203,350.00	Task 2	PD-A
ask 3 Pre-Design Framework	~6 wks	\$	77,610.00	0\$	-	- \$	\$ 6,240	0.00	\$ 24,3	260.00	\$ 3	3,270.00	\$ 2	,520.00	\$ 1	,955.00	\$ 3	8,995.00	\$ 2	2,540.00	\$	-	\$	-	\$ 10	,720.00	\$ 11,80	00.00	\$	- \$	-	\$	-	\$	-	\$	-	\$	144,910.00	Task 3	PD-F
ask 4 Schematic Design	~3.5 mo	\$	298,280.00	0\$	5,400.	.00 \$	58,290	0.00	\$ 51,	790.00	\$ 11	1,800.00	\$8	,695.00	\$ 12	,080.00	\$ 27	,340.00	\$ 1	1,530.00	\$ 17,	,500.00	\$1,	00.00	\$ 23	,100.00			\$	- \$	-	\$	460.00)\$	-	\$	-	\$	517,265.00	Task 4	SD
ask 5 Design Development	~3.5 mo	\$	334,310.00	0\$	15,620.	.00 \$	72,250	0.00	\$ 81,3	390.00	\$ 25	5,300.00	\$ 15	,335.00	\$ 37	,582.50	\$ 28	8,510.00	\$ 9	9,230.00	\$ 16,	,000.00	\$2,	500.00	\$ 18	,100.00			\$	- \$	-	\$	920.00)\$	-	\$ 1	25,536.00	\$	682,583.50	Task 5	DD
ask 6 Construction Documents	~4.5 mo	\$	400,935.00	0\$	23,430.	.00 \$	5 117,820	0.00	\$ 123,	850.00	\$ 35	5,670.00	\$ 21	,910.00	\$ 49	,092.50	\$ 41	,820.00	\$ 11	1,060.00	\$ 31,	,000.00	\$5,	00.00	\$ 13	,040.00			\$	- \$	-	\$	230.00)\$	-	\$	-	\$	874,857.50	Task 6	CD
ask 7 Permitting and Bidding		\$	75,590.00	0\$	3,300.	.00 \$	5 20,620	0.00	\$ 3,5	560.00	\$ 2	2,700.00	\$	660.00	\$ 9	,045.00	\$ 5	5,560.00	\$	-	\$	-	\$	500.00	\$ 9	,250.00			\$	- \$	-	\$	-	\$	-	\$	-	\$	130,785.00	Task 7	PB
ask 8 Construction Administration	~18 mo	\$	393,080.00	0\$	2,460.	.00 \$	i 69,030	0.00	\$ 59,0	675.00	\$ 18	3,090.00	\$ 11	,655.00	\$ 12	,680.00	\$ 21	,350.00	\$ 35	5,730.00	\$	-	\$ 1,	500.00	\$ 23	,060.00			\$	- \$	-	\$	1,150.00)\$	-	\$	-	\$	649,460.00	Task 8	CA
ask 9 Commissioning and LEED		\$	5,700.00	0 \$	-	- \$	ş	-	\$ 4,3	335.00	\$ 1	1,200.00	\$	-	\$	-	\$ 1	,040.00	\$ 1	1,140.00	\$	-	\$	-	\$ 10	,180.00			\$	- \$	-	\$	-	\$	-	\$	-	\$	23,595.00	Task 9	Commission
sk 10 Project Closeout	1 mo	\$	25,920.00	0\$	-	- \$	\$ 8,310	0.00	\$ 12,8	805.00	\$ 4	4,950.00	\$ 2	,670.00	\$ 6	,440.00	\$ 4	,260.00	\$ 7	7,580.00	\$	-	\$	-	\$ 1	,540.00	\$ 20,12	25.00	\$	- \$	-	\$	115.00)\$	-	\$	-	\$	94,715.00	Task 10	CO
		Archite	cture+Interi	iors S	pecificatio	ons	Structura	ral M	MEP/Sust	tainability	Elec	ctrical	Techr	nology	Ci	ivil	Lands	scape	Enve	elope	Estim	nator	Acou	stics	Sustai	nability	FIM		see SS bel	ow	Survey		Arborist	Geote	ech/Enviror	n La [,]	nd Use	\$	3,349,616.00		
SUB TOTAL	S COBID	\$	1,680,425.00	0 \$	50,210.	.00 \$	398,850	0.00	\$ 372,2	275.00	\$ 107	7,600.00	\$ 66	,265.00	\$ 136	,425.00	\$ 139	,625.00	\$ 79	9,380.00	\$ 64,	,500.00	\$ 10,	660.00	\$ 111	,690.00	\$ 31,92	25.00	\$	- \$	39,260.	00 \$	4,600.00	\$	30,390.00	\$ 7	25,536.00	\$	3,349,616.00	Total Pro	osed Fee
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Contingencies General Contingency																													\$ 100,000									\$	100,000.00	General C	ontingency
Value Engineering Contingency																													\$ 35,000	.00								\$	35,000.00	Value Eng	ineering Continger
Potential Additional Consultan	nts	s		\$		- 9	5		\$	-	\$		s		s		\$		\$		\$		\$		s				\$	- \$		\$	-	\$		s		s		JLA	
Community Engagement *K Ballard*King & Associates LTD		Ŧ		*									-				÷		÷											Ŷ		2		÷		÷		¢		B*K	
Recreation and Operations Cons	sultant																																					Ŷ	-		
VTI Water Technologies Inc. Aquatic Consultants																																						\$	-	WTI	
IAI Halliday Associates, Inc. Kitchen Consultants																																						\$	-	HAI	
KAI Kittelson & Associates, Inc Transportation Engineering & Pla	lanning																																					\$	-	KAI	
	÷																																								
Contract Totals (if all services accepted	d	FFA S	1 714 425 00		Thrailkill				PAE MEF \$ 375.2		PAE/Sa		PAE Te		Vega		Mayer/F		MH \$ 80	230.00	RLB		ADS \$ 10		S 112		Praxis \$ 31,92	25.00	s	- \$		00 \$	4,600.00	PBS	53 690 00		o Planning				
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			Role	ba	Project Designer∖ Partner	Project Manager	Project Architect/ Arch. Staff IV	≤ tec	= tec	or Jne	Interior Designer
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			Role	<u> </u>	r o c	μŖ	및 첫 첫 5	St A	ST ST	De	De la
			Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90
Teels 4	Durate ad Institution			+	+	• • • •		* · · · *	* · · •	+	
	Project Initiation										
1.1	Detailed Work Plan, Design Program, & Fee (In progress)	FFA									
	a. Scope of Work	All Team		1		4				2	
	b. Schedule	FFA		1		4					
	c. Detailed Workplan with Fee	All Team		2		40				2	
1.2	Client Kick-off Meeting (PP&R + FFA)	FFA		2	2	4	2	2			
1.3	A/E Team Kick-off Meeting (1-hour meeting)	All Team		1	1	4	2	1		1	
			Hours	7	3	56	4	3	0	5	0
			Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90
			Fee	\$1,680	\$630	\$8,960	\$560	\$420	\$0	\$625	\$0
				3.50	1.50	28.00	2.00	1.50	0.00	2.50	0.00
Task 2	Pre-Design Assessment (RFP Tasks 2 & 4)			0.00		_0.00			0.00		0.00
2.1.	Review PP&R provided facility information					8	16	8		2	
2.2.	Develop/Distribute base plans and templates							24			
2.3.	Conduct Assessment Site Visits (1 visit + 1 follow-up)					6	8	8		4	4
2.4.	A/E Team Coordination Meetings (Three, One, 1-hour each)					2	2	1		2	2
2.5.	Building Assessment Report - Areas to remain (RFP Task 2)	Core desig	an team -	+ PBS		-	-	•		2	2
2.0.	a. Structural Investigations	ABHT	gir touin	1 00		4	8			-	-
	b. Code research and analysis	/\BIII				8	20	8			
	c. Document existing conditions					4	20	24			
	-					•					
	d. Hazardous Materials Assessment					4	8	12		1	
	e. Building Assessment Report				1	4	8	16			
2.6.	Site Survey (RFP Task 4)	KPFF					-	-			
	a. Private Utility Locates for sitework					4	2	2			
	 b. Site survey (Full park site property lines and trees) 					1	4	4			
2.7.	Site Investigations & Assessment	ALL TEAN					-				
	a. Site, zoning, and regulatory research and analysis	Vega, PA	E, FFA		1	4	8	16			
	b. Geotechnical exploration and report	PBS				4	8	4			
	c. Stormwater Management Assessment (SWMM)	Vega				2	4				
	d. Tree Assessment Survey & Report	PTC/MR				1	8				
	e. Site Assessment Report					4	12	20			
2.8	Quality Assurance Review			1	1	2	2				
2.9	Revisions and Issue Electronic Draft Reports					1	2	6			
2.10.	Review with Owner and Track comments	FFA				1	2				
2.11	Incorporate Owner Comments & Issue Final Reports						2	2		2	1
			Hours	1	3	64	144	155	0	13	9
			Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90

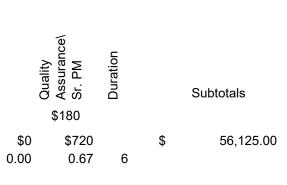
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0 \$0	4 \$180

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			Architectu	re							
		Role	Principal	Project Designer\ Partner	Project Manager	Project Architect/ Arch. Staff IV	Architectural Staff IV	Architectural Staff II	Interior Designer III	Interior Designer I	
		Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	
		Fee	\$240 0.17	\$630 0.50	\$10,240 10.67	\$20,160 24.00	\$21,700 25.83	\$0 0.00	\$1,625 2.17	\$810 1.50	
Task 3	Pre-Design Framework (RFP Task 3)										
3.0.	 Meetings Resilience/ Eco and High-Performance Goal setting workshops (Two 3- a. hour meetings) b. LEED Owner's Project Requirements (OPR) Kick-off meeting 	FFA/PAE/BW BW/PAE/FFA/MR	6 2	6 2	24 2	32 8	32 2		4	4	
	c. A/E coordination meetings (Four 1-hour each)	Core design team	E	4	8	8	4		2	2	
3.1	 Building Performance Workshop Summary (includes resilience and sustainal a. modeling) b. Site and Irrigation c. Structural Engineering d. Building Enclosure/Envelope e. Interior Systems – Construction Products and Finish Materials. f. Mechanical Engineering g. Lighting Design – Interior and Exterior h. Electrical Engineering 	-		1		4 2 2 2 2 2 2 2 2 2	2 1 2 2 1 1		16 8	32 16	
3.2	i. Quality Assurance Review j. Draft Outline Building Performance Strategies	PAE/All team	1	1	1 2	1 8	1 4		4	8	
5.2	 a. Meeting with PP&R Operations - systems discussion b. Facilities Management focus group - FIM requirements c. High-Performance Building Plan Strategy options d. Quality Assurance Review e. Draft Strategies 	FFA/PAE/Praxis	1	1	2 2 1 2 1	4 8 4 1 4	4 4 4		2	2	
3.3	LEED Owner's Project Requirements (OPR) Development a. OPR Follow-up Meetings b. OPR Summary Draft				4	7 1			2 1	2 2	
3.4	 Program Refinement Tour similar facilities in the region with stakeholders (Two half day a. tours) b. Community Engagement - Values and Programming c. Focus Group Meetings (Spatial, MEP, & FF&E requirements) d. Quality Assurance Review e. Draft Summary 	FFA FFA/BW/MR FFA/PAE			10 0 4 2 1	12 0 16 4	0 16 12		8 0 12 8 20	8 0 32 32	
3.5	Review with Owner and Track comments	FFA			2	4			2	2	
	Incorporate Owner Comments & Issue Final Reports	All team				4	4		4	8	

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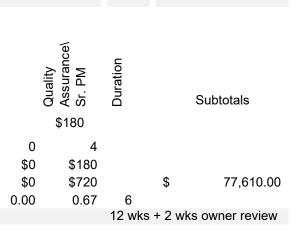
6 wks - overlaps with task 2

1

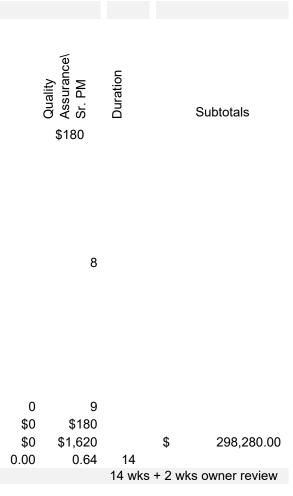
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			А	rchitectur	e						
			Role	cipai	Project Designer∖ Partner	Project Manager	Project Architect/ Arch. Staff IV	Architectural Staff IV	Architectural Staff II	Interior Designer III	Interior Designer I
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			Rate	- \$240	\$210	\$160	\$140	\$140	\$110	 \$125	 \$90
		R	ours Rate Fee	10 \$240 \$2,400 1.67	15 \$210 \$3,150 2.50	69 \$160 \$11,040 11.50	148 \$140 \$20,720 24.67	98 \$140 \$13,720 16.33	0 \$110 \$0 0.00	96 \$125 \$12,000 16.00	154 \$90 \$13,860 25.67
Task 4	Schematic Design (RFP Tasks 5 & 6)				2.00				0100		
4.0	Meetings										
	a. Owner-Architect meetings (bi-weekly)b. A/E coordination meetings (weekly, 1-hour)c. Preliminary LEED scorecard meeting	Core design te	eam r	4 egularly,	8 8 1	28 12 1	14 24 2	12 1	12	6 3 2	
	d. Sustainable Procurement kick-off meeting and documentation	BW				1	1	·		2	
4.1	Develop Three (3) Concept Options										
	a. Site and Building plans				12	12	24	24	40	10	24
	b. Shoebox Energy Model for massing concepts COVE tool	FFA/PAE			1	1	8				
	c. Narratives and LEED strategies	ALL			2	2	12	12	2	5	
	d. Cost estimates				0	4	4	0	0	3	
4.0	e. Quality Assurance, revisions, and issue package			1	2	2	6	6	6	2	
4.2	<u>Design Charrette One</u> : Three design schemes and select preferred a. Electronic presentation and presentation boards	FFA, BW/MR	prep		2	4	8	8	16	4	o
	b. Charette (4 hrs)			4	2 4	4 5	o 6	o 4	6	4	8 4
4.3	Develop Preferred Concept			1	8	8	16	16	32	40	20
4.4	Discuss strategy for continued pool operation during construction			•	4	8	8	10	02		20
	(fee only for exploring options, full design NIC)				-	-	-				
4.5	Design Charrette Two: Preferred option (4 hours)	FFA									
	a. Electronic presentation and presentation boards				2	4	8	8	12	4	8
	b. Charette (4 hrs)			4	4	5	6	4	6	4	4
4.6	<u>Furniture Design</u> - Develop Layouts and Furniture Vision										10
	a. Client Meeting - Review furniture layout options / select preferred optionb. Furniture Visioning Meeting with client and track comments				1	1				8 4	16 8
4.7	Performance Tracking Reports for Certification/Green Design Requirements	BW								4	0
4.7	a. LEED & Green Building Policy Checklists	BW				4	8	8		2	2
	b. Energy Model for system selection (Utilizing Schematic 3D Model)	PAE				4	8	0		2	2
4.8	Define scope of work for PP&R to select Commissioning Agent	. / _				2	0	8			
4.9	<u>Pre-Application with City of Portland</u>	AP led proces	S			-		U			
	a. Pre-Application package	AP/FFA/Vega/				4	8	12	12		
	b. Pre-application Conference	FFA/Vega/AP			1	1	1		_		
	c. Pre-application notes response	ALL TEAM				2	4				
4.10.	<u>100% Schematic Design Package</u> - Assume alternates are included										
	a. Drawings				36	54	180	324	324	20	80
	b. Outline Specification & Narratives					16	16	4	4	24	16



Update	d 4.9.2021										
				FFA Arch	itecture +	Interiors					
				Architectu	re						
			Role	Principal	Project Designer\ Partner	Project Manager	Project Architect/ Arch. Staff IV	Architectural Staff IV	Architectural Staff II	Interior Designer III	Interior Designer I
			Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90
	Include preliminary LEED Scorecard and high performances measures										
						2	12			2	_
	c. Cost Estimate	RLB/team	review			8	12			3	2
	d. Design and Construction Schedule					4				0	10
	e. Preliminary FF&E list and costs f. Assemble package					1		2	8	8	16
				1		4	8	2	0	8	
	 g. Quality Assurance review and checklists h. Revisions and Issue Report 			1		4 8	8	8		0	
4.11	Present SD package to Owner's staff	FFA		1	1	1	1	0		8	16
4.12	Plan Review Meeting with Owner's staff	FFA/PAE/	Vega	•	2	2	2	2		2	4
	a. Track comments and provide A/E response	ALL				1	4	4		2	4
4.13	Community Presentation (Public Involvement Plan Presentation #1)										
	a. Prepare renderings and presentation materials	FFA/MR		1	8	4	16	20	20	8	16
	b. Community input summary report	FFA			1	2	2	8	16	2	4
			Hours Rate Fee	17 \$240 \$4,080	108 \$210 \$22,680	218 \$160 \$34,880	437 \$140 \$61,180	495 \$140 \$69,300	516 \$110 \$56,760	190 \$125 \$23,750	267 \$90 \$24,030
Tack A	Design Development (35% CDs) (RFP Tasks 6, 7, & 8)			1.21	7.71	15.57	31.21	35.36	36.86	13.57	19.07
5.0.	Meetings:										
0.0.	a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions)				4	8	4			8	8
	b. Client/Vendor Furniture coordination meetings (five meetings)				5	2				24	36
	A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1										
	c. hour)	Core desi	gn team	regularly,	8	16	32	16	16	6	6
	A/E Revit model updates due bi-weekly (prior to coordination meeting)						2	8			
5.1	<u>MEP System Selection</u> (RFP Task 7)	PAE led p	rocess				2	0			
0.1	a. MEP Systems Focus Group Meeting with PP&R	i / L lou p	100000		2	4	8				
	b. Develop Energy Conservation Measures table						1				
	c. Energy Life-Cycle Cost Analysis-Life-cycle cost energy savings-					1	2				
	d. MEP systems Energy Life-Cycle Cost Analysis / Energy conservation					4	8	4			
	e. Energy Model update based on selected systems, LEED input					_	2	2			
	f. MEP Systems Selection Package Draft Report				1	2	4				
5.2	g. Owner review and comment, A/E response Systems, Equipment, and Materials Review Meetings (RFP Task 8.10)					2	4	4			
0.2	a. Building Exterior Materials Presentation and Owner Review Meeting				12	4	4	12	12		
	b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting				2	2	4			2	4
	c. Security, A/V, and Technology Systems Package and Owner				1	2	4			2	2
	d. Lighting and Energy Management Package and Owner Review Meeting				2	2	4			2	4



Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation

FFA Architecture and Interiors Team Updated 4.9.2021

			chilecture +	interiors					
		Archite	cture						
		Principal Brincipal	Project Designer\ Partner	Project Manager	Project Architect/ Arch. Staff N/	Architectural Staff IV	Architectural Staff II	Interior Designer III	Interior Designer I
		Rate \$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90
5.3	 e. Interior Finishes Presentation and Owner Review Meeting f. Track, respond, and incorporate owner comments for each meeting 50% Design Development Progress Package - Not priced - coordination only 	4 All toom	4	2 5		10		24 2	16 4
0.0	a. Drawings	Y All lean	42	2 56	140	210	224	22	80
	b. Outline Specifications		72	. 50		210	224	4	8
	Attach system and material packages Include draft envelope testing and commissioning requirements	PAE MH/PAE/BW		0	2	2 2		4	0
	c. Outline of furniture specifications and proposed color boards	FFA	1	1				53	85
	d. Cost estimate in CSI format	RLB/team review		0	0			0	0
	e. Updated Design & Construction Schedule			2					
	f. Assemble package					2	8		
	g. Quality Assurance Review		1	8	8			8	
5.4	Progress review meeting with the Owner's Project Manager	FFA	1	2	2	1		2	2
	Owner review and comments. A/E track and provide response			2	8	4		2	8
5.5	Value Engineering, as required (RFP Task 8.8)		C			0	0	0	0
5.6	Land Use Review - Assumed Type III Review (RFP Task 6)	6-12 months							
	a. Neighborhood meeting (Public Involvement Plan Presentation #2)							2	4
	1. Notification and presentation materials for Neighborhood meeting	FFA	2	2 2	16	24	24		
	2. Neighborhood meeting	FFA/AP/MR	2						
	3. Attendance list and meeting notes	AP		1	4				
	b. Land Use Package	AP							
	 Development, Draft Report, internal review (Including support drawings, tree plan, reports, and materials board) 	All team	2	. 8	8	20	32		
	2. Final Package & Submittal		1	1	2	4	8		
	c. Public Hearing		1	1	1				
5.7	Public Works Permit (PWP) Process a. Submit PWP Concept package	Vega submitting		1	2				
	b. AHJ Package Review meeting			1	1				
5.8	100% Design Development Package (35% Construction Documents)								
	a. Drawings (RFP Task 8.11)		35	5 56	140	210	224	22	84
	b. Specifications			4	8			12	20
	c. Cost Estimate	RLB/team review		3	8			2	8
	d. Quality Assurance review and checklists		1	8	_			8	
	e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)	All team		4		8			
5.9	Performance Tracking Report Update (RFP Task 8.12)								
	a. LEED & Green Building Policy Checklists			1	2	2		1	3
	b. Energy Model update based on selected systems			0	-	0			
	c. Life-Cycle Cost Analysis Update			2	2	2			

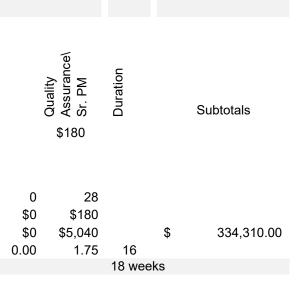
FFA Architecture + Interiors

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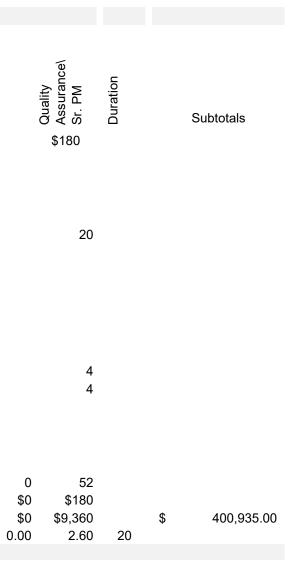


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Update	d 4.9.2021											
			F	FA Arch	itecture + I	nteriors						
			A	Architectu	re							
								=	_			
					_		_ ff	Architectura Staff IV	Architectural Staff II	Interior Designer III	_	
				ga	r Jer	jer Jer	ect. Sta	< ect	ecti	- Jer	_ Jer	
					jec sigr	jec	hite hite	H L	hite fff	ign ign	igi aigi	
			Role	Principal	Project Designer∖ Partner	Project Manager	Project Architect/ Arch. Staff	Architec Staff IV	Arc Star	Des	Interior Designer I	
			Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	
5.10.	Plan Review Meeting with Owner's staff	FFA/PAE			2	2	2	2				
	a. Track comments and provide A/E response					1	4	4		2	4	
			Houro	2	120	000	469	EED	E 4 0			
			Hours	2	130	233	468	553	548	210	386	
			Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	
			Fee	\$480	\$27,300	\$37,280	\$65,520	\$77,420	\$60,280	\$26,250	\$34,740	
				0.13	8.13	14.56	29.25	34.56	34.25	13.13	24.13	
	Construction Documents (RFP Task 9)											
6.0.	Meetings											
	a. Owner-Architect Meeting				10	10	10			8	8	
	b. Client/Vendor Furniture coordination meetings (five meetings)				5	5	5			68	120	
	c. A/E team coordination meeting (bi-weekly - 1 hour)	Core desig	gn team i	egularly,	10	10	18	18	9	5	5	
	A/E Revit model updates due bi-weekly (prior to coordination											
0.4	meeting)					4	0	10				
6.1	Public Works Permit (PWP) Process					1	2					
	a. Submit PWP Design package b. AHJ Package Review meeting					1	1					
6.0	<u>75% CD Progress Package</u> (RFP Task 9.1)					I	I					
6.2					40	00	240	204	400	40	100	
	a. Drawings				48	96	312	384	432	40	100	
	b. Specifications					8	8	4		12	8	
	c. Updated Performance Tracking Reports											
	LEED & Green Building Policy Checklists					1	2			2	1	
	Energy Model based on selected systems (PAE confirm timing)					1	2					
	Life-Cycle Cost Analysis					0	0					
	d. Preliminary Calculations						0				0	
	e. Cost Estimate	RLB/team	review			4	8			1	2	
	f. Design & Construction Schedule				-	2						
	g. Final Update finishes board (interior and exterior)				2	2	4	4	16	12	12	
	h. Issue Tracking log							8				
	i. Quality Assurance - copy of redline set			1	2	8	8			8		
6.3	Plan Review Meeting with Owner Team (RFP Task 9.1.18.2)	FFA			2	2	2	2				
	a. Track, respond, and incorporate owner comments					1	4	4		2	4	
6.4	Systems, Equipment, and Materials Update (RFP Task 8.10)											
	a. Building Exterior Materials Presentation and Owner Review Meeting				0	0	0	0	0			
	b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting				0	0	0	0		0	0	
	Security, A/V, and Technology Systems Package and Owner Review					~		-		-		
	c. Meeting				1	2	4	2		2	4	
	d. Lighting and Energy Management Package and Owner Review Meeting				2	2	4	2		2	4	
	 e. Interior Finishes Presentation and Owner Review Meeting f. Track, respond, and incorporate owner comments for each meeting 				4	2 5	5	10		8 2	12 4	
	I. Track, respond, and incorporate owner comments for each meeting					5	5	10		2	4	

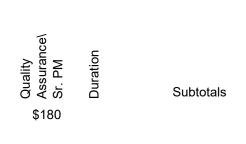


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				-	-Le	5	Project Architect/ Arch. Staff	Architectura Staff IV	Architectural Staff II	Interior Designer III	- -
				ipa	act gne	sct age	N ited	≤it	= ite	gne	gne
			Role	ling	Project Designer∖ Partner	Project Manager	Project Architect/ Arch. Sta	Architec Staff IV	taff	esi	Interior Designer I
			Role	<u> </u>	ה ם ה	αΣ	도 주 주 5	A N	₹ iO	드 ㅇ	드 ㅇ
			Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90
6.5	<u>95% CD Progress Package</u> (RFP Task 9.2)										
0.5	a. Drawings				36	48	168	192	216	28	80
					50	40	6	192	210	20 6	4
	 b. Specifications (incorporating LEED lists and list of O&M requirements) c. Full Design Calculations 					0	1			0	4
	d. Quality Assurance review			1	1	6	6			8	
	e. List identifying anticipated long lead items (9.2.5)			I	1		2			0	
67						2		2			
6.7	Plan Review Meeting with Owner Team (9.2.7.2)	FFA/PAE			2	2	2	2		0	4
6.0	a. Track, respond, and incorporate owner comments					1	4 2	4		2	4
6.8	Public Works Permit (PWP) Process a. Submit PWP Final package					I	Z				
	b. AHJ Package Review meeting					1	1				
6.9	<u>100% Construction Documents</u> / Permit Submittal to PP&R PM	All Team									
0.0	a. Stamped Drawings	Airreann		4	4	12	16	12	24	8	20
	b. Stamped Specifications			2		8	2	12	27	6	4
				2		0	2			0	4
		RLB/team	roviow	1		2	1			1	2
	 d. Updated Cost Estimate e. Permit Application Forms and support documentation 	RLD/lealli	leview	I		2 8	4			I	2
C 10					1	0	4				
6.10.	Owner review and approval					I	I				
			Hours	9	131	261	619	658	697	231	398
			Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90
			Fee	\$2,160	\$27,510	\$41,760	\$86,660	\$92,120	\$76,670	\$28,875	\$35,820
_				0.45	6.55	13.05	30.95	32.90	34.85	11.55	19.90
	Permitting and Bidding (RFP Task 10)										
7.0.	Owner-Architect Update Meetings (monthly)				1	4	4				
7.1	Permitting								-		
	a. Submit for Permit				_	4	4	16	2		
	 Permit check sheet responses and tracking 				8	32	256	64			
7.2	Bidding										
	a. Prepare Bid Set Documents										
	b. Pre-Bid Conference										
	c. Bid Phase A/E Services			-	4	20	60	40		_	_
7.3	Value-Engineering and reissuance (if all bids exceed cost estimate by 20%)			0	0	0	0	0	0	0	0
7.4	Public Works Permit (PWP) Process										
7.5	 Submit Final Vellum package LEED Design Phase Review/Complete LEED Documentation 					2	4				
1.5	LED Design i hase neview/complete LED Documentation		Llas	-	4.0			100	~	~	•
			Hours	0	13	62	328	120	2	0	0
			Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90
			Fee	\$0	\$2,730	\$9,920	\$45,920	\$16,800	\$220	\$0	\$0



Update	d 4.9.2021										
					tecture +	Interiors					
			Ar	chitectur	e						
			Role Rate		Project Designer\ Dartner	Project Manager	Project Architect/ Arch. Staff IV	Architectural Staff IV	Architectural \$111 011	Interior Designer III \$152	Interior 66 Designer I 06
			Rate	\$240	ΦΖΙΟ	\$160	 φ140	\$140	ΦΠΟ	\$120	2 90
Task 8	Construction Administration (RFP Task 11)										
8.0.	Meetings										
	 a. Pre-Construction Meetings 1. Contractor Kick-off Pre-construction Meeting 2. LEED Pre-construction Meeting 3. Specialty and System Pre-construction Meetings 				2	4 2 10	2 4 10				
	 b. Owner-Architect-Contractor Meetings: Weekly Site Visits and Observation Reports - four times per month min. 2x per 					156	156				
	c. month min. (by A/E team - not each consultant)d. Client/Vendor Furniture coordination meetings (five meetings)				18 5	39	234			40	80
8.1	e. LEED update meetings (every 4-6 weeks 9 meetings) <u>Construction Administration Services</u> (RFP Tasks 11.4-11.7)					12	30				
	a. Submittals				36	60	480			20	80
	b. RFIs/ASI's/PCOs				36	156	780			38	18
	c. Certification of Payment Applications					9	36				
	 d. Changes, CO/PCO/CCD for owner review Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10) 					16	16				
	e. 11.10.) Envelope testing	MH/FFA				12	20				
	a. Mock up Reviews					8	8				
	b. Window Testing					4	4				
8.3	Furnishing Installation Punch List Observations (review of Vendors punch list and furnishings outside of vendors purview)	FFA			1					10	10
8.4	Testing and Balancing (Commissioning agent coordination in Task 9)					4				10	10
•••	a. Attend Equipment or System Start up/Testing					2	10				
8.5	 Testing and balancing observations and Test Data Reviews Substantial Completion Process 	All Team				1	4				
	a. Review General Contractor issued substantial completion punch list					1	1				
	b. A/E Punch List Observations and Reports			1	1	12				8	12
	c. Back punch walk of contractor completed punch listd. Issue Certificate of Substantial Completion			1 1	1	4 1	12 2				
8.6	Certificate of Occupancy					1					
			Hours	3	100	514	1833	C		-	200
			Rate Fee	\$240 \$720	\$210 \$21,000	\$160 \$82,240	\$140 \$256,620	\$140 \$0			\$90 \$18,000

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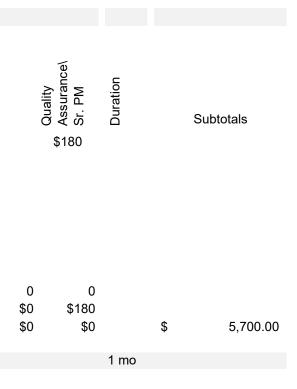
0 0 \$0 \$180 \$0 \$0

Updated 4.9.2021

					4						
					tecture +	nteriors					
			A	Architectur	e						
		R	Role (rincipal	Project Designer\ Partner	Project Manager	Project Architect/ Arch. Staff IV	Architectural Staff IV	Architectural Staff II	Interior Designer III	Interior Designer I
		R	late	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90
9.0. 9.1	 A/E coordination of owner provided Commissioning and Testing a. Attend commissioning meetings (minimum of five meetings) b. A/E coordination with owner provided Commissioning Agent c. Testing and balancing observations and Test Data Reviews see 8.4 b. LEED Submission a. LEED Construction-Phase and Final Certification Review 					5 2 0	10 10 0 8			4	
	b. LEED Submission						· ·				
		R	ours Rate Fee	0 \$240 \$0	0 \$210 \$0	8 \$160 \$1,280	28 \$140 \$3,920	0 \$140 \$0	0 \$110 \$0	4 \$125 \$500	0 \$90 \$0
Task 10) Project Closeout (RFP Task 11 & 14)										
10.1	Asset Management Plan - Review contractor and Praxis deliverables a. Review Plan and evaluate maintenance and life-cycle information b. Review Facility Information Model (FIM)	Praxis PAE/FFA/MH PAE/FFA/MH				4 8 4	8 8				
10.2	<u>Final Completion Observations</u> (RFP 14.6) a. Two (2) comprehensive punch list closeout observations and updates	ALL TEAM		1		8	16				
10.3	Furnishing Final Completion Observation and Closeout			1		1	10			8	12
10.4	Project Closeout Documents (RFP 14.7)										
	 Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models Reproducible Record Drawings (PDF) 	ALL TEAM				8	32 8				
	b. Operations & Maintenance Manual and closeout document reviewsc. Close out coordination	ALL TEAM FFA				2 16	16 16				
10.5	Issue Final Payment after owner final acceptance	FFA				2	4				
		R	ours Rate Fee	1 \$240 \$240	0 \$210 \$0	53 \$160 \$8,480	108 \$140 \$15,120	0 \$140 \$0	0 \$110 \$0	8 \$125 \$1,000	12 \$90 \$1,080

EX Expenses

Total Expenses



2 0	0 \$0	0 \$180			
0	\$0	\$0	\$	25,920.00	
	TOTAL	- FEES	\$	1,680,425.00	
			¢	24 000 00	¢ 00.000 F0
			\$	34,000.00	\$ 33,608.50
	Contra	ct Total	\$	1,714,425.00	

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Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team

					ill.Archited		t Manual								
			Role Rate	Principal Principal S225	Senior Specifier 140	Junior Specifier 140	Architect Intern 001\$	Office Admin 58\$	Role 0\$	Role \$0	Role 0\$	Role 0\$	Role	Duration	Subtotals
Task 1.1 1.2 1.3	1 Project Initiation Detailed Work Plan, Design Program, & Fee (In progress) a. Scope of Work b. Schedule c. Detailed Workplan with Fee Client Kick-off Meeting (PP&R + FFA) A/E Team Kick-off Meeting (1-hour meeting)	FFA All Team FFA All Team FFA All Team													
			Hours Rate Fee	0 \$225 \$0	\$170	\$140	\$100	\$85	; •	50 5		0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	\$-
Task 2	2 Pre-Design Assessment (RFP Tasks 2 & 4)													4-6 wk	5
2.1. 2.2. 2.3. 2.4. 2.5.	Develop/Distribute base plans and templates Conduct Assessment Site Visits (1 visit + 1 follow-up) A/E Team Coordination Meetings (Three, One, 1-hour each)	Core desig ABHT	ın team ·	+ PBS											
2.6.	 d. Hazardous Materials Assessment- Confirm scope, see existing PPR reports e. Building Assessment Report Site Survey (RFP Task 4) 	KPFF													
2.7.	 a. Private Utility Locates for sitework b. Site survey (Full park site property lines and trees) Site Investigations & Assessment a. Site, zoning, and regulatory research and analysis b. Geotechnical exploration and report c. Stormwater Management Assessment (SWMM) d. Tree Assessment Report e. Site Assessment Report 	ALL TEAM Vega, PAE PBS Vega PTC/MR													
2.8 2.9 2.10. 2.11	Quality Assurance Review Revisions and Issue Electronic Draft Reports Review with Owner and Track comments	FFA													
			Hours Rate Fee	0 \$225 \$0	\$170	\$140	\$100	\$85	; \$	50 S		0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	\$ -

Task 3 Pre-Design | Framework (RFP Task 3)

3.0. Meetings

Resilience/ Eco and High-Performance Goal setting workshops (Two 3-hour FFA/PAE/BW

- a. meetings)
- b. LEED Owner's Project Requirements (OPR) Kick-off meeting BW/PAE/FFA/MR

c. A/E coordination meetings (Four 1-hour each) Core design team

3.1 Building Performance Workshop Summary (includes resilience and sustainability SEE NPB Design Guide a. Whole Building Energy Performance PAE, FFA, BW

R2: 02.15.2021

	 b. Site and Irrigation c. Structural Engineering d. Building Enclosure/Envelope e. Interior Systems – Construction Products and Finish Materials. f. Mechanical Engineering g. Lighting Design – Interior and Exterior h. Electrical Engineering i. Quality Assurance Review j. Draft Outline 	Vega/MR ABHT FFA/MH/BW FFA/BW PAE PAE PAE													
3.2	 Building Performance Strategies a. Meeting with PP&R Operations - systems discussion b. Facilities Management focus group - FIM requirements c. High-Performance Building Plan Strategy options d. Quality Assurance Review e. Draft Strategies 	PAE/All team													
3.3	LEED Owner's Project Requirements (OPR) Development a. OPR Follow-up Meetings b. OPR Summary Draft														
	Program Refinement a. Tour similar facilities in the region with stakeholders (Two half day tours) b. Community Engagement - Values and Programming c. Focus Group Meetings (Spatial, MEP, & FF&E requirements) d. Quality Assurance Review e. Draft Summary Review with Owner and Track comments	FFA FFA/BW/MR FFA/PAE FFA													
5.5	Incorporate Owner Comments & Issue Final Reports	All team H		0 \$225	0 \$170	0 \$140	0 \$100	0 \$85	0 \$0	0 \$0	0 \$0	0 \$0	0 \$0		
			Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	-
	Schematic Design (RFP Tasks 5 & 6) <u>Meetings</u> a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation	Core design t	eam regu	larly, othe	er consulta	nts as nee	dec						12	! wks + 2 wks o	wner review
4.1	a. Soldamentation Toolarina Record meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates	FFA/PAE ALL													
	 e. Quality Assurance, revisions, and issue package <u>Design Charrette One</u>: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) 	FFA, BW/MR	prep												
4.3 4.4 4.5	Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours)	FFA													
	a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision														
	 a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments 	DIA													
	Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model)	BW BW PAE													
4.8 4.9															
	Define scope of work for PP&R to select Commissioning Agen! <u>Pre-Application</u> with City of Portland a. Pre-Application package	AP led proces AP/FFA/Vega	/MR												
4.10.	Pre-Application with City of Portland		/MR												

4.12	Include preliminary LEED Scorecard and high performances measures c. Cost Estimate d. Design and Construction Schedule e. Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report Present SD package to Owner's staff Plan Review Meeting with Owner's staff a. Track comments and provide A/E response Community Presentation (Public Involvement Plan Presentation #1); a. Prepare renderings and presentation materials b. Community input summary report	RLB/team r FFA FFA/PAE/V ALL FFA/MR FFA	'ega Hours	4	12	8	10	4	0	0	0	0	0		
			Rate Fee	\$225 \$900	\$170 \$2,040	\$140 \$1,120	\$100 \$1,000	\$85 \$340	\$0 \$0	\$0 \$0	\$0 \$0	\$0 \$0	\$0 \$0	\$	5,400.00
Task 5	Design Development (35% CDs) (RFP Tasks 6, 7, & 8)												14	wks + 2 wks o	owner review
	Meetings:														
	a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions)														
	 b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour) 	Core desig	e te e re	aularly of	haraanaul	tanta ao no	odoo								
	A/E Revit model updates due bi-weekly (prior to coordination meeting	Core design	ii leann le	gulariy, ou	ner consu	itants as ne	eueu								
5.1	MEP System Selection (RFP Task 7)	PAE led pro	ocess												
	a. MEP Systems Focus Group Meeting with PP&R														
	b. Develop Energy Conservation Measures table Energy Life-Cycle Cost Analysis Life-cycle cost energy savings evaluation /														
	c. Energy Conservation Measures														
	MEP systems Energy Life-Cycle Cost Analysis / Energy conservation														
	 d. opportunities e. Energy Model update based on selected systems, LEED input 														
	f. MEP Systems Selection Package Draft Report														
	g. Owner review and comment, A/E response														
5.2	<u>Systems, Equipment, and Materials Review Meetings</u> (RFP Task 8.10) a. Building Exterior Materials Presentation and Owner Review Meeting														
	b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting Security, A/V, and Technology Systems Package and Owner Coordination														
	c. Review Meeting														
	 Lighting and Energy Management Package and Owner Review Meeting Interior Finishes Presentation and Owner Review Meeting 														
	f. Track, respond, and incorporate owner comments for each meeting														
5.3	50% Design Development Progress Package - Not priced - coordination only a. Drawings	All team			10	10									
	 b. Outline Specifications Attach system and material packages 	PAE		4	12	16	20	4							
	Include draft envelope testing and commissioning requirements	MH/PAE/B	N												
	c. Outline of furniture specifications and proposed color boards	FFA													
	d. Cost estimate in CSI format e. Updated Design & Construction Schedule	RLB/team r	eview												
	f. Assemble package														
	g. Quality Assurance Review														
5.4	Progress review meeting with the Owner's Project Manager	FFA													
55	Owner review and comments. A/E track and provide response Value Engineering, as required (RFP Task 8.8)														
5.6	Land Use Review - Assumed Type III Review (RFP Task 6)	6-12 month	IS												
	a. Neighborhood meeting (Public Involvement Plan Presentation #2)														
	 Notification and presentation materials for Neighborhood meeting Neighborhood meeting 	FFA FFA/AP/MF	2												
	3. Attendance list and meeting notes	AP	`												
	b. Land Use Package	AP													
	1. Development, Draft Report, internal review	All team													
	(Including support drawings, tree plan, reports, and materials board) 2. Final Package & Submittal														
	c. Public Hearing														
5.7	Public Works Permit (PWP) Process	Vega subm	itting												

	 a. Submit PWP Concept package b. AHJ Package Review meeting <u>100% Design Development Package</u> (35% Construction Documents) a. Drawings (RFP Task 8.11) b. Specifications c. Cost Estimate d. Quality Assurance review and checklists e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab) <u>Performance Tracking Report Update</u> (RFP Task 8.12) a. LED & Green Building Policy Checklists b. <u>Energy Model update based on selected systems</u> c. Life-Cycle Cost Analysis Update Plan Review Meeting with Owner's staff a. Track comments and provide A/E response 	F	ours Rate Fee	4 \$225 \$1,800	26 \$170 \$4,420	33 \$140 \$4,620	21 41 \$100 \$4,100	4 \$85 \$680	0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	\$	15,620.00
	Construction Documents (RFP Task 9)												18	weeks	
6.0.	Meetings a. Owner-Architect Meeting b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly - 1 hour) A/E Revit model updates due bi-weekly (prior to coordination meeting)	Core design t	eam re	egularly, oth	ner consult	ants as ne	edec								
6.1	Public Works Permit (PWP) Process a. Submit PWP Design package b. AHJ Package Review meeting														
6.2	<u>75% CD Progress Package</u> (RFP Task 9.1) a. Drawings				10	10									
	 b. Specifications c. Updated Performance Tracking Reports LEED & Green Building Policy Checklists Energy Model based on selected systems (PAE confirm timing) Life Cycle Cost Analysis 			4	12	16	20	4							
	d. Preliminary Calculations e. Cost Estimate f. Design & Construction Schedule	RLB/team rev	view												
	 Final Update finishes board (interior and exterior) h. Issue Tracking log 														
6.3	 Quality Assurance - copy of redline sel Plan Review Meeting with Owner Team (RFP Task 9.1.18.2) a. Track, respond, and incorporate owner comments 	FFA													
6.4	<u>Systems, Equipment, and Materials Update (RFP Task 8.10)</u> a. Building Exterior Materials Presentation and Owner Review Meeting b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting Security, A/V, and Technology Systems Package and Owner Review c. Meeting														
	 Lighting and Energy Management Package and Owner Review Meeting Interior Finishes Presentation and Owner Review Meeting Track, respond, and incorporate owner comments for each meeting 														
6.5	25% CD Progress Package (RFP Task 9.2) a. Drawings b. Specifications (incorporating LEED lists and list of O&M requirements) c. Full Design Calculations			4	12	16	20	4							
6.7	 d. Quality Assurance review e. List identifying anticipated long lead items (9.2.5) Plan Review Meeting with Owner Team (9.2.7.2) 	FFA/PAE													
6.8	a. Track, respond, and incorporate owner comments <u>Public Works Permit (PWP) Process</u> a. Submit PWP Final package b. AHJ Package Review meeting														
6.9	100% Construction Documents/ Permit Submittal to PP&R PM a. Stamped Drawings	All Team													
	b. Stamped Specificationsc. Stamped Final Design Calculations			4	13	16	27	4							

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7.0. Owner-Addited Usedange (monthly) 1 Examine 0 2. Stant for Print 0 3. Stant for Print 0 3. Program (Monthly) 4. 100 6 2 4. 100 6 2 5. Program (Monthly) 2 4 10 6 2 7. Patient Monthly Propriets 3 Stant 100 5 0	23,430.00
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House Pree 22 st450 4 st00 56 st00 0 st00	
Radio S225 S170 S140 S100 S05 S0	
8.0. Meetings a. Pro-Construction Meetings 1. Contractor Kok-off Pre-construction Meetings 2. LED Pre-construction Meetings 3. Specially and System Pre-construction Meetings b. Owner-Archited-Construction Meetings c. Outractor Meetings c. Outractor Meetings c. Outractor Meetings c. Department of Mathematic Meetings c. Outractor Meetings c. Department of Mathematic Meetings c. Construction Amministration Services e. ELED prediction Amministration Services c. Construction Amministration Services e. Distruction Amministration Services e. Owner review e. Owner review e. Mock up Rawse B. WrifeFA e. Mock up Rawse B. WrifeFA e. Mock up Rawse A. Horde Equipment of System State Contractor State Stat	3,300.00
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b. Owner-Architect-Contractor Meetings: Weekly Site Visits and Observation Regorts (five meetings) c. month min, (by AE team - not each consultant) d. Client/Vendor Function Administration Services (RFPT asks 11.4-11.7) a. Submittation b. RFIs/ASI's/PCOS c. Certification of Payment Applications d. Changes, CO/PCO/CCD for owner review a. Submittation d. Ontarges, CO/PCO/CCD for owner review e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.) Envelope testing a. Multi-FEA a. Multi-FEA g. Auton disting installation Punch List Observations (review of Vendors punch list and furnishings outside of vendors punchway) A. Testing and Balancing Observations and Test Data Reviews s. Busk punch wak for oontractor issued substantial completion punch list b. Atterd Equipment of System Start up/Testing b. Atterd Equipment of Substantial Completion punch list c. Back punch wak for oontractor or suppleted punch list d. Lissue Certificate of Substantial Completion punch list d. Testing and Balancing observations and Reports e. Back punch wak for oontractor or suppleted punch list d. Issue Certificate of Occupancy Hours 2	
 c. month min. (by AIE learn - not each consultant) d. Cilient/Vendor Limiture coordination meetings (five meetings):	
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b. RFIsASI/sPCOs c. Certification of Payment Applications d. Changes, CO/PCO/CDC for owner review e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.): Envelope testing a. Mock up Reviews b. Window Testing a. Mock up Reviews b. Window Testing a. Mock up Reviews b. Window Testing a. Attend Equipment or System Start up/Testing a. Attend Equipment or System Start up/Testing a. Attend Completion Process a. Review General Contractor issued substantial completion punch list b. KP Funch List Observations and Test Data Reviews a. Review General Contractor completed punch list b. AP Funch List Observations and Reports c. Back punch walk of contractor completed punch list b. AP Funch List Observations and Reports c. Back punch walk of contractor completed punch list b. AP Funch List of Substantial Completion c. Back punch walk of contractor completed punch list b. AP E contribution of Owner provided Commissioning and Testings	
 c. Changes, CO/PCO/COC for owner review e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.) Envelope lesting	
 e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.) Envelope testing a. Mock up Reviews b. Window Testing Firmishing Installation Punch List Observations (review of Vendors punch List Observations) (review of Vendors punch List and furnishings outside of vendors punview) (review of Vendors punch List Observations and Test Data Reviews b. Testing and Balancing (Commissioning agent coordination in Task 9	
 a. Mock up Reviews b. Window Testing Furnishing Installation Punch List Observations (review of Vendors punview) 7 Testing and Balancing (Commissioning agent coordination in Task 9) a. Attend Equipment or System Start up/Testing b. Testing and Balancing observations and Test Data Reviews 8.5 Substantial Completion Process a. Review General Contractor issued substantial completion punch list d. Issue Certificate of Substantial Completion 6. Each punch walk of contractor completion punch list d. Issue Certificate of Substantial Completion e. Back punch walk of contractor completion e. Attend Commissioning and TEST State e. Attend Commissioning meetings (minimum of five meetings) 	
 b. Window Testing a. Hurnishing Installation Punch List Observations outside of vendors purview; FFA FFA Festing and Balancing (Commissioning agent coordination in Task 9; a. Attend Equipment or System Start up/Testing b. Testing and balancing observations and Test Data Reviews 8.5 Substantial Completion Process a. Review General Contractor issued substantial completion punch list b. All Team All Team Hours a. Review General Contractor completed punch list b. Substantial Completion Completed punch list b. Substantial Completion Process a. Review General Contractor completed punch list b. AlF Punch List Observations and Reports c. Back punch walk of contractor completed punch list d. Issue Certificate of Occupancy Hours 2 8 2 2 2 2 0 0 0 0 Hours Signa Status 8 Fee 8 2 2 2 2 3 4 Hours Signa Status 8 4 4 4 5 5 5 5 5 5 6 7 7 8 8 9 9 All Cean 8 8 9	
 (review of Vendors punch list and furnishings outside of vendors purview) 8.4 Testing and Balancing (Commissioning agent coordination in Task 9. a. Attend Equipment or System Start up/Testing b. Testing and balancing observations and Test Data Reviews 8.5 <u>Substantial Completion Process</u> All Team a. Review General Contractor issued substantial completion punch list b. A/E Punch List Observations and Reports c. Back punch walk of contractor completed punch list d. Issue Certificate of Substantial Completion 8.6 Certificate of Occupancy Hours 2 8 2 2 2 0 0 0 0 0 0 0 0 0 0 0 Review Section 2000 Statial Completion punch list b. A/E Punch List Observations and Reports c. Back punch walk of contractor completed punch list d. Issue Certificate of Substantial Completion 8.6 Certificate of Occupancy Hours 2 8 2 10 0 0 0 0 0 0 0 0 0 0 Free Section 2000 Statial Completion punch list b. A/E Punch List Observations and Reports c. Back punch walk of contractor completed punch list d. Issue Certificate of Substantial Completion 8.6 Certificate of Occupancy Hours 2 8 2 170 \$140 \$100 \$85 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0	
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 8.5 <u>Substantial Completion Process</u> a. Review General Contractor issued substantial completion punch list b. A/E Punch List Observations and Reports c. Back punch walk of contractor completed punch list d. Issue Certificate of Substantial Completion 8.6 Certificate of Occupancy Hours 2 8 225 \$170 \$140 \$100 \$85 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0 \$0	
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d. Issue Certificate of Substantial Completion 8.6 Certificate of Occupancy Hours 2 8 2 2 0 0 0 0 Rate \$225 \$170 \$140 \$100 \$85 \$0	
Hours 2 8 2 2 2 0 0 0 0 0 0 0 Rate \$225 \$170 \$140 \$100 \$85 \$0	
Rate \$225 \$170 \$140 \$100 \$85 \$0 <td></td>	
 9.0. A/E coordination of owner provided Commissioning and Testing a. Attend commissioning meetings (minimum of five meetings) 	2,460.00
 9.0. A/E coordination of owner provided Commissioning and Testing a. Attend commissioning meetings (minimum of five meetings) 	
 Are contained with owner provide commissioning Agent Testing and balancing observations and Test Data Reviews see 8.4 b. 	

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9.1 LEED Submission

a. LEED Construction-Phase and Final Certification Review

b.	LEED	Submission	
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			Hours	0	0	0	0	0	0	0	0	0	0		
			Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	\$0	\$0	\$0		
			Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	-
ask 10	Project Closeout (RFP Task 11 & 14)												1	mo.	
10.1	Asset Management Plan - Review contractor and Praxis deliverables	Praxis													
	a. Review Plan and evaluate maintenance and life-cycle information	PAE/FFA/N	1H												
	b. Review Facility Information Model (FIM)	PAE/FFA/N	1H												
10.2	Final Completion Observations (RFP 14.6)	ALL TEAM													
	a. Two (2) comprehensive punch list closeout observations and updates														
10.3	Furnishing Final Completion Observation and Closeout														
10.4	Project Closeout Documents (RFP 14.7)														
	a. Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models	ALL TEAM													
	Reproducible Record Drawings (PDF)														
	b. Operations & Maintenance Manual and closeout document reviews	ALL TEAM													
	c. Close out coordination	FFA													
10.5	Issue Final Payment after owner final acceptance	FFA													
		FFA													
			Hours	0	0	0	0	0	0	0	0	0	0		
			Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	0 \$0	\$0	\$0		
				-				-			0 \$0 \$0			\$	-
			Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	0 \$0 \$0	\$0	\$0 \$0	\$	- 50,210.00
EY			Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	0 \$0 \$0	\$0 \$0	\$0 \$0	•	- 50,210.00
EX	Expenses		Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	0 \$0 \$0	\$0 \$0	\$0 \$0	•	- 50,210.0
EX			Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	0 \$0 \$0	\$0 \$0	\$0 \$0	•	- 50,210.00
EX	Expenses		Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	0 \$0 \$0	\$0 \$0	\$0 \$0	•	- 50,210.00

Contract Total \$ 50,210.00

0	0	0	0	0	0	0	0	0	0
			0						
\$225	\$170	\$140	\$100	\$85	\$0	\$0	\$0	\$0	\$0
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Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team Updated 4.9.2021

						L ENGINEE	ERS								
				STRUCTU	RAL										
			Role	Principal Principal 8210	Associate 165	Design Engineer 120	REVIT/CAD 122	Admin 86\$	음 2 \$100) 안 \$100	<u>*</u> 2 \$100	<u>*</u> 22 \$100	· 한 원 \$100	Duration	Subtotals
Task 1	Project Initiation														
1.1 1.2 1.3	Detailed Work Plan, Design Program, & Fee (In progress) a. Scope of Work b. Schedule c. Detailed Workplan with Fee Client Kick-off Meeting (PP&R + FFA) A/E Team Kick-off Meeting (1-hour meeting)	FFA All Team FFA All Team FFA All Team		8 16 1	1			4							
			Hours	25	1	0	0						0		
			Rate Fee	\$210 \$5,250	\$165 \$165		\$125 \$0						\$100 \$0		\$ 5,775.00
				ψ0,200	φ100	ψŪ	ψŪ	\$000	ψ¢	φυ	ψŪ	φũ	ψõ		φ 0,170.00
	Pre-Design Assessment (RFP Tasks 2 & 4)				0									4-6 wks	
2.1. 2.2.	Review PP&R provided facility information Develop/Distribute base plans and templates			2	8										
2.3.	Conduct Assessment Site Visits (1 visit + 1 follow-up)				4	4									
2.4.	A/E Team Coordination Meetings (Three, One, 1-hour each)			1	1										
2.5.	Building Assessment Report - Areas to remain (RFP Task 2) a. Structural Investigations (Tier 2 Evaluation of the existing Gym)	Core desig ABHT	ın team ·	+ PBS 16	24	80	24	2							
	b. Code research and analysis			8	8										
	c. Document existing conditions				8	8									
	d. Hazardous Materials Assessment- Confirm scope, see existing PPR reports e. Building Assessment Report			0	0 24										
2.6.		KPFF		4	24										
	a. Private Utility Locates for sitework														
	b. Site survey (Full park site property lines and trees)														
2.7.	Site Investigations & Assessment	ALL TEAN													
	 a. Site, zoning, and regulatory research and analysis b. Geotechnical exploration and report 	Vega, PAE PBS	, FFA												
	c. Stormwater Management Assessment (SWMM)	Vega													
	d. Tree Assessment Survey & Report	PTC/MR													
	e. Site Assessment Report														
2.8	Quality Assurance Review			4											
2.9	Revisions and Issue Electronic Draft Reports			2	8										
2.10.	Review with Owner and Track comments	FFA		2	4										
2.11	Incorporate Owner Comments & Issue Final Reports				4										
			Hours Rate Fee	39 \$210 \$8,190	93 \$165 \$15,345	\$150	24 \$125 \$3,000	2 \$90 \$180	\$100	\$100	\$100	\$100	0 \$100 \$0		\$ 40,515.00

4

Task 3 Pre-Design | Framework (RFP Task 3)

3.0. Meetings

Resilience/ Eco and High-Performance Goal setting workshops (Two 3-hour FFA/PAE/BW

a. meetings) b. LEED Owner's Project Requirements (OPR) Kick-off meeting

BW/PAE/FFA/MR

c. A/E coordination meetings (Four 1-hour each) Core design team

3.1 Building Performance Workshop Summary (includes resilience and sustainability SEE NPB Design Guide

a. Whole Building Energy Performance

PAE, FFA, BW

6 wks - overlaps with task 2

	b. Site and Irrigation	Vega/MR	10											
	c. Structural Engineering d. Building Enclosure/Envelope	ABHT FFA/MH/BW	16				4							
	e. Interior Systems – Construction Products and Finish Materials.	FFA/BW												
	f. Mechanical Engineering	PAE												
	 g. Lighting Design – Interior and Exterior h. Electrical Engineering 	PAE PAE												
	i. Quality Assurance Review	FAE	2											
	j. Draft Outline													
3.2	Building Performance Strategies a. Meeting with PP&R Operations - systems discussion	PAE/All team	2											
	 a. Meeting with PP&R Operations - systems discussion b. Facilities Management focus group - FIM requirements 	FFA/PAE/Praxis												
	c. High-Performance Building Plan Strategy options													
	d. Quality Assurance Review		2											
3.3	e. Draft Strategies LEED Owner's Project Requirements (OPR) Development													
3.3	a. OPR Follow-up Meetings													
	b. OPR Summary Draft													
3.4	Program Refinement													
	a. Tour similar facilities in the region with stakeholders (Two half day tours) b. Community Engagement - Values and Programming	FFA FFA/BW/MR												
	c. Focus Group Meetings (Spatial, MEP, & FF&E requirements)	FFA/PAE												
	d. Quality Assurance Review													
	e. Draft Summary													
3.5	Review with Owner and Track comments Incorporate Owner Comments & Issue Final Reports	FFA All team	2											
	incorporate Owner Comments & issue Final Reports	Hours	28	0	0	0	4	0	0	0	0	0		
		Rate	\$210	\$165	\$150	\$125	\$90	\$100	\$100	\$100	\$100	\$100		
		Fee	\$5,880	\$0	\$0	\$0	\$360	\$0	\$0	\$0	\$0	\$0	\$	6,240.00
Task	4 Schematic Design (RFP Tasks 5 & 6)												12 wks + 2 wks	owner review
4.0	Meetings													
	a. Owner-Architect meetings (bi-weekly)													
	 b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting 	Core design team	12	12										
	 d. Sustainable Procurement kick-off meeting and documentation 	BW												
4.1	Develop Three (3) Concept Options													
	a. Site and Building plans													
	 b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies 	FFA/PAE ALL	8											
	d. Cost estimates		0											
	e. Quality Assurance, revisions, and issue package		2											
4.2	<u>Design Charrette One</u> : Three design schemes and select preferred a. Electronic presentation and presentation boards	FFA, BW/MR prep												
	 b. Charette (4 hrs) 													
4.3	Develop Preferred Concept													
4.4	Discuss strategy for continued pool operation during construction													
4.5	(fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours)	FFA												
4.5	a. Electronic presentation and presentation boards	FFA												
	b. Charette (4 hrs)													
4.6	<u>Furniture Design</u> - Develop Layouts and Furniture Vision													
	 a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments 													
4.7	Performance Tracking Reports for Certification/Green Design Requirements	BW												
		DIAL												
	a. LEED & Green Building Policy Checklists	BW												
4.0	b. Energy Model for system selection (Utilizing Schematic 3D Model)	PAE												
	 b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent 	PAE												
4.8 4.9	 b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent <u>Pre-Application</u> with City of Portland a. Pre-Application package 	PAE AP led process AP/FFA/Vega/MR												
	b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agen! <u>Pre-Application</u> with City of Portland a. Pre-Application package b. Pre-application Conference	PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP												
4.9	 b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agen! <u>Pre-Application</u> with City of Portland a. Pre-Application package b. Pre-application Conference c. Pre-application notes response 	PAE AP led process AP/FFA/Vega/MR												
4.9	b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent <u>Pre-Application</u> with City of Portland a. Pre-Application package b. Pre-application Conference c. Pre-application notes response <u>100% Schematic Design Package</u> - Assume alternates are included	PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP	24	88	96	96	4							
4.9	 b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agen! <u>Pre-Application</u> with City of Portland a. Pre-Application package b. Pre-application Conference c. Pre-application notes response 	PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP	24	88 16	96	96	4							

 5.0. Meetings: a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions) b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour) A/E Revit model updates due bi-weekly (prior to coordination meeting) 5.1 MEP System Selection (RFP Task 7) PAE led process 5.1 MEP Systems Focus Group Meeting with PP&R b. Develop Energy Conservation Measures table Energy Life-Cycle Cost Analysis Life cycle cost energy savings evaluation / c. Energy Conservation Measures 	\$ 58,290.00
 5.0. Meetings: a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions) b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour) A/E Revit model updates due bi-weekly (prior to coordination meeting) 5.1 MEP System Selection (RFP Task 7) PAE led process 5.1 MEP Systems Focus Group Meeting with PP&R b. Develop Energy Conservation Measures table Energy Life-Cycle Cost Analysis Life cycle cost energy savings evaluation / c. Energy Conservation Measures 	
 5.0. Meetings: a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions) b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour) Core design team 9 9 A/E Revit model updates due bi-weekly (prior to coordination meeting) To A/E Revit model updates due bi-weekly (prior to coordination meeting) A/E Revit model updates due bi-weekly (prior to coordination meeting) To A/E Revit model updates due bi-weekly (prior to coordination meeting) MEP System Selection (RFP Task 7) a. MEP Systems Focus Group Meeting with PP&R b. Develop Energy Conservation Measures table Energy Life-Cycle Cost Analysis-Life cycle cost energy savings evaluation / c. Energy Conservation Measures 	+ 2 wks owner review
 c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour) Core design team 9 9 A/E Revit model updates due bi-weekly (prior to coordination meeting) 7 MEP System Selection (RFP Task 7) PAE led process a. MEP Systems Focus Group Meeting with PP&R b. Develop Energy Conservation Measures table Energy Life-Cycle Cost Analysis-Life-cycle cost energy savings evaluation / c. Energy Conservation Measures 	
 b. Develop Energy Conservation Measures table Energy Life-Cycle Cost Analysis Life-cycle cost energy savings evaluation /- c. Energy Conservation Measures 	
MEP systems Energy Life Cycle Cost Analysis / Energy conservation d. opportunities	
e. Energy Model update based on selected systems, LEED input f. MEP Systems Selection Package Draft Report g. Owner review and comment, A/E response	
 5.2 <u>Systems, Equipment, and Materials Review Meetings</u> (RFP Task 8.10) a. Building Exterior Materials Presentation and Owner Review Meeting b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting 	
Security, A/V, and Technology Systems Package and Owner Coordination c. Review Meeting d. Lighting and Energy Management Package and Owner Review Meeting	
e. Interior Finishes Presentation and Owner Review Meeting	
f. Track, respond, and incorporate owner comments for each meeting 5.3 50% Design Development Progress Package - Not priced - coordination only All team a. Drawings 16 50 60 4	
b. Outline Specifications 8 Attach system and material packages PAE Include draft envelope testing and commissioning requirements MH/PAE/BW	
 c. Outline of furniture specifications and proposed color boards d. Cost estimate in CSI format FFA RLB/team review 0 	
e. Updated Design & Construction Schedule f. Assemble package	
g. Quality Assurance Review 4	
5.4 Progress review meeting with the Owner's Project Manager FFA Owner review and comments. A/E track and provide response FFA	
5.5 Value Engineering, as required (RFP Task 8.8) 0 0	
 5.6 Land Use Review - Assumed Type III Review (RFP Task 6) a. Neighborhood meeting (Public Involvement Plan Presentation #2) 1. Notification and presentation materials for Neighborhood meetinc 	
 Neighborhood meeting Attendance list and meeting notes AP 	
b. Land Use Package AP	
1. Development, Draft Report, internal review All team 4 (Including support drawings, tree plan, reports, and materials board 4 2. Final Package & Submittal 4	
c. Public Hearing 5.7 Public Works Permit (PWP) Process Vega submitting	

	a. Submit PWP Concept package b. AHJ Package Review meeting													
5.8	100% Design Development Package (35% Construction Documents)													
	a. Drawings (RFP Task 8.11)		16	50	60	60	4							
	b. Specifications			4										
	c. Cost Estimate	RLB/team review	2											
	 Quality Assurance review and checklists 		4											
	e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)	All team	8											
5.9	Performance Tracking Report Update (RFP Task 8.12)													
	a. LEED & Green Building Policy Checklists													
	b. Energy Model update based on selected systems													
	c. Life-Cycle Cost Analysis Update													
5.10.	Plan Review Meeting with Owner's staff	FFA/PAE												
	 a. Track comments and provide A/E response 			8										
		Hours	63	145	120	131	8	0	0	0	0	0		
		Rate	\$210	\$165	\$150	\$125	\$90	\$100	\$100	\$100	\$100	\$100		
		Fee	\$13,230	\$23,925	\$18,000	\$16,375	\$720	\$0	\$0	\$0	\$0	\$0	\$	72,250.00
	Construction Documents (RFP Task 9)												18 weeks	
6.0.	Meetings													
	a. Owner-Architect Meeting													
	 b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly - 1 hour) 	Coro design to	9	9										
	A/E Revit model updates due bi-weekly (prior to coordination meeting	Core design team	9	9		9								
6.1	Public Works Permit (PWP) Process					9								
6.1	a. Submit PWP Design package		1	8		8								
	b. AHJ Package Review meeting		1	2		0								
6.2	75% CD Progress Package (RFP Task 9.1)			2										
0.2	a. Drawings		40	80	136	112	4							
	b. Specifications		40	4	150	112	4							
	c. Updated Performance Tracking Reports			-										
	LEED & Green Building Policy Checklists													
	Energy Model based on selected systems (PAE confirm timing)													
	Life-Cycle Cost Analysis													
	d. Preliminary Calculations													
	e. Cost Estimate	RLB/team review	2	2										
	f. Design & Construction Schedule													
	g. Final Update finishes board (interior and exterior)													
	h. Issue Tracking log													
	i. Quality Assurance - copy of redline set		8			8								
6.3	Plan Review Meeting with Owner Team (RFP Task 9.1.18.2)	FFA												
	a. Track, respond, and incorporate owner comments			8		8								
6.4	Systems, Equipment, and Materials Update (RFP Task 8.10)													
	a. Building Exterior Materials Presentation and Owner Review Meeting													
	 Plumbing Fixture Package (cutsheets) and Owner Review Meeting 													
	Security, A/V, and Technology Systems Package and Owner Review													
	c. Meeting													
	d. Lighting and Energy Management Package and Owner Review Meeting													
	e. Interior Finishes Presentation and Owner Review Meeting													
	f. Track, respond, and incorporate owner comments for each meeting													
6.5	95% CD Progress Package (RFP Task 9.2)													
	a. Drawings		16	32	68	44								
	b. Specifications (incorporating LEED lists and list of O&M requirements)			4										
	c. Full Design Calculations		4	12	12									
	d. Quality Assurance review		8	•										
67	e. List identifying anticipated long lead items (9.2.5)			2										
6.7	Plan Review Meeting with Owner Team (9.2.7.2)	FFA/PAE		~		0								
6.0	a. Track, respond, and incorporate owner comments Public Works Permit (PWP) Process			8		8								
6.8	a. Submit PWP Final package													
	 a. Submit PWP Final package b. AHJ Package Review meeting 													
6.9	100% Construction Documents/ Permit Submittal to PP&R PM	All Team												
0.9	a. Stamped Drawings		4	24	24	24								
	b. Stamped Specifications		4	24	24	27								
	D. Clamped openindulono			4										

6.10.	Stamped Final Design Calculations (Includes incorporating additional calcs c. and preparing final package for permitting) d. Updated Cost Estimate e. Permit Application Forms and support documentation Owner review and approval	RLB/team rev	/iew	1	4	4									
		F	ours Rate Fee	94 \$210 \$19,740	203 \$165 \$33,495	244 \$150 \$36,600	221 \$125 \$27,625	4 \$90 \$360	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$	117,820.00
Task 7	Permitting and Bidding (RFP Task 10)														
7.0. 7.1	Owner-Architect Update Meetings (monthly) <u>Permitting</u> a. Submit for Permit														
	b. Permit check sheet responses and tracking			16	24	40	16								
7.2	Bidding a. Prepare Bid Set Documents				16		16								
	b. Pre-Bid Conference c. Bid Phase A/E Services				4		10								
7.3 7.4	Value-Engineering and reissuance (if all bids exceed cost estimate by 20%) Public Works Permit (PWP) Process a. Submit Final Vellum package			0	0	0	0								
7.5	LEED Design Phase Review/Complete LEED Documentation														
		F	ours Rate Fee	16 \$210 \$3,360	44 \$165 \$7,260	40 \$150 \$6,000	32 \$125 \$4,000	0 \$90 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$	20,620.00
Task 8	Construction Administration (RFP Task 11)												~	-12-18 mo.	
8.0.	Meetings a. Pre-Construction Meetings														
	a. Fre-construction Meetings 1. Contractor Kick-off Pre-construction Meeting 2. LEED Pre-construction Meeting 3. Specialty and System Pre-construction Meetings b. Owner-Architect-Contractor Meetings: Weekly Site Visits and Observation Reports - four times per month min. 2x per				2 2 4										
	 c. month min. (by A/E team - not each consultant) d. Client/Vendor Furniture coordination meetings (five meetings); e. LEED update meetings (every 4-6 weeks 9 meetings) 				56										
8.1	Construction Administration Services (RFP Tasks 11.4-11.7)														
	a. Submittals b. RFIs/ASI's/PCOs			8 16	60 96	60 96									
	c. Certification of Payment Applications														
	 d. Changes, CO/PCO/CCD for owner review e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.) 														
	Envelope testing	MH/FFA													
	a. Mock up Reviews b. Window Testing														
8.3	Furnishing Installation Punch List Observations (review of Vendors punch list and furnishings outside of vendors purview)	FFA													
8.4	Testing and Balancing (Commissioning agent coordination in Task 9) a. Attend Equipment or System Start up/Testing														
8.5	 b. Testing and balancing observations and Test Data Reviews <u>Substantial Completion Process</u> a. Review General Contractor issued substantial completion punch list 	All Team			8										
	a. Review General Contractor issued substantial completion punch list b. A/E Punch List Observations and Reports c. Back punch walk of contractor completed punch list				8 8 8										
	d. Issue Certificate of Substantial Completion				2										
8.6	Certificate of Occupancy				a 4-										
		F	ours Rate Fee	24 \$210 \$5,040	246 \$165 \$40,590	156 \$150 \$23,400	0 \$125 \$0	0 \$90 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$	69,030.00

Task 9 Commissioning and LEED Submission(RFP Task 13)

9.0. A/E coordination of owner provided Commissioning and Testing

 a. Attend commissioning meetings (minimum of five meetings)

- b. A/E coordination with owner provided Commissioning Agent
 c. Testing and balancing observations and Test Data Reviews see 8.4 b.
- 9.1 LEED Submission a. LEED Construction-Phase and Final Certification Review
 - b. LEED Submission

		Hours Rate Fee	0 \$210 \$0	0 \$165 \$0	0 \$150 \$0	0 \$125 \$0	0 \$90 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$0	\$ -
Task 1	0 Project Closeout (RFP Task 11 & 14)												1 mo.	
10.1	Asset Management Plan - Review contractor and Praxis deliverables	Praxis												
	a. Review Plan and evaluate maintenance and life-cycle informatior	PAE/FFA/MH												
	 B. Review Facility Information Model (FIM) 	PAE/FFA/MH												
10.2	Final Completion Observations (RFP 14.6)	ALL TEAM												
	a. Two (2) comprehensive punch list closeout observations and updates		8	8										
10.3	Furnishing Final Completion Observation and Closeout													
10.4	Project Closeout Documents (RFP 14.7)													
	a. Record Documents from contractor as-built mark-ups (RFP 14.1)	ALL TEAM												
	Update Revit Models			8		16								
	Reproducible Record Drawings (PDF)			4		8								
	 b. Operations & Maintenance Manual and closeout document reviews c. Close out coordination 	ALL TEAM FFA		2										
10 F		FFA												
10.5	Issue Final Payment after owner final acceptance													
		Hours	8	22	0	24	0	0	0	0	0	0		
		Rate	\$210	\$165	\$150	\$125	\$90	\$100	\$100	\$100	\$100	\$100		
		Fee	\$1,680	\$3,630	\$0	\$3,000	\$0	\$0	\$0	\$0	\$0	\$0 i	4####	\$ 8,310.00
											ΤΟΤΑ	L FEES		\$ 398,850.00
														,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
EX	Expenses													
	(List expenses here and manually add amount to end of row)													\$ 1,500.00

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team Updated 4.9.2021

Update	14.9.2021														
				PAE											
			N	/IEP + Sus	anability										
													5		
								-		ad	L-	£	Project Coordinator	_	
						ad	ğ	FP Lead	b	BAM Lead	Designer	BIM Tech	di ct	Duration	
				< ¹	ECK	Lead	P Lead	2	Lead	Σ	ŝŝ	Σ	Project Coordin	Ira	
			Role	f ì	Ц	Σ	۵_	臣	ш	A B	ď	B	ĔŬ	đ	Subtotals
			Rate	\$255	\$255	\$215	\$185	\$185	\$185	\$185	\$145	\$120	\$115		
Took 1	Project Initiation														
1.1	Detailed Work Plan, Design Program, & Fee (In progress)	FFA													
1.1	a. Scope of Work	All Team		4											
	b. Schedule	FFA		-											
	c. Detailed Workplan with Fee	All Team		4											
1.2	Client Kick-off Meeting (PP&R + FFA)	FFA		-											
1.2	A/E Team Kick-off Meeting (1-hour meeting)	All Team		1		1									
1.5				-							_	_	_		
			lours	9	0	1	0		0	0	0	0	0		
			Rate	\$255	\$255	\$215	\$185		\$185		\$145		\$115	•	0 540 00
			Fee	\$2,295	\$0	\$215	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	2,510.00
Task 2	Pre-Design Assessment (RFP Tasks 2 & 4)													4-6 wks	
	Review PP&R provided facility information													4 0 1110	
	Develop/Distribute base plans and templates														
2.3.	Conduct Assessment Site Visits (1 visit + 1 follow-up)				2	2	2	0	2						
	A/E Team Coordination Meetings (Three, One, 1-hour each)			1	0	1	1		1						
	Building Assessment Report - Areas to remain (RFP Task 2)	Core design	team +	- PBS											
	a. Structural Investigations	ABHT													
	b. Code research and analysis														
	c. Document existing conditions														
	L Herenders Materials Assessment Confirm source of states DDD assesses														
	d. Hazardous Materials Assessment- Confirm scope, see existing PPR reports			•		•							•		
	e. Building Assessment Report	KDEE		2	2	2	2	2	2				2		
2.6.	Site Survey (RFP Task 4) a. Private Utility Locates for sitework	KPFF													
	 b. Site survey (Full park site property lines and trees) 														
2.7	Site Investigations & Assessment	ALL TEAM													
2.7.	a. Site, zoning, and regulatory research and analysis	Vega, PAE, I													
	 b. Geotechnical exploration and report 	PBS	FFA												
	c. Stormwater Management Assessment (SWMM)	Vega													
	d. Tree Assessment Survey & Report	PTC/MR													
	e. Site Assessment Report														
2.8	Quality Assurance Review														
2.9	Revisions and Issue Electronic Draft Reports			1	1	1	1	1	1				1		
2.10.	Review with Owner and Track comments	FFA		-				-							
2.11	Incorporate Owner Comments & Issue Final Reports			1	1	1	1	1	1				1		
	•	F	lours	5	6	7	7	4	7	0	0	0	4		
			Rate	\$255	\$255	\$215	\$185						\$115		
			Fee	\$1,275	\$1,530	\$1,505	\$1,295			\$0	\$0	\$0	\$460	\$	8,100.00
Task 2	Pre-Design Framework (RFP Task 3)													6 wks - ove	erlaps with task 2
	Meetings													0 WK3 - 0V6	napo wili laon Z
	Resilience/ Eco and High-Performance Goal setting workshops (Two 3-hour														
	a. meetings)	FFA/PAE/BV	V	6		6	6		6	10			2		
	b. LEED Owner's Project Requirements (OPR) Kick-off meeting	BW/PAE/FF/		1	0	1	1		1	1					
	c. A/E coordination meetings (Four 1-hour each)	Core design	team	2		4	4	0	4	2					
~ 4	Duilding Defension of Westerland Commences (includes an illing of and contain shifts	OFF NOD D													

3.1 Building Performance Workshop Summary (includes resilience and sustainability SEE NPB Design Guide

	a. Whole Building Energy Performance (Establish goals. No energy modeling)b. Site and Irrigation	Vega/MR	1	0	1	1		1	4			2		
	c. Structural Engineering	ABHT												
	 d. Building Enclosure/Envelope e. Interior Systems – Construction Products and Finish Materials. 	FFA/MH/BW FFA/BW												
	f. Mechanical Engineering	PAE			2			0						
	g. Lighting Design – Interior and Exterior	PAE						1						
	h. Electrical Engineering	PAE						2						
	i. Quality Assurance Review													
	j. Draft Outline		1		1	1		1	1			2		
3.2	Building Performance Strategies a. Meeting with PP&R Operations - systems discussion	PAE/All team	2		2	2		2						
	 b. Facilities Management focus group - FIM requirements 	FFA/PAE/Praxis	Z	1	1	1	1	1						
	c. High-Performance Building Plan Strategy options			1	1	1		1	4			1		
	d. Quality Assurance Review													
	e. Draft Strategies													
3.3	LEED Owner's Project Requirements (OPR) Development		4			4								
	a. OPR Follow-up Meetings b. OPR Summary Draft		1		1	1	1	1	1 1					
34	Program Refinement				1	1	1		1					
0.1	a. Tour similar facilities in the region with stakeholders (Two half day tours	FFA												
	b. Community Engagement - Values and Programming	FFA/BW/MR												
	 Focus Group Meetings (Spatial, MEP, & FF&E requirements) 	FFA/PAE			1	1	1	1						
	d. Quality Assurance Review													
25	e. Draft Summary	FFA												
3.5	Review with Owner and Track comments Incorporate Owner Comments & Issue Final Reports	All team	1	1	1	1	1	1				2		
	incorporate Owner Comments & Issue Final Reports								04	0	0	9		
		Hours Rate		3 \$255	23 \$215	21 \$185	5 \$185	24 \$185	24 \$185	0 \$145	0 \$120	9 \$115		
		Fee		\$765	\$4,945	\$3,885	\$925	\$4,440	\$4,440	\$145	\$120	\$1,035	\$	24,260.00
Tack /	Schematic Design (RFP Tasks 5 & 6)											1	$12 \text{ w/s} \pm 2 \text{ w/s}$	s owner review
4.0														s owner review
	Meeunas													
	Meetings a. Owner-Architect meetings (bi-weekly)													
	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) 	Core design team	regularly, (6	14	14	14	14						
	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting 		regularly, (1	6	14 1	14 1	14	14 1	1					
	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation 	Core design team		6			14		1					
4.1	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options 			6			14		1					
4.1	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans 	BW		6			14		·					
4.1	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool 	BW FFA/PAE			1	1	14	1	4			1		
4.1	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies 	BW		6			14		·			1		
4.1	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool 	BW FFA/PAE			1	1		1	4			1		
	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred 	BW FFA/PAE	1		1 1 1	1	1	1 1 1	4			-		
	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards 	BW FFA/PAE ALL	1 p		1 1 1	1	1	1 1 1	4 4 1			-		
4.2	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) 	BW FFA/PAE ALL	1		1 1 1	1	1	1 1 1	4			-		
4.2 4.3	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) 	BW FFA/PAE ALL	1 p	1	1 1 1 1	1 1 1 1	1 1	1 1 1 1	4 4 1			-		
4.2	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charett (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction 	BW FFA/PAE ALL	1 p		1 1 1	1	1	1 1 1	4 4 1			-		
4.2 4.3 4.4	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) 	BW FFA/PAE ALL FFA, BW/MR pre	1 p	1	1 1 1 1	1 1 1 1	1 1	1 1 1 1	4 4 1			-		
4.2 4.3 4.4	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) 	BW FFA/PAE ALL	1 p	1	1 1 1 1	1 1 1 1	1 1	1 1 1 1	4 4 1			-		
4.2 4.3 4.4	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) 	BW FFA/PAE ALL FFA, BW/MR pre	1 p	1	1 1 1 1	1 1 1 1	1 1	1 1 1 1	4 4 1			-		
4.2 4.3 4.4 4.5	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) 	BW FFA/PAE ALL FFA, BW/MR pre	1 p 4	1	1 1 1 1	1 1 1 1	1 1	1 1 1 1	4 4 1 4			-		
4.2 4.3 4.4 4.5	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Desting Charrette (4 hrs) Desting Charrette (4 hrs) Electronic presentation and presentation boards b. Charette (4 hrs) Electonic presentation and presentation boards b. Charette (4 hrs) Electonic presentation and presentation boards b. Charette (4 hrs) Euclid Arss Euclid Arss<	BW FFA/PAE ALL FFA, BW/MR pre	1 p 4	1	1 1 1 1	1 1 1 1	1 1	1 1 1 1	4 4 1 4			-		
4.2 4.3 4.4 4.5 4.6	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Charette (4 hrs) 	BW FFA/PAE ALL FFA, BW/MR pre	1 p 4	1	1 1 1 1	1 1 1 1	1 1	1 1 1 1	4 4 1 4			-		
4.2 4.3 4.4 4.5 4.6	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentatior Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Charette Visioning Meeting with client and track comments 	BW FFA/PAE ALL FFA, BW/MR pre	1 p 4	1	1 1 1 1	1 1 1 1	1 1	1 1 1 1	4 4 1 4			-		
4.2 4.3 4.4 4.5 4.6	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electonic presentation and presentation boards b. Charette (4 hrs) Develop Teferred option (4 hours) a. Electonic presentation and presentation boards b. Charette (4 hrs) Design Charrette Two: Preferred option (4 hours) a. Electonic presentation and presentation boards b. Charette (4 hrs) Design Charrette Two: Preferred option (4 hours) a. Electonic presentation and presentation boards b. Charette (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists 	BW FFA/PAE ALL FFA, BW/MR pre	1 D 4 4	2	1 1 1 2	1 1 1 1	1 1	1 1 1 1	441144			1		
4.2 4.3 4.4 4.5 4.6 4.7	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electonic presentation and presentation boards b. Charette (4 hrs) Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Design, Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) 	BW FFA/PAE ALL FFA, BW/MR pre	1 p 4	1	1 1 1 2 2	1 1 1 2	1 1	1 1 1 2	4 4 1 4 4 2 40			-		
4.2 4.3 4.4 4.5 4.6 4.7 4.8	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent 	BW FFA/PAE FFA, BW/MR pre FFA	1 0 4 4	2	1 1 1 2	1 1 1 1	1 1	1 1 1 1	441144			1		
4.2 4.3 4.4 4.5 4.6 4.7	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy or continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for PP&R to select Commissioning Agent Pre-Application With City of Portland 	BW FFA/PAE ALL FFA, BW/MR pre FFA BW BW PAE AP led process	1 1 4 4 2	2	1 1 1 2 2	1 1 1 2	1 1	1 1 1 2	4 4 1 4 4 2 40			1		
4.2 4.3 4.4 4.5 4.6 4.7 4.8	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent 	BW FFA/PAE ALL FFA, BW/MR pre FFA FFA BW BW PAE AP led process AP/FFA/Vega/MF	1 1 4 4 2	2	1 1 1 2 2	1 1 1 2	1 1	1 1 1 2	4 4 1 4 4 2 40			1		
4.2 4.3 4.4 4.5 4.6 4.7 4.8	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentatior Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electonic presentation and presentation boards b. Charette (4 hrs) Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Design. Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent <u>Pre-Application</u> with City of Portland a. Pre-Application package 	BW FFA/PAE ALL FFA, BW/MR pre FFA BW BW PAE AP led process	1 1 4 4 2	2	1 1 1 2 2	1 1 1 2	1 1	1 1 1 2	4 4 1 4 4 2 40			1		

4.11 4.12	 a. Drawings b. Outline Specification & Narratives Include preliminary LEED Scorecard and high performances measures c. Cost Estimate d. Design and Construction Schedule e. Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report Present SD package to Owner's staff Plan Review Meeting with Owner's staff 	RLB/team revi		4 8 1	4 4 2 2 2 2	4 2 2 2	4 4 2 2 2	2 4 2 2 2 2 2	2	8	4	2		
4.13	 a. Track comments and provide A/E response Community Presentation (Public Involvement Plan Presentation #1) a. Prepare renderings and presentation materials b. Community input summary report 	ALL FFA/MR FFA Ho	urs 14	22	1	1 38	1 31	1 36	65	8	4	1		
			ate \$255 ⁻ ee \$3,570	\$255 \$5,610	\$215 \$8,600	\$185 \$7,030	\$185 \$5,735	\$185 \$6,660	\$185	\$145 \$1,160	\$120 \$480	\$115 \$920	\$	51,790.00
Task 5	Design Development (35% CDs) (RFP Tasks 6, 7, & 8)												14 wks + 2 wks	s owner review
5.0.	Meetings: a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions)													
	 b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour A/E Revit model updates due bi-weekly (prior to coordination meeting) 	Core design te	am regularly, o	4	9	9	9	9			8			
5.1	MEP System Selection (RFP Task 7)	PAE led proce	SS											
	 a. MEP Systems Focus Group Meeting with PP&R b. Develop Energy Conservation Measures table Energy Life-Cycle Cost Analysis Life cycle cost energy savings evaluation / 			1	2 2	2 0	2	2 1	4			1		
	c. Energy Conservation Measures MEP systems Energy Life-Cycle Cost Analysis / Energy conservation d. opportunities								26 8			2		
	 e. Energy Model update based on selected systems, LEED input f. MEP Systems Selection Package Draft Report g. Owner review and comment, A/E response 		1	1	2	2	2	2	24 6 1			2		
5.2	 Systems, Equipment, and Materials Review Meetings (RFP Task 8.10) a. Building Exterior Materials Presentation and Owner Review Meeting b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting Security, A/V, and Technology Systems Package and Owner Coordination 					4						1		
	 c. Review Meeting d. Lighting and Energy Management Package and Owner Review Meeting e. Interior Finishes Presentation and Owner Review Meeting 				2			2				1		
	f. Track, respond, and incorporate owner comments for each meeting				1	1		1				1		
5.3	50% Design Development Progress Package - Not priced - coordination only a. Drawings	All team	1	4	12	12	12	8	1	16	8			
	 b. Outline Specifications Attach system and material packages Include draft envelope testing and commissioning requirements 	PAE MH/PAE/BW	·	-	8	8	8	4 1	1	10	0	4 1		
	c. Outline of furniture specifications and proposed color boards	FFA												
	d. Cost estimate in CSI format e. Updated Design & Construction Schedule f. Assemble package	RLB/team revi	€₩ 0		0	0	0	0				0		
5.4	 g. Quality Assurance Review Progress review meeting with the Owner's Project Manager 	FFA	1		1	1	1	1						
5.4	Owner review and comments. A/E track and provide response		1	2	2	2	2	2		8	8	2		
5.5 5.6	Value Engineering, as required (RFP Task 8.8) Land Use Review - Assumed Type III Review (RFP Task 6) a. Neighborhood meeting (Public Involvement Plan Presentation #2)	6-12 months	0		0	0	0	0	0			0		
	 Notification and presentation materials for Neighborhood meeting Neighborhood meeting Attendance list and meeting notes 	FFA FFA/AP/MR AP												
	b. Land Use Package 1. Development, Draft Report, internal review (Including support drawings, tree plan, reports, and materials board) 2. Final Package & Submittal	AP All team												

F 7	c. Public Hearing							0							
5.7	Public Works Permit (PWP) Process a. Submit PWP Concept package	Vega submitting						2							
	b. AHJ Package Review meeting														
5.8	100% Design Development Package (35% Construction Documents)														
	a. Drawings (RFP Task 8.11)			4	8	8	8	8	0	32	12				
	b. Specifications			1	4	4	4	4	0			2			
	c. Cost Estimate	RLB/team review			1	1	1	1							
	 d. Quality Assurance review and checklists e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab) 	All team			1	1	1	1							
5.9	Performance Tracking Report Update (RFP Task 8.12)	All lealli			1	1	1	1							
0.0	a. LEED & Green Building Policy Checklists				1	1		1	1						
	b. Energy Model update based on selected systems		1						2						
	c. Life-Cycle Cost Analysis Update		1						8			1			
5.10.	Plan Review Meeting with Owner's staff	FFA/PAE		•				•							
	a. Track comments and provide A/E response		_	2	2	2	2	2		4		1			
		Hours Rate	5 \$255	19 \$255	62	62 \$185	54 \$185	54 \$185	82 \$185	60	36 \$120	20 \$115			
		Fee	\$255 \$1,275		\$215 \$13,330	\$165 \$11,470	\$9,990	\$165	\$165 \$15,170	\$145 \$8,700	\$120 \$4,320	\$2,300	\$	81,390.00	
					,									- ,	
	Construction Documents (RFP Task 9) Meetings												18 weeks		
0.0.	a. Owner-Architect Meeting														
	 b. Client/Vendor Furniture coordination meetings (five meetings) 														
	c. A/E team coordination meeting (bi-weekly - 1 hour)	Core design team i	egularly, (3	9	9	9	9		20					
	A/E Revit model updates due bi-weekly (prior to coordination meeting										9				
6.1	Public Works Permit (PWP) Process							0							
	a. Submit PWP Design package b. AHJ Package Review meeting							8 2							
6.2	75% CD Progress Package (RFP Task 9.1)							2							
	a. Drawings				24	16	16	8		36	24				
	b. Specifications				8	8	8	8				4			
	c. Updated Performance Tracking Reports														
	LEED & Green Building Policy Checklists Energy Model based on selected systems (PAE confirm timing)				1	1		1	1 46						
	Life-Cycle Cost Analysis								40						
	d. Preliminary Calculations														
	e. Cost Estimate	RLB/team review	1		1	1	1	1				1			
	f. Design & Construction Schedule														
	 g. Final Update finishes board (interior and exterior) h. Issue Tracking log 														
	i. Quality Assurance - copy of redline set														
6.3	Plan Review Meeting with Owner Team (RFP Task 9.1.18.2)	FFA			1	1	1	1							
	a. Track, respond, and incorporate owner comments				4	4	4	2			8	2			
6.4	Systems, Equipment, and Materials Update (RFP Task 8.10)														
	a. Building Exterior Materials Presentation and Owner Review Meeting b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting					0				0		0			
	Security, A/V, and Technology Systems Package and Owner Review					0				0		0			
	c. Meeting														
	d. Lighting and Energy Management Package and Owner Review Meeting							1				1			
	e. Interior Finishes Presentation and Owner Review Meeting														
6.5	f. Track, respond, and incorporate owner comments for each meeting <u>95% CD Progress Package</u> (RFP Task 9.2)					1		1				1			
0.0	a. Drawings				24	16	16	8		34	24				
	 b. Specifications (incorporating LEED lists and list of O&M requirements) 				4	4	4	4		04	- -1	2			
	c. Full Design Calculations				4	4	4	4							
	d. Quality Assurance review						_								
67	e. List identifying anticipated long lead items (9.2.5)	FFA/PAE			1	1	0	1							
6.7	Plan Review Meeting with Owner Team (9.2.7.2) a. Track, respond, and incorporate owner comments	FFA/PAE			1	1 4	1 4	1		16	10				
6.8	Public Works Permit (PWP) Process				4	4	4	2		10	10				
-	a. Submit PWP Final package														
_	b. AHJ Package Review meeting														
6.9	100% Construction Documents/ Permit Submittal to PP&R PM	All Team		0		40	40	~			~				
	a. Stamped Drawings			8	24	12	12	8		34	24				

6.10.	 b. Stamped Specifications c. Stamped Final Design Calculations d. Updated Cost Estimate e. Permit Application Forms and support documentation Owner review and approval 	RLB/team	review Hours Rate	1 2 \$255	2 2 2 17 \$255	4 1 1 120 \$215	4 4 1 93 \$185	4 4 1 1 90 \$185	4 2 1 1 78 \$185	47 \$185	16 156 \$145	99 \$120	2 1 1 \$15 \$115		
			Fee	\$510	\$4,335	\$25,800	\$17,205	\$16,650	\$14,430	\$8,695	\$22,620	\$11,880	\$1,725	\$	123,850.00
Task 7	Permitting and Bidding (RFP Task 10)														
7.0.	Owner-Architect Update Meetings (monthly)														
7.1	Permitting a. Submit for Permit														
	b. Permit check sheet responses and tracking				2	1	1	1	1						
7.2	Bidding														
	a. Prepare Bid Set Documents														
	b. Pre-Bid Conference c. Bid Phase A/E Services			1	1	2	2	2	2				2		
7.3	Value-Engineering and reissuance (if all bids exceed cost estimate by 20%					2	2	2	2				2		
7.4	Public Works Permit (PWP) Process														
	a. Submit Final Vellum package														
7.5	LEED Design Phase Review/Complete LEED Documentation												_		
			Hours Rate	1 \$255	3 \$255	3 \$215	3 \$185	3 \$185	3 \$185	0 \$185	0 \$145	0 \$120	2 \$115		
			Fee	\$255 \$255	\$255 \$765	\$645	\$555	\$555	\$555	\$105 \$0	\$145	\$120 \$0	\$230	\$	3,560.00
Task 8 8.0.	Construction Administration (RFP Task 11) Meetings													~12-18 mo.	
0.0.	a. Pre-Construction Meetings														
	1. Contractor Kick-off Pre-construction Meeting			1											
	2. LEED Pre-construction Meeting									1					
	 Specialty and System Pre-construction Meetings Owner-Architect-Contractor Meetings: Weekly 			1											
	Site Visits and Observation Reports - four times per month min. 2x per														
	c. month min. (by A/E team - not each consultant)					4	4	4	4		35		4		
	 d. Client/Vendor Furniture coordination meetings (five meetings) e. LEED update meetings (every 4-6 weeks 9 meetings) 			3						12					
8.1				3						12					
0.1	a. Submittals					8	8	4	4		30		12		
	b. RFIs/ASI's/PCOs					8	8	12	8		30		8		
	c. Certification of Payment Applications d. Changes, CO/PCO/CCD for owner review					4	4 8	4 8	4		24	12	2		
	e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.)					0	0	0	4		24	12	4		
	Envelope testing	MH/FFA													
	a. Mock up Reviews														
83	 b. Window Testing Furnishing Installation Punch List Observations 	FFA													
0.0	(review of Vendors punch list and furnishings outside of vendors purview)														
8.4	Testing and Balancing (Commissioning agent coordination in Task 9														
	a. Attend Equipment or System Start up/Testing					0	0		0		00				
8.5	 b. Testing and balancing observations and Test Data Reviews Substantial Completion Process 	All Team				2	2 2		2		20 12				
0.0	a. Review General Contractor issued substantial completion punch list	, , ouri				1	1	1	1		12				
	b. A/E Punch List Observations and Reports					2	2	2	2				1		
	 c. Back punch walk of contractor completed punch list d. Issue Certificate of Substantial Completion 					2	2	2	2				1		
8.6	Certificate of Occupancy														
			Hours	5	0	41	41	37	31	13	151	12	32		
			Rate	\$255	\$255	\$215	\$185	\$185	\$185	\$185	\$145	\$120	\$115		
			Fee	\$1,275	\$0	\$8,815	\$7,585	\$6,845	\$5,735	\$2,405	\$21,895	\$1,440	\$3,680	\$	59,675.00

Task 9 Commissioning and LEED Submission(RFP Task 13)

9.0. A/E coordination of owner provided Commissioning and Testing

 a. Attend commissioning meetings (minimum of five meetings)

9.1	 b. A/E coordination with owner provided Commissioning Agen! c. Testing and balancing observations and Test Data Reviews see 8.4 b. LEED Submission a. LEED Construction-Phase and Final Certification Review b. LEED Submission 		1 0		4 0	4 0		4		12		0		
		Hours Rate Fee	1 \$255 \$255	0 \$255 \$0	4 \$215 \$860	4 \$185 \$740	0 \$185 \$0	4 \$185 \$740	0 \$185 \$0	12 \$145 \$1,740	0 \$120 \$0	0 \$115 \$0	\$	4,335.00
ask 10	0 Project Closeout (RFP Task 11 & 14)											1 r	mo.	
	Asset Management Plan - Review contractor and Praxis deliverables	Praxis												
	a. Review Plan and evaluate maintenance and life-cycle informatior	PAE/FFA/MH			1	1	1	1		6		1		
	 B. Review Facility Information Model (FIM) 	PAE/FFA/MH			1	1	1	1		6		1		
10.2	Final Completion Observations (RFP 14.6)	ALL TEAM												
40.0	a. Two (2) comprehensive punch list closeout observations and updates		1		1	1	1	1		8		2		
10.3 10.4	Furnishing Final Completion Observation and Closeout Project Closeout Documents (RFP 14.7)		1											
10.4	a. Record Documents from contractor as-built mark-ups (RFP 14.1)	ALL TEAM												
	Update Revit Models				2	2	2	2		12	12			
	Reproducible Record Drawings (PDF)				-	-	-	-			4			
	b. Operations & Maintenance Manual and closeout document reviews c. Close out coordination	ALL TEAM FFA		1	0	0	0	1		6		1		
10.5	Issue Final Payment after owner final acceptance	FFA												
		Hours Rate Fee	2 \$255 \$510	1 \$255 \$255	5 \$215 \$1,075	5 \$185 \$925	5 \$185 \$925	6 \$185 \$1,110	0 \$185 \$0	38 \$145 \$5,510	16 \$120 \$1,920	5 \$115 \$575	\$	12,805.00
											τοτΑ	AL FEES	\$	372,275.00
EX	Expenses													
	Total Expenses												\$	3,000.00
														-,

Total \

\$ 375,275.00

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team Updated 4.9.2021

Updated	4.9.2021															
				AE												
			Т	echnology												
									5							
							5	5	Project Coordinator					~		
						_	Designer	BIM Tech	din					Duration		
			Role	E (ECK	Lead	esi	Σ		Kole	Role	Role	Role	nra	- -	
															5	ubtotals
			Rate	\$255	\$215	\$185	\$145	\$120	\$115	\$0	\$0	\$0	\$0			
Task 1	Project Initiation															
1.1	Detailed Work Plan, Design Program, & Fee (In progress)	FFA														
	a. Scope of Work	All Team														
	b. Schedule	FFA														
	c. Detailed Workplan with Fee	All Team														
	Client Kick-off Meeting (PP&R + FFA)	FFA														
1.3	A/E Team Kick-off Meeting (1-hour meeting)	All Team				1										
			Hours	0	0	1	0	0	0	0		0	0	0		
			Rate	\$255	\$215	\$185	\$145	\$120		\$0		\$0	\$0	\$0		
			Fee	\$0	\$0	\$185	\$0	\$0	\$0	\$0	9	\$0	\$0	\$0	\$	185.00
Cook O	Pre-Design Assessment (RFP Tasks 2 & 4)													4.6		
	Review PP&R provided facility information					2								4-6 wk	.S	
	Develop/Distribute base plans and templates					2										
	Conduct Assessment Site Visits (1 visit + 1 follow-up)					2										
	A/E Team Coordination Meetings (Three, One, 1-hour each)					3										
	Building Assessment Report - Areas to remain (RFP Task 2)	Core desig	ın team +	PBS		Ũ										
	a. Structural Investigations	ABHT														
	b. Code research and analysis															
	c. Document existing conditions					2										
	d. Hazardous Materials Assessment- Confirm scope, see existing PPR reports															
	e. Building Assessment Report					2			1							
26	Site Survey (RFP Task 4)	KPFF				2										
2.0.	a. Private Utility Locates for sitework															
	 b. Site survey (Full park site property lines and trees) 															
2.7.	Site Investigations & Assessment	ALL TEAM														
	a. Site, zoning, and regulatory research and analysis	Vega, PAE	, FFA													
	b. Geotechnical exploration and report	PBS														
	c. Stormwater Management Assessment (SWMM)	Vega														
	d. Tree Assessment Survey & Report	PTC/MR														
	e. Site Assessment Report															
	Quality Assurance Review															
2.9	Revisions and Issue Electronic Draft Reports	FFA				1										
	Review with Owner and Track comments Incorporate Owner Comments & Issue Final Reports	r f A				1			1							
2.11	incorporate owner comments a issue i mariteports		11	-	-	-	-	-		-		•	•			
			Hours Rate	0 \$255	0 \$215	13 \$185	0 \$145	0 \$120		0 \$0		0 \$0	0 \$0	0 \$0		
			Fee	ֆ∠55 \$0	\$215 \$0	\$185 \$2,405	\$145 \$0	\$120 \$0		\$0 \$0		\$0 \$0	\$0 \$0	\$0 \$0	\$	2,635.00
				ψŪ	ψŪ	Ψ2,-100	ψŪ	ψΟ	Ψ200	ψŪ		*~	ΨŪ	ΨŬ	Ψ	2,000.00
														2		
	Pre-Design Framework (RFP Task 3) Meetings													6 wks	 overlaps 	with task 2
0.0.	Resilience/ Eco and High-Performance Goal setting workshops (Two 3-hour															
	a. meetings)	FFA/PAE/	ЗW													
	 b. LEED Owner's Project Requirements (OPR) Kick-off meeting 	BW/PAE/F				1										
	c. A/E coordination meetings (Four 1-hour each)	Core desig				4										
31	Building Performance Workshop Summary (includes resilience and sustainability			uide		-										

3.1 Building Performance Workshop Summary (includes resilience and sustainability SEE NPB Design Guide a. Whole Building Energy Performance PAE, FFA, BW

12.12.2020 DRAFT

	b. Site and Irrigation	Vega/MR													
	c. Structural Engineering	ABHT													
	d. Building Enclosure/Envelope	FFA/MH/BV	N												
	 e. Interior Systems – Construction Products and Finish Materials. 	FFA/BW													
	f. Mechanical Engineering	PAE													
	 Lighting Design – Interior and Exterior 	PAE													
	h. Electrical Engineering	PAE													
	i. Quality Assurance Review														
	j. Draft Outline														
3.2	Building Performance Strategies	PAE/All tea	im												
	 Meeting with PP&R Operations - systems discussion 														
	b. Facilities Management focus group - FIM requirements	FFA/PAE/P	raxis												
	c. High-Performance Building Plan Strategy options														
	d. Quality Assurance Review														
	e. Draft Strategies														
3.3	LEED Owner's Project Requirements (OPR) Development					0									
	a. OPR Follow-up Meetings					2									
	b. OPR Summary Draft					1									
3.4	Program Refinement														
	 a. Tour similar facilities in the region with stakeholders (Two half day tours) b. Community Engagement - Values and Programming 	FFA FFA/BW/M													
	 c. Focus Group Meetings (Spatial, MEP, & FF&E requirements) 		K			0									
	 d. Quality Assurance Review 	FFA/PAE				3									
	e. Draft Summary														
35	Review with Owner and Track comments	FFA													
5.5	Incorporate Owner Comments & Issue Final Reports	All team				2			1						
	incorporate Owner Comments & Issue Final Reports				_					_	_				
			Hours	0	0	13	0	0	1	0	0	0	0		
			Rate	\$255	\$215	\$185	\$145	\$120	\$115	\$0	\$0	\$0	\$0	•	
			Fee	\$0	\$0	\$2,405	\$0	\$0	\$115	\$0	\$0	\$0	\$0	\$	2,520.00
Teak	Schematic Design (RFP Tasks 5 & 6)												44		owner review
	Meetings												14	2 WKS + 2 WKS	owner review
4.0	a. Owner-Architect meetings (bi-weekly)														
	b. A/E coordination meetings (weekly, 1-hour)	Core desig	n toom n	egularly, oth	er consi	14									
	c. Preliminary LEED scorecard meeting	Core design	nteannn	egulariy, ou	CUIS	14									
	d. Sustainable Procurement kick-off meeting and documentation	BW													
4 1	Develop Three (3) Concept Options	211													
	a. Site and Building plans														
	b. Shoebox Energy Model for massing concepts COVE too	FFA/PAE													
	c. Narratives and LEED strategies	ALL													
	d. Cost estimates														
	e. Quality Assurance, revisions, and issue package														
4.2	Design Charrette One: Three design schemes and select preferred	FFA, BW/N	IR prep												
	 a. Electronic presentation and presentation boards 														
	b. Charette (4 hrs)														
	Develop Preferred Concept														
4.4	Discuss strategy for continued pool operation during construction														
	(fee only for exploring options, full design NIC)														
4.5	Design Charrette Two: Preferred option (4 hours)	FFA													
	a. Electronic presentation and presentation boards														
	b. Charette (4 hrs)														
4.6	Furniture Design - Develop Layouts and Furniture Vision														
	a. Client Meeting - Review furniture layout options / select preferred optior														
	b. Furniture Visioning Meeting with client and track comments	DIM													
4.7	Performance Tracking Reports for Certification/Green Design Requirements	BW													
	a. LEED & Green Building Policy Checklists	BW													
4.0	b. Energy Model for system selection (Utilizing Schematic 3D Model)	PAE													
4.8 4.9	Define scope of work for PP&R to select Commissioning Agent <u>Pre-Application</u> with City of Portland		2000												
4.9	a. Pre-Application package	AP led proc													
		AP/FFA/Ve													
	 b. Pre-application Conference c. Pre-application notes response 	FFA/Vega// ALL TEAM													
1 10	 c. Pre-application notes response <u>100% Schematic Design Package</u> - Assume alternates are included 	ALL I EAM													
4.10.															
	a Drawings					16									
	a. Drawings					16 12									
	a. Drawingsb. Outline Specification & Narratives					16 12									

4.12	Include preliminary LEED Scorecard and high performances measures c. Cost Estimate d. Design and Construction Schedule e. Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report Present SD package to Owner's staff Plan Review Meeting with Owner's staff a. Track comments and provide A/E response Community Presentation (Public Involvement Plan Presentation #1) a. Prepare renderings and presentation materials b. Community input summary report	FFA FFA/PAE/ ALL FFA/MR FFA		0	0	1 1 2 47	0	0	0	0	0	0	0		
			Rate Fee	\$255 \$0	\$215 \$0	\$185 \$8,695	\$145 \$0	\$120 \$0	\$115 \$0	\$0 \$0	\$0 \$0	\$0 \$0	\$0 \$0	\$	8,695.00
Task 5	Design Development (35% CDs) (RFP Tasks 6, 7, & 8)												14 \	wks + 2 wks o	wher review
	Meetings: a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions)												14	WK3 + 2 WK3 0	
	 b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour) A/E Revit model updates due bi-weekly (prior to coordination meeting) 	Core desi	gn team re	egularly, oth	ner consi	9									
5.1	MEP System Selection (RFP Task 7)	PAE led p	rocess												
	 a. MEP Systems Focus Group Meeting with PP&R b. Develop Energy Conservation Measures table 					0									
	Energy Life-Cycle Cost Analysis Life-cycle cost energy savings evaluation /														
	c. Energy Conservation Measures MEP systems Energy Life-Cycle Cost Analysis / Energy conservation														
	 d. opportunities e. Energy Model update based on selected systems, LEED input 														
	f. MEP Systems Selection Package Draft Report					0									
	g. Owner review and comment, A/E response					0			0						
5.2	<u>Systems, Equipment, and Materials Review Meetings</u> (RFP Task 8.10) a. Building Exterior Materials Presentation and Owner Review Meeting b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting														
	 Promoting Fixture Package (cusheets) and Owner Review Meeting Security, A/V, and Technology Systems Package and Owner Coordination Review Meeting 					2									
	d. Lighting and Energy Management Package and Owner Review Meeting					-									
	e. Interior Finishes Presentation and Owner Review Meeting					•									
53	f. Track, respond, and incorporate owner comments for each meeting 50% Design Development Progress Package - Not priced - coordination only	All team				2	2		1						
	a. Drawings					8	16	4							
	 b. Outline Specifications Attach system and material packages 	PAE				12 4			1 1						
	Include draft envelope testing and commissioning requirements	MH/PAE/E	ЗW			4			I						
	c. Outline of furniture specifications and proposed color boards	FFA													
	d. Cost estimate in CSI format e. Updated Design & Construction Schedule	RLB/team	review			1									
	f. Assemble package														
	g. Quality Assurance Review														
5.4	Progress review meeting with the Owner's Project Manager	FFA				•									
5.5	Owner review and comments. A/E track and provide response Value Engineering, as required (RFP Task 8.8)					2 2	2 2		1						
	Land Use Review - Assumed Type III Review (RFP Task 6)	6-12 mont	ths			-	-		•						
	a. Neighborhood meeting (Public Involvement Plan Presentation #2)														
	 Notification and presentation materials for Neighborhood meeting Neighborhood meeting 	FFA FFA/AP/N													
	3. Attendance list and meeting notes	AP	11.X												
	b. Land Use Package	AP													
	1. Development, Draft Report, internal review	All team													
	(Including support drawings, tree plan, reports, and materials board 2. Final Package & Submittal c. Public Hearing														
5.7	c. Public Hearing <u>Public Works Permit (PWP) Process</u>	Vega subr	mitting												

	a. Submit PWP Concept package b. AHJ Package Review meeting				4	2								
5.8	<u>100% Design Development Package</u> (35% Construction Documents)				i									
0.0	a. Drawings (RFP Task 8.11)				3	4								
	b. Specifications				2			1						
	c. Cost Estimate	RLB/team revie	W		1									
	 d. Quality Assurance review and checklists e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab) 	All team												
5.9	Performance Tracking Report Update (RFP Task 8.12)	All lealli												
0.0	a. LEED & Green Building Policy Checklists													
	b. Energy Model update based on selected systems													
	c. Life-Cycle Cost Analysis Update													
5.10.	Plan Review Meeting with Owner's staff a. Track comments and provide A/E response	FFA/PAE			1			1						
	a. Track comments and provide A/L response	11						-			•			
		Hou Ra			54 \$185	28 \$145	4 \$120	7 \$115	0 \$0	0 \$0	0 \$0	0 \$0		
		Fe			\$9,990	\$4,060	\$120 \$480	\$805	\$0 \$0	\$0 \$0	\$0 \$0	\$0 \$0	\$	15,335.00
						• .,• • •							Ŧ	,
	Construction Documents (RFP Task 9)											18 \	weeks	
6.0.	Meetings a. Owner-Architect Meeting													
	 b. Client/Vendor Furniture coordination meetings (five meetings) 													
	c. A/E team coordination meeting (bi-weekly - 1 hour)	Core design tea	am regularly, o	other consi	9									
	A/E Revit model updates due bi-weekly (prior to coordination meeting													
6.1	Public Works Permit (PWP) Process													
	a. Submit PWP Design package b. AHJ Package Review meeting				4	4	1							
62	75% CD Progress Package (RFP Task 9.1)				1									
0.2	a. Drawings				8	16	2							
	b. Specifications				8			1						
	c. Updated Performance Tracking Reports													
	LEED & Green Building Policy Checklists													
	Energy Model based on selected systems (PAE confirm timing) Life-Cycle Cost Analysis													
	d. Preliminary Calculations													
	e. Cost Estimate	RLB/team revie	W		1									
	f. Design & Construction Schedule													
	g. Final Update finishes board (interior and exterior)													
	 h. Issue Tracking log i. Quality Assurance - copy of redline set 													
6.3	Plan Review Meeting with Owner Team (RFP Task 9.1.18.2)	FFA			1									
	a. Track, respond, and incorporate owner comments				2	2		1						
6.4	Systems, Equipment, and Materials Update (RFP Task 8.10)													
	a. Building Exterior Materials Presentation and Owner Review Meeting													
	 Plumbing Fixture Package (cutsheets) and Owner Review Meeting Security, A/V, and Technology Systems Package and Owner Review 													
	c. Meeting				4	2								
	d. Lighting and Energy Management Package and Owner Review Meeting					_								
	e. Interior Finishes Presentation and Owner Review Meeting													
	f. Track, respond, and incorporate owner comments for each meeting				2	1		1						
6.5	95% CD Progress Package (RFP Task 9.2)				0	04	10							
	 a. Drawings b. Specifications (incorporating LEED lists and list of O&M requirements) 				8 8	24	10	1						
	c. Full Design Calculations				0									
	d. Quality Assurance review													
	e. List identifying anticipated long lead items (9.2.5)													
6.7	Plan Review Meeting with Owner Team (9.2.7.2)	FFA/PAE			,	~								
6.8	a. Track, respond, and incorporate owner comments Public Works Permit (PWP) Process				1	2								
0.0	a. Submit PWP Final package				2	2								
	b. AHJ Package Review meeting				-	-								
6.9	100% Construction Documents/ Permit Submittal to PP&R PM	All Team												
	a. Stamped Drawings				2	2								
	b. Stamped Specificationsc. Stamped Final Design Calculations				1	1		1						
	o. Gampoa i ma Dosign Galdulationa													

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6.10.	 d. Updated Cost Estimate e. Permit Application Forms and support documentation Owner review and approval 	RLB/team	review			1									
			Hours Rate Fee	0 \$255 \$0	0 \$215 \$0	63 \$185 \$11,655	56 \$145 \$8,120	13 \$120 \$1,560	5 \$115 \$575	0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	\$	21,910.00
7.0. 7.1	Permitting and Bidding (RFP Task 10) Owner-Architect Update Meetings (monthly) Permitting a. Submit for Permit b. Permit check sheet responses and tracking Bidding														
	a. Prepare Bid Set Documentsb. Pre-Bid Conferencec. Bid Phase A/E Services					2	2								
	Value-Engineering and reissuance (if all bids exceed cost estimate by 20%. Public Works Permit (PWP) Process a. Submit Final Vellum package LEED Design Phase Review/Complete LEED Documentation														
			Hours Rate Fee	0 \$255 \$0	0 \$215 \$0	2 \$185 \$370	2 \$145 \$290	0 \$120 \$0	0 \$115 \$0	0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	\$	660.00
Task 8	Construction Administration (RFP Task 11)												~1	2-18 mo.	
8.1	Meetings a. Pre-Construction Meetings 1. Contractor Kick-off Pre-construction Meeting 2. LEED Pre-construction Meeting 3. Specialty and System Pre-construction Meetings b. Owner-Architect-Contractor Meetings: Weekly site Visits and Observation Reports - four times per month min. 2x per c. month min. (by A/E team - not each consultant) d. Client/Vendor Furniture coordination meetings (five meetings) construction Administration Services (RFP Tasks 11.4-11.7) a. Submittals b. RFIs/ASI's/PCOs c. Certification of Payment Applications d. Changes, CO/PCO/CCD for owner review e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.) Envelope testing a. Mock up Reviews b. Window Testing	MH/FFA				8 4 1 8	4 16 16 12								
8.4	(review of Vendors punch list and furnishings outside of vendors purview) Testing and Balancing (Commissioning agent coordination in Task 9 a. Attend Equipment or System Start up/Testing	1174													
	 b. Testing and balancing observations and Test Data Reviews <u>Substantial Completion Process</u> a. Review General Contractor issued substantial completion punch list b. A/E Punch List Observations and Reports c. Back punch walk of contractor completed punch list d. Issue Certificate of Substantial Completion Cartificate of Ocument 	All Team					2 2		1 1						
8.6	Certificate of Occupancy		Hours Rate Fee	0 \$255 \$0	0 \$215 \$0	21 \$185 \$3,885	52 \$145 \$7,540	0 \$120 \$0	2 \$115 \$230	0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	\$	11,655.00
	Commissioning and LEED Submission(RFP Task 13) A/E coordination of owner provided Commissioning and Testing a. Attend commissioning meetings (minimum of five meetings) b. A/E coordination with owner provided Commissioning Agen1 c. Testing and balancing observations and Test Data Reviews see 8.4 b.														

9.1 LEED Submission a. LEED Construction-Phase and Final Certification Review

b. LEED Submission

	Hours Rate Fee	0 \$255 \$0	0 \$215 \$0	0 \$185 \$0	0 \$145 \$0	0 \$120 \$0	0 \$115 \$0	0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	0 \$0 \$0	\$	-
Task 10 Project Closeout (RFP Task 11 & 14)											1	mo.	
10.1 Asset Management Plan - Review contractor and Praxis deliverables	Praxis												
a. Review Plan and evaluate maintenance and life-cycle informatior	PAE/FFA/MH			1	2								
 B. Review Facility Information Model (FIM) 	PAE/FFA/MH			1	2								
10.2 <u>Final Completion Observations</u> (RFP 14.6)	ALL TEAM												
a. Two (2) comprehensive punch list closeout observations and updates													
10.3 Furnishing Final Completion Observation and Closeout													
10.4 Project Closeout Documents (RFP 14.7)													
a. Record Documents from contractor as-built mark-ups (RFP 14.1)	ALL TEAM												
Update Revit Models				1	4								
Reproducible Record Drawings (PDF)	ALL TEAM				2	4							
 Deperations & Maintenance Manual and closeout document reviews Close out coordination 	FFA			4	2								
10.5 Issue Final Payment after owner final acceptance	FFA												
10.5 Issue Final Fayment alter owner final acceptance													
	Hours	0	0	4	10	4	0	0	0	0	0		
	Rate	\$255	\$215	\$185	\$145	\$120	\$115	\$0 \$0	\$0 \$0	\$0 \$0	\$0 \$0	•	0.070.00
	Fee	\$0	\$0	\$740	\$1,450	\$480	\$0	\$0	\$0	\$0	\$0	\$	2,670.00
										TOTAL	FEES	\$	66,265.00
EX Expenses													
Total Expenses												\$	500.00

66,765.00

\$

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team Updated 4.9.2021

Update	1 4.9.2021			PAE											
				Samata											
				Jumata											
					_										
			Role	pa	Designer									Duration	
				inc	esic.	Role	urat								
														ā	Subtotals
			Rate	\$190	\$150	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100		
Task 1	Project Initiation														
1.1	Detailed Work Plan, Design Program, & Fee (In progress)	FFA													
	a. Scope of Work b. Schedule	All Team FFA													
	c. Detailed Workplan with Fee	All Team													
1.2	Client Kick-off Meeting (PP&R + FFA)	FFA													
1.3	A/E Team Kick-off Meeting (1-hour meeting)	All Team		0	1										
			Hours	0	1	0	0	0	0	0	0	0	0		
			Rate	\$190	\$150	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100		
			Fee	\$0	\$150	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	9	5 150.00
	Pre-Design Assessment (RFP Tasks 2 & 4)				0									4-6 wks	
2.1. 2.2.	Review PP&R provided facility information Develop/Distribute base plans and templates				2										
2.3.	Conduct Assessment Site Visits (1 visit + 1 follow-up)				3										
2.4.	A/E Team Coordination Meetings (Three, One, 1-hour each)				3										
2.5.	Building Assessment Report - Areas to remain (RFP Task 2)	Core desig	ın team ·	+ PBS											
	a. Structural Investigations	ABHT													
	b. Code research and analysis														
	c. Document existing conditions			1	8										
	d. Hazardous Materials Assessment- Confirm scope, see existing PPR reports														
	e. Building Assessment Report			1	8										
2.6.	Site Survey (RFP Task 4)	KPFF													
	a. Private Utility Locates for sitework														
0.7	b. Site survey (Full park site property lines and trees)	ALL TEAM													
2.7.	Site Investigations & Assessment a. Site, zoning, and regulatory research and analysis	Vega, PAE													
	b. Geotechnical exploration and report	PBS	.,												
	c. Stormwater Management Assessment (SWMM)	Vega													
	d. Tree Assessment Survey & Report	PTC/MR													
	e. Site Assessment Report														
	Quality Assurance Review														
2.9 2.10.	Revisions and Issue Electronic Draft Reports Review with Owner and Track comments	FFA													
2.10.	Incorporate Owner Comments & Issue Final Reports	IFA		1	2										
			Hours	3	26	0	0	0	0	0	0	0	0		
			Rate	\$190	20 \$150	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100		
			Fee	\$570	\$3,900	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	9	4,470.00
							,-			,-					,
														0	
	Pre-Design Framework (RFP Task 3) Meetings													6 wks - ov	erlaps with task 2
5.0.	Resilience/ Eco and High-Performance Goal setting workshops (Two 3-hour														
	a. meetings)	FFA/PAE/E	ЗW		4										

 a. meetings)
 FFA/PAE/BW
 4

 b. LEED Owner's Project Requirements (OPR) Kick-off meeting
 BW/PAE/FFA/MR
 1

 c. A/E coordination meetings (Four 1-hour each)
 Core design team

 c. ALE coordination meetings (Four 1-hour each)
 Core design team

 3.1 Building Performance Workshop Summary (includes resilience and sustainability SEE NPB Design Guide a. Whole Building Energy Performance
 PAE, FFA, BW

	b. Site and Irrigation	Vega/MR												
	c. Structural Engineering	ABHT												
	d. Building Enclosure/Envelope	FFA/MH/BW												
	e. Interior Systems – Construction Products and Finish Materials.	FFA/BW												
	f. Mechanical Engineering	PAE												
	g. Lighting Design – Interior and Exterior	PAE												
	h. Electrical Engineering	PAE	2	2										
	i. Quality Assurance Review													
	j. Draft Outline													
3.2	Building Performance Strategies	PAE/All team												
	 Meeting with PP&R Operations - systems discussion 			2										
	 Facilities Management focus group - FIM requirements 	FFA/PAE/Praxis		2										
	c. High-Performance Building Plan Strategy options			0										
	d. Quality Assurance Review													
	e. Draft Strategies													
3.3	LEED Owner's Project Requirements (OPR) Development			0										
	a. OPR Follow-up Meetings b. OPR Summary Draft			2 1										
2.4	Program Refinement			1										
3.4	a. Tour similar facilities in the region with stakeholders (Two half day tours	FFA												
	 b. Community Engagement - Values and Programming 	FFA/BW/MR												
	c. Focus Group Meetings (Spatial, MEP, & FF&E requirements)	FFA/PAE		2										
	d. Quality Assurance Review			2										
	e. Draft Summary			1										
3.5	Review with Owner and Track comments	FFA												
	Incorporate Owner Comments & Issue Final Reports	All team	1	1										
		Hours	3	18	0	0	0	0	0	0	0	0		
		Rate	\$190	\$150	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100		
		Fee	\$570	\$2,700	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	3,270.00
						• •								-,
	4 Schematic Design (RFP Tasks 5 & 6)											12 \	vks + 2 wks o	owner review
4.0														
	a. Owner-Architect meetings (bi-weekly)		_											
	b. A/E coordination meetings (weekly, 1-hour)	Core design team	6											
	c. Preliminary LEED scorecard meeting			1										
	d. Sustainable Procurement kick-off meeting and documentation	BW												
4.1														
	 a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool 	FFA/PAE												
	c. Narratives and LEED strategies	ALL		2										
	d. Cost estimates	ALL		2 1										
	e. Quality Assurance, revisions, and issue package			'										
42	Design Charrette One: Three design schemes and select preferred	FFA, BW/MR prep												
4.2	a. Electronic presentation and presentation boards	i i i i, Biinii i piop												
	b. Charette (4 hrs)			0										
4.3														
4.4														
	Discuss strategy for continued pool operation during construction													
	(fee only for exploring options, full design NIC)			8										
4.5	(fee only for exploring options, full design NIC)	FFA		8										
4.5	(fee only for exploring options, full design NIC) <u>Design Charrette Two:</u> Preferred option (4 hours) a. Electronic presentation and presentation boards	FFA		8										
	(fee only for exploring options, full design NIC) <u>Design Charrette Two:</u> Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs)	FFA		8										
	(fee only for exploring options, full design NIC) <u>Design Charrette Two</u> : Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision	FFA		8										
	(fee only for exploring options, full design NIC) <u>Design Charrette Two:</u> Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior	FFA		8										
4.6	(fee only for exploring options, full design NIC) <u>Design Charrette Two:</u> Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments			8										
4.6	(fee only for exploring options, full design NIC) <u>Design Charrette Two:</u> Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements	BW												
4.6	(fee only for exploring options, full design NIC) <u>Design Charrette Two</u> : Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists	BW BW		8										
4.6 4.7	(fee only for exploring options, full design NIC) <u>Design Charrette Two</u> : Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model)	BW												
4.6 4.7 4.8	(fee only for exploring options, full design NIC) <u>Design Charrette Two</u> : Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agenl	BW BW PAE												
4.6 4.7	(fee only for exploring options, full design NIC) <u>Design Charrette Two:</u> Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agenl <u>Pre-Application</u> with City of Portland	BW BW PAE AP led process												
4.6 4.7 4.8	(fee only for exploring options, full design NIC) <u>Design Charrette Two</u> : Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agenl <u>Pre-Application</u> with City of Portland a. Pre-Application package	BW BW PAE AP led process AP/FFA/Vega/MR												
4.6 4.7 4.8	(fee only for exploring options, full design NIC) <u>Design Charrette Two</u> : Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agenl <u>Pre-Application</u> with City of Portland a. Pre-Application package b. Pre-application Conference	BW BW PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP												
4.6 4.7 4.8 4.9	(fee only for exploring options, full design NIC) <u>Design Charrette Two</u> : Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agenl <u>Pre-Application</u> with City of Portland a. Pre-Application Conference c. Pre-application notes response	BW BW PAE AP led process AP/FFA/Vega/MR												
4.6 4.7 4.8 4.9	(fee only for exploring options, full design NIC) <u>Design Charrette Two</u> : Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agenl <u>Pre-Application</u> with City of Portland a. Pre-Application package b. Pre-application notes response 100% Schematic Design Package_ Assume alternates are included	BW BW PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP	4	2										
4.6 4.7 4.8 4.9	(fee only for exploring options, full design NIC) <u>Design Charrette Two</u> : Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agenl <u>Pre-Application</u> with City of Portland a. Pre-Application Conference c. Pre-application notes response	BW BW PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP	4											

4.12	Include preliminary LEED Scorecard and high performances measures c. Cost Estimate d. Design and Construction Schedule e. Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report Present SD package to Owner's staff Plan Review Meeting with Owner's staff a. Track comments and provide A/E response Community Presentation (Public Involvement Plan Presentation #1) a. Prepare renderings and presentation materials b. Community input summary report	FFA FFA/PAE/ ALL FFA/MR FFA		10 \$190 \$1,900	2 2 4 66 \$150 \$9,900	0 \$100 \$0	\$	11,800.00							
Task 5	Design Development (35% CDs) (RFP Tasks 6, 7, & 8)													14 wks + 2 wks	s owner review
	Meetings:													14 WK3 · 2 WK3	Sowner review
5.0.	a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions)														
	 b. Client/Vendor Furniture coordination meetings (five meetings) 														
	c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour	Core desig	nn team	regularly (9										
	A/E Revit model updates due bi-weekly (prior to coordination meeting	0010 00010	gir tourn	rogalariy, i	4										
5.1	MEP System Selection (RFP Task 7)	PAE led p	rocess												
0.1	a. MEP Systems Focus Group Meeting with PP&R	1712 100 p			2										
	b. Develop Energy Conservation Measures table				2										
	Energy Life-Cycle Cost Analysis Life-cycle cost energy savings evaluation /-														
	c. Energy Conservation Measures														
	MEP systems Energy Life-Cycle Cost Analysis / Energy conservation														
	d. opportunities														
	 Energy Model update based on selected systems, LEED input 														
	f. MEP Systems Selection Package Draft Report				2										
	g. Owner review and comment, A/E response				1										
5.2	Systems, Equipment, and Materials Review Meetings (RFP Task 8.10)														
	a. Building Exterior Materials Presentation and Owner Review Meeting														
	b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting														
	Security, A/V, and Technology Systems Package and Owner Coordination														
	c. Review Meeting				•										
	d. Lighting and Energy Management Package and Owner Review Meeting				2										
	e. Interior Finishes Presentation and Owner Review Meeting														
5.0	f. Track, respond, and incorporate owner comments for each meeting	A II 4													
5.3	50% Design Development Progress Package - Not priced - coordination only a. Drawings	All team		8	42										
	b. Outline Specifications			0	42										
	Attach system and material packages	PAE		'	10										
	Include draft envelope testing and commissioning requirements	MH/PAE/E	RW		10										
	c. Outline of furniture specifications and proposed color boards	FFA													
	d. Cost estimate in CSI format	RLB/team	review		2										
	e. Updated Design & Construction Schedule														
	f. Assemble package														
	g. Quality Assurance Review														
5.4	Progress review meeting with the Owner's Project Manager	FFA													
	Owner review and comments. A/E track and provide response				2										
	Value Engineering, as required (RFP Task 8.8)				4										
5.6	Land Use Review - Assumed Type III Review (RFP Task 6)	6-12 mont	hs												
	a. Neighborhood meeting (Public Involvement Plan Presentation #2)														
	 Notification and presentation materials for Neighborhood meeting Neighborhood meeting 	FFA													
	2. Neighborhood meeting	FFA/AP/M AP	IK												
	 Attendance list and meeting notes Land Use Package 	AP AP													
	 Land Use Package Development, Draft Report, internal review 	AP All team													
	 Development, Drait Report, Internal review (Including support drawings, tree plan, reports, and materials board) 	All leam													
	2. Final Package & Submittal														
	c. Public Hearing														
57	Public Works Permit (PWP) Process	Vega subr	nitting												
5.7		veya subi	mung												

Task 6 Construction Decements (RPF Task 0) 0 weeks 0. Medication 0 weeks 0. Construction Decements (RPF Task 0) 0 weeks 0. Construction Decements (RPF Task 0) 0 weeks 0. Pather Medication medication (RPF Task 0) 0 or decign team regulation, + 9 A. Exect model updates due E-weeks/proto to coordination medication 10 0 1. Pather Medication Pather Decimation 10 2. Schont FWUP Design package 10 3. Derivings 4 46 a. Derivings 1 4 a. Derivings 1 4 b. Specifications 1 4 c. Derivings 2 1 d. Derivings 2 1 4 d. Derivings 2 4 4		 a. Submit PWP Concept package b. AHJ Package Review meeting 100% Design Development Package (35% Construction Documents) a. Drawings (RFP Task 8.11) b. Specifications c. Cost Estimate d. Quality Assurance review and checklists e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab) Performance Tracking Report Update (RFP Task 8.12) a. LEED & Green Building Policy Checklists b. Energy Model update based on selected systems c. Life-Cycle Cost Analysis Update Plan Review Meeting with Owner's staff a. Track comments and provide A/E response 	RLB/team review All team FFA/PAE Hour Rat Fe	rs 10 te \$190	12 40 8 2 1 1 1 2 156 \$150 \$23,400	0 \$100 \$0	Ş	25,300.00							
 a. Owner-Acchinet Meeting: b. Clerit/Verland Funiture coordination meeting (i/ver meeting): A. E. Evan model (packing a backweek) / 10 acc A. E. Evan model (packing a backweek) / 10 acc A. E. Saken P. C. M. P. C. M. Saken P. M. M. M. Saken P. C. M. Saken P. M. M. M. Saken P. M. M. M. M. Saken P. M. M. M. M. M. Saken P. M. M. M. M. M. M. M. Saken P. M. M.													1	8 weeks	
1. Public Works Permit (PWP Process 1 a. Storm (PWP Design package 6 b. AHJ Package Review meeting 2 2. ZMS CO Progress Fackage (RFP Task 0.1) 2 a. Drawings 4 8 c. Descress Database (RFP Task 0.1) 1 c. Descress Database (RFP Task 0.1) 2 d. Descress Database (RFP Task 0.1) 2 d. Database Prosentation Schedule 2 e. Cost Estimate FED & Groeproate Note (RFP) Task 0.1182 (RFP) b. Database Association Schedule 2 c. Database Association Schedule 4 b. Database Association Schedule (RFP) Task 0.1182 (RFP) FFA a. Drawing (RFP) Exel (RFP) Task 0.1182 (RFP) FFA a. Drawing (RFP) Exel (RFP) Task 0.1182 (RFP) FFA b. Descress Evaluation and Comproate Nover Commonte (RFP) 4 b. Descress Evaluation and Comproate Nover Commonte (RFP) 4 b. Desc	6.0.	 a. Owner-Architect Meeting b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly - 1 hour) 	Core design tea	m regularly, (
a. Drawings 75% CD Progress Package (RFP Task 9:1) a. Drawings 4 4 b. Specifications 8 c. Updated Performance Tracking Reports 1 LEED 8 Green Building Policy Checklasts 1 dia Cycle Cast Analyse 2 e. Construction Schedule RLB/team review 2 e. Expland Cast Analyse 2 e. Expland Cast Analyse 2 e. Expland Construction Schedule RLB/team review 2 e. Expland Cast Analyse 2 e. Expland Cast Analyse 2 e. Track, respond, and Incorporate ower comments 2 e. Nature Analyse Cast Analyse 4 e. Statema, Ecutoment and Material StreamInd Analyse 4 b. Statema, Ecutoment and Material StreamInd Analyse 4 e. Indirect Finishe Processitation and Owner Review Meeting 4 e. Indirect Finishe Processitation and Owner Review Meeting 4 f. Track, respond, an	6.1	Public Works Permit (PWP) Process a. Submit PWP Design package			16										
b. Specifications 8 c. Updated Performance Tracking Reports 1 LEED & Green Building Policy Checklists 1 LEED & Green Building Policy Checklists 1 e. Previntandy-Cacklesterms (PAE confirm timing): 1 e. Cost Estimate RLBream review 2 e. Previntandy-Cacklesterms (PAE confirm timing): 1 e. Cost Estimate RLBream review 2 e. Toots Studiets RLBream review 2 e. Toots Studiets RLBream review 2 e. Toots Studiets RLBream review 2 e. Instruction Schedule RLBream review 2 e. Instruction Schedule RLBream review 2 e. Instruction Schedule FA 2 e. Instruction Schedule FA 2 e. Instruction Schedule FA 2 e. Instruction Schedule (PS Task 9.1.18.2) FA FA e. Instruction Schedule (PS Task 9.1.18.2) FA 2 e. Instruction Schedule (PS Task 9.1.18.2) FA 2 e. Instruction Schedule (PS Task 9.1.18.2) FA 2 e. Lipting Stature Preview Meeting	6.2	75% CD Progress Package (RFP Task 9.1)													
LED 3. Green Building Policy Checklists 1 Life-Cycle Cest Analysis 1 e. Pravillations RLB/team review 2 e. Cost Estimates RLB/team review 2 e. Disign & Cost Estimates RLB/team review 2 g. Final Update finishes board (interior and extenior): 4 4 g. Final Update finishes board (interior and extenior): 5 4 i. Ouality Assurance - copy of redline set 5 7 d. Praview Meeting with Owner Team (RFP Task 9.1.18.2): FFA 4 a. Track, respond, and incorporate owner comments 4 4 a. Building Exterior Materials Universe Meeting 5 5 b. Ruleing Fatter Patalege (subtherwer Meeting Security, AV, and Technology Systems Package and Owner Review Meeting Security, AV, and Technology Systems Package and Owner Review Meeting Security, AV, and Technology Systems Package and Owner Review Meeting Security, AV, and Technology Systems Package and Owner Review Meeting Security, AV, and Technology Systems Package and Owner Review Meeting Security, AV, and Technology Systems Package and Owner Review Meeting Security, AV, and Technology Security S				4											
e. Cast Estimate PLBA Construction Schedule PLBA Preview PLBA Preview PLBA Preview PLBA Preview PLBA Preview PLBA PLBA PLBA PLBA PLBA PLBA PLBA PLBA		LEED & Green Building Policy Checklists Energy Model based on selected systems (PAE confirm timing) Life Cycle Cost Analysis			1										
6.3 Pian Review Meeting with Owner Team (RFP Task 9.10.2) FFA a. Track, respond, and incorporate owner comments 4 6.4 Systems, Equipment, and Materials Update (RFP Task 8.10) 4 a. Building Exterior Materials Update (RFP Task 8.10) 4 b. Pinnbing Fixture Package (witch heets) and Owner Review Meeting 4 security, A/V, and Technology Systems Package and Owner Review Meeting 4 c. Meeting 4 d. Lighting and Energy ManagementPackage and Owner Review Meeting 4 e. Interior Finishes Presentation and Owner Review Meeting 4 f. Track, respond, and incorporate owner comments for each meeting 1 d. Quality Assurance review 2 44 b. Specifications (incorporate JEED lists and list of O&M requirements) 1 6 c. Full Design Calculations 2 44 d. Quality Assurance review 2 44 a. Track, respond, and incorporate owner comments 2 44 d. Quality Assurance review 2 44 a. Track, respond, and incorporate owner comments 2 44 d. Quality Assurance review 2 4 e. List identifying anticipated Ing Iead items		e. Cost Estimate f. Design & Construction Schedule g. Final Update finishes board (interior and exterior; h. Issue Tracking Iog	RLB/team review	N	2										
6.4 Systems: Equipment. and Materials: Update (REP Task 8.10) a. Building Exterior: Materials: Presentation and Owner Review Meeting Security, AV, and Technology Systems Package- and Owner Review Meeting b. Plumbing: Fixture Package, future Package- and Owner Review Meeting Security, AV, and Technology Systems Package- and Owner Review Meeting 4 c. Meeting 4 d. Lighting and Energy Management Package- and Owner Review Meeting 4 e. Interior Finishes Presentation and Owner Review Meeting 4 f. Track, respond, and incorporate owner comments for each meeting 4 d. Ughting and Calculations 2 44 b. Specifications (incorporating LEED lists and list of 0&M requirements) 1 6 c. Full Design Calculations 2 44 b. Specifications (incorporating LEED lists and list of 0&M requirements) 1 6 c. Full Design and incorporate owner comments 2 44 b. Specifications (incorporate owner comments 2 4 c. Track, respond, and incorporate owner comments 2 4 c. Track weeting with Owner Team (9.2.7.2) FFA/PAE 1 a. Studnit PW Final package 2 16 b. Multi Power Meeting Permit LWPU Final package 2 16 <td>6.3</td> <td>Plan Review Meeting with Owner Team (RFP Task 9.1.18.2)</td> <td>FFA</td> <td></td> <td>1</td> <td></td>	6.3	Plan Review Meeting with Owner Team (RFP Task 9.1.18.2)	FFA		1										
d. Lighting and Energy Management Package and Owner Review Meeting 4 e. Interior Finishes Presentation and Owner Review Meeting 4 f. Track, respond, and incorporate owner comments for each meeting 2 44 g5% CD Progress Package (RFP Task 9.2) 2 44 a. Drawings 2 44 b. Specifications (incorporating LEED lists and list of O&M requirements) 1 6 c. Full Design Calculations 2 44 d. Quality Assurance review 2 44 e. List identifying anticipated long lead items (9.2.5) 2 4 f. Public Works Permit (PWP) Process 2 4 a. Track, respond, and incorporate owner comments 2 4 f. Public Works Permit (PWP) Process 4 4 a. Submit PWP Final package 2 16 b. AHJ Package Review meeting 2 16 b. AHJ Package Review meeting 2 16 b. Stamped Drawings 4 30 b. Stamped Specifications 2 4	6.4	 <u>Systems, Equipment, and Materials Update</u> (RFP Task 8.10) <u>Building Exterior Materials Presentation and Owner Review Meeting</u> <u>Plumbing Fixture Package (cutsheets) and Owner Review Meeting</u> Security, A/V, and Technology Systems Package and Owner Review 			-										
a. Drawings 2 44 b. Specifications (incorporating LEED lists and list of O&M requirements) 1 6 c. Full Design Calculations 1 6 c. Quality Assurance review 2 4 e. List identifying anticipated long lead items (9.2.5) 2 for. Plan Review Meeting with Owner Team (9.2.7.2) FFA/PAE 1 a. Track, respond, and incorporate owner comments 4 4 for. Public Works Permit (PWP) Process 2 16 a. Submit PWP Final package 2 16 b. AHJ Package Review meeting 2 16 a. Stamped Drawings 4 30 b. Stamped Specifications 2 4		d. Lighting and Energy Management Package and Owner Review Meeting e. Interior Finishes Presentation and Owner Review Meeting			4										
b. Specifications (incorporating LEED lists and list of 0&M requirements) 1 6 c. Full Design Calculations - d. Quality Assurance review - e. List identifying anticipated long lead items (9.2.5) - e. List identifying anticipated long lead items (9.2.7.2) FFA/PAE 1 a. Track, respond, and incorporate owner comments - 4 a. Track, respond, and incorporate owner comments - 4 a. Submit PWP Final package 2 16 b. AHJ Package Review meeting - 2 fo. 100% Construction Documents/ Permit Submittal to PP&R PM All Team a. Stamped Drawings 4 30 b. Stamped Specifications 2 4	6.5	95% CD Progress Package (RFP Task 9.2)		2	44										
6.7 Plan Review Meeting with Owner Team (9.2.7.2) FFA/PAE 1 a. Track, respond, and incorporate owner comments 4 6.8 Public Works Permit (PWP) Process 3 a. Submit PWP Final package 2 16 b. AHJ Package Review meeting 2 16 a. Stamped Drawings 4 30 b. Stamped Specifications 2 4		 b. Specifications (incorporating LEED lists and list of O&M requirements) c. Full Design Calculations d. Quality Assurance review 			6										
6.8 Public Works Permit (PWP) Process a. Submit PWP Final package 2 b. AHJ Package Review meeting 2 for 100% Construction Documents/ Permit Submittal to PP&R PM All Team a. Stamped Drawings 4 b. Stamped Specifications 2	6.7	Plan Review Meeting with Owner Team (9.2.7.2)	FFA/PAE		1										
6.9 100% Construction Documents' Permit Submittal to PP&R PM All Team a. Stamped Drawings 4 30 b. Stamped Specifications 2 4	6.8	Public Works Permit (PWP) Process a. Submit PWP Final package		2	16										
b. Stamped Specifications 2 4	6.9	100% Construction Documents/ Permit Submittal to PP&R PM	All Team	А											
		b. Stamped Specifications		2	4										

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6.10.	 d. Updated Cost Estimate e. Permit Application Forms and support documentation Owner review and approval 	RLB/team	review	1	2										
			Hours Rate Fee	18 \$190 \$3,420	215 \$150 \$32,250	0 \$100 \$0	\$	35,670.00							
	Permitting and Bidding (RFP Task 10)														
7.0. 7.1	Owner-Architect Update Meetings (monthly) <u>Permitting</u> a. Submit for Permit b. Permit check sheet responses and tracking				2										
7.2	Bidding a. Prepare Bid Set Documents				L										
	b. Pre-Bid Conference c. Bid Phase A/E Services				12										
7.4	Value-Engineering and reissuance (if all bids exceed cost estimate by 20% Public Works Permit (PWP) Process a. Submit Final Vellum package														
7.5	LEED Design Phase Review/Complete LEED Documentation				4										
			Hours Rate Fee	0 \$190 \$0	18 \$150 \$2,700	0 \$100 \$0	\$	2,700.00							
Task 8	Construction Administration (RFP Task 11)													~12-18 mo.	
8.0.	Meetings a. Pre-Construction Meetings														
	Contractor Kick-off Pre-construction Meeting LEED Pre-construction Meeting				1										
	Specialty and System Pre-construction Meetings Owner-Architect-Contractor Meetings: Weekly				1										
	Site Visits and Observation Reports - four times per month min. 2x per														
	 c. month min. (by A/E team - not each consultant) d. Client/Vendor Furniture coordination meetings (five meetings) 				16										
	e. LEED update meetings (every 4-6 weeks 9 meetings)														
8.1	Construction Administration Services (RFP Tasks 11.4-11.7) a. Submittals			2	30										
	 b. RFIs/ASI's/PCOs c. Certification of Payment Applications 			2	32										
	d. Changes, CO/PCO/CCD for owner review			2	28										
	e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.) Envelope testing	MH/FFA													
	a. Mock up Reviews														
8.3	 b. Window Testing Furnishing Installation Punch List Observations (anticutor expected by the second punctum) 	FFA													
8.4	(review of Vendors punch list and furnishings outside of vendors purview) Testing and Balancing (Commissioning agent coordination in Task 9 a. Attend Equipment or System Start up/Testing														
	b. Testing and balancing observations and Test Data Reviews														
8.5	Substantial Completion Process a. Review General Contractor issued substantial completion punch list	All Team													
	b. A/E Punch List Observations and Reportsc. Back punch walk of contractor completed punch list				2 3										
	d. Issue Certificate of Substantial Completion				5										
8.6	Certificate of Occupancy			6						0	0	0			
			Hours Rate Fee	\$190 \$1,140	113 \$150 \$16,950	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$100 \$0	0 \$100 \$0	0 \$100 \$0	\$	18,090.00
Task 9	Commissioning and LEED Submission(RFP Task 13)														
	A/E coordination of owner provided Commissioning and Testing a. Attend commissioning meetings (minimum of five meetings)				2										
	 b. A/E coordination with owner provided Commissioning Agen! c. Testing and balancing observations and Test Data Reviews see 8.4 b. 				6										

190457

9.1 LEED Submission a. LEED Construction-Phase and Final Certification Review

b. LEED Submission

1 0 Project Closeout (RFP Task 11 & 14) 1 1 mo. 10.1 Asset Management Plan - Review contractor and Praxis deliverables Praxis a. Review Planity Information Model (FIM) PAE/FFAMH 2 b. Review Planity Information Model (FIM) PAE/FFAMH 3 10.2 Final Completion Observations (RFP 14.6) ALL TEAM 10.3 Funishing Final Completion Observation and Closeoul 3 10.4 Second Documents (RFP 14.7) ALL TEAM a. Record Documents from contractor as-built mark-ups (RFP 14.1) ALL TEAM 24 24 10.5 Issue Final Payment after owner final acceptance FFA 10.5 Issue Final Payment after owner final acceptance FFA 10.5 Issue Final Payment after owner final acceptance FFA Total Expenses Total Expenses Total Expenses		Hours Rate Fee	0 \$190 \$0	8 \$150 \$1,200	0 \$100 \$0	\$	1,200.00							
 10.1 <u>Assert Management Plan</u> - Review contractor and Praxis deliverables a. Review Plan and evaluate maintenance and life-cycle informatior b. Review Plan and evaluate maintenance and life-cycle informatior pAE/FFA/MH 2 PAE/FFA/MH 4 10.2 <u>Final Completion Observations (RFP 14.6)</u> a. Two (2) comprehensive punch list closeout observations and updates a. Two (2) comprehensive punch list closeout observations and updates a. Two (2) comprehensive punch list closeout observations and updates a. Two (2) comprehensive punch list closeout observations and updates a. Two (2) comprehensive punch list closeout observation and Closeout 10.4 <u>Project Closeout Documents (RFP 14.7)</u> a. Record Documents from contractor as-built mark-ups (RFP 14.1) a. Record Documents from contractor as-built mark-ups (RFP 14.1) a. Record Documents from contractor as-built mark-ups (RFP 14.1) a. Record Documents from contractor as-built mark-ups (RFP 14.1) b. Operations & Maintenance Manual and closeout document reviews c. Close out coordination FFA 10.5 Issue Final Payment after owner final acceptance Hours Free No \$150 Stop Free Stop \$4,950 Stop \$100 Stop \$100	Tesk 40 Project Closecut (PED Teck 11 8 14)											1	-	
 a. Review Plan and evaluate maintenance and life-cycle information b. Review Facility Information Model (FIM) b. Review Facility Information Model (FIM) b. Review Facility Information Model (FIM) ALL TEAM a. Two (2) comprehensive punch list closeout observations and updates a. Two (2) comprehensive punch list closeout observation and Closeout a. Record Documents from contractor as-built mark-ups (RFP 14.1)		Provis										I	mo.	
 b. Review Facility Information Model (FIM) a. Two (2) comprehensive punch list closeout observations and updates a. Two (2) comprehensive punch list closeout observations and updates a. Two (2) comprehensive punch list closeout observations and updates a. Two (2) comprehensive punch list closeout observation and Closeout b. Project Closeout Documents (RFP 14.7) a. Record Documents (RFP 14.1) b. Operations & Maintenance Manual and closeout document reviews c. Close out coordination C. Close out coordination FFA TFA TFA Texes a. Thour (2) comprehensive punch list closeout document reviews c. Close out coordination FFA Texes t. The Market punch list closeout document reviews c. Close out coordination FFA Texes t. The Market punch list closeout document reviews c. Close out coordination FFA Texes t. Texes t. Texes<th></th><th></th><th></th><th>2</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th>				2										
10.2 Final Completion Observations (RFP 14.6) a. Two (2) comprehensive punch list closeout observations and updates 3 10.3 Furnishing Final Completion Observation Observation and Closeout 3 10.4 Project Closeout Documents (RFP 14.7) a. Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models Reproducible Record Drawings (PDF) ALL TEAM b. Operations & Maintenance Manual and closeout document reviews c. Close out coordination ALL TEAM FFA 10.5 Issue Final Payment after owner final acceptance FFA Hours 0 33 0 0 0 0 0 0 Rete \$190 \$150 \$100 <th></th>														
 a. Two (2) comprehensive punch list closeout observations and updates a. Two (2) completion Observation and Closeout b. Furnishing Final Completion Observation and Closeout b. Protect Closeout Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models Reproducible Record Drawings (PDF) b. Operations & Maintenance Manual and closeout document reviews c. Close out coordination t. Sue Final Payment after owner final acceptance Hours 0 33 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0				-										
 10.3 Furnishing Final Completion Observation and Closeoul 10.4 Project Closeout Documents (RFP 14.7) a. Record Documents (RFP 14.7) b. Operations & Maintenance Manual and closeout document reviews c. Close out coordination FFA 10.5 Issue Final Payment after owner final acceptance Hours 190 \$150 \$100 \$100 \$100 \$100 \$100 \$100 \$10				3										
 10.4 Project Closeout Documents (RFP 14.7) a. Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models Reproducible Record Drawings (PDF) b. Operations & Maintenance Manual and closeout document reviews				-										
a. Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models ALL TEAM Reproducible Record Drawings (PDF) . b. Operations & Maintenance Manual and closeout document reviews ALL TEAM c. Close out coordination FFA 10.5 Issue Final Payment after owner final acceptance ALL TEAM FFA FFA thours 0 33 0														
Update Revit Models Reproducible Record Drawings (PDF) 24 b. Operations & Maintenance Manual and closeout document reviews c. Close out coordination ALL TEAM FFA 10.5 Issue Final Payment after owner final acceptance FFA Hours Rate \$190 \$150 \$100 <th></th> <th>ALL TEAM</th> <th></th>		ALL TEAM												
b. Operations & Maintenance Manual and closeout document reviews ALL TEAM c. Close out coordination FFA 10.5 Issue Final Payment after owner final acceptance FFA Hours 0 33 0 </th <th></th> <th></th> <th></th> <th>24</th> <th></th>				24										
c. Close out coordination FFA 10.5 Issue Final Payment after owner final acceptance FFA Hours 0 33 0 0 0 0 0 0 Rate \$190 \$150 \$100 <	Reproducible Record Drawings (PDF)													
10.5 Issue Final Payment after owner final acceptance FFA Hours 0 33 0	b. Operations & Maintenance Manual and closeout document reviews	ALL TEAM												
Hours 0 33 0 <th>c. Close out coordination</th> <th>FFA</th> <th></th>	c. Close out coordination	FFA												
Rate \$190 \$150 \$100	10.5 Issue Final Payment after owner final acceptance	FFA												
Fee \$0		Hours	0	33	0	0	0	0	0	0	0	0		
TOTAL FEES \$ 107,600.00		Rate	\$190	\$150	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100		
EX Expenses		Fee	\$0	\$4,950	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	4,950.00
EX Expenses											ΤΟΤΑ	L FEES	\$	107.600.00
													•	,
Total Expenses \$ 500.00	EX Expenses													
	Total Expenses												\$	500.00

108,100.00

\$

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team Updated 4.14.2021

				ega Civil ivil Engine		ng										
			Role W Rate	Buinanan Principal 175	Senior Project 0.21 Engineer	Project Engineer 501\$	Project 66 Designer	<u>90</u> 20 \$100	<u>위</u> 임 (100	<u>위</u> 산 \$100	<u></u>	음 영 8 100	흥 윤 \$100	Duration	Subto	otals
ask 1	Project Initiation															
1.1	Detailed Work Plan, Design Program, & Fee (In progress) a. Scope of Work b. Schedule c. Detailed Workplan with Fee	FFA All Team FFA All Team		1	2											
	Client Kick-off Meeting (PP&R + FFA)	FFA														
1.3	A/E Team Kick-off Meeting (1-hour meeting)	All Team		1	1	1							_			
			Hours Rate Fee	3 \$175 \$525	5 \$170 \$850	1 \$105 \$105		\$100	\$100	\$100	\$100	\$100			\$	1,480.0
ask 2	Pre-Design Assessment (RFP Tasks 2 & 4)													4-6 wks		
2.1. 2.2. 2.3.	Review PP&R provided facility information Develop/Distribute base plans and templates Conduct Assessment Site Visits (1 visit + 1 follow-up) A/E Team Coordination Meetings (Three ,One, 1-hour each) Building Assessment Report - Areas to remain (RFP Task 2) a. Structural Investigations b. Code research and analysis c. Document existing conditions	Core desig ABHT	jn team +	1 PBS	1 1	1 1										
2.6.	 d. Hazardous Materials Assessment- Confirm scope, see existing PPR reports e. Building Assessment Report Site Survey (RFP Task 4) a. Private Utility Locates for sitework 	KPFF														
2.7.	 b. Site survey (Full park site property lines and trees) Site Investigations & Assessment a. Site, zoning, and regulatory research and analysis b. Geotechnical exploration and report 	ALL TEAM Vega, PAE PBS		1	4	8										
	c. Stormwater Management Assessment (SWMM) d. Tree Assessment Survey & Report e. Site Assessment Report	Vega PTC/MR		1	8	8										
	Quality Assurance Review			1	2											
2.9	Revisions and Issue Electronic Draft Reports				1	2										
2.10. 2.11	Review with Owner and Track comments Incorporate Owner Comments & Issue Final Reports	FFA			1	2										
2.11			Hours Rate Fee	4 \$175 \$700	18 \$170 \$3,060	22 \$105 \$2,310	0 \$90	\$100	\$100	\$100	\$100		0 \$100 \$0		\$	6,070.0
	Pre-Design Framework (RFP Task 3) Meetings													6 wks -	overlaps with	n task 2

Te-Design Framework (RFF Task 3)				0 wks - Overlaps with task 2
Veetings				
Resilience/ Eco and High-Performance Goal setting wor	kshops (Two 3-hour			
a. meetings)	FFA/PAE/BW			
b. LEED Owner's Project Requirements (OPR) Kick-off me	eting BW/PAE/FFA/MR			
A/E coordination meetings (Four 1-hour each)	Core design team	4	4	

4

 a. meetings)
 FFA/PAE/BW

 b. LEED Owner's Project Requirements (OPR) Kick-off meeting
 BW/PAE/FFA/MR

 c. A/E coordination meetings (Four 1-hour each)
 Core design team

 3.1
 Building Performance Workshop Summary (includes resilience and sustainability SEE NPB Design Guide

 a. Whole Building Energy Performance
 PAE, FFA, BW

	b. Site and Irrigation) / // AD	4											
	c. Structural Engineering	Vega/MR ABHT	1	4										
	d. Building Enclosure/Envelope	FFA/MH/BW												
	e. Interior Systems – Construction Products and Finish Materials.	FFA/BW												
	f. Mechanical Engineering	PAE												
	 Lighting Design – Interior and Exterior 	PAE												
	h. Electrical Engineering	PAE												
	i. Quality Assurance Review i. Draft Outline													
3.2	J. Dran Outline Building Performance Strategies	PAE/All team												
5.2	a. Meeting with PP&R Operations - systems discussion	FAL/All tealli												
	 b. Facilities Management focus group - FIM requirements 	FFA/PAE/Praxis												
	c. High-Performance Building Plan Strategy options													
	d. Quality Assurance Review													
	e. Draft Strategies													
3.3	LEED Owner's Project Requirements (OPR) Development a. OPR Follow-up Meetings													
	b. OPR Summary Draft													
3.4	Program Refinement													
	a. Tour similar facilities in the region with stakeholders (Two half day tours	FFA												
	b. Community Engagement - Values and Programming	FFA/BW/MR												
	c. Focus Group Meetings (Spatial, MEP, & FF&E requirements)	FFA/PAE												
	d. Quality Assurance Review e. Draft Summary													
35	e. Drait Summary Review with Owner and Track comments	FFA												
0.0	Incorporate Owner Comments & Issue Final Reports	All team												
		Hours	1	8	4	0	0	0	0	0	0	0		
		Rate	\$175	\$170	\$105	\$90	\$100	\$100	\$100	\$100	\$100	\$100		
		Fee	\$175	\$1,360	\$420	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	1,955.00
Took	Schematic Design (RFP Tasks 5 & 6)												12 wks + 2 wks	
	Meetings												12 WK3 - 2 WK3	Sowner review
	a. Owner-Architect meetings (bi-weekly)													
	 A/E coordination meetings (weekly, 1-hour) 	Core design team	regularly, (10	10									
	c. Preliminary LEED scorecard meeting			1.5										
	d. Sustainable Procurement kick-off meeting and documentation	BW												
4.1	Develop Three (3) Concept Options a. Site and Building plans													
	b. Shoebox Energy Model for massing concepts COVE tool	FFA/PAE												
	c. Narratives and LEED strategies	ALL		0										
	d. Cost estimates			0	0									
	e. Quality Assurance, revisions, and issue package		0	0	0									
4.2	<u>Design Charrette One</u> : Three design schemes and select preferred a. Electronic presentation and presentation boards	FFA, BW/MR prep												
	b. Charette (4 hrs)													
4.3	Develop Preferred Concept					,								
4.4	Discuss strategy for continued pool operation during construction													
	(fee only for exploring options, full design NIC)													
4.5	Design Charrette Two: Preferred option (4 hours)	FFA												
	 a. Electronic presentation and presentation boards b. Charette (4 hrs) 													
4.6	Furniture Design - Develop Layouts and Furniture Vision													
4.0	a. Client Meeting - Review furniture layout options / select preferred optior													
	b. Furniture Visioning Meeting with client and track comments													
4.7	Performance Tracking Reports for Certification/Green Design Requirements	BW												
	a. LEED & Green Building Policy Checklists	BW												
4.0	b. Energy Model for system selection (Utilizing Schematic 3D Model)	PAE												
4.8 4.9	Define scope of work for PP&R to select Commissioning Agent <u>Pre-Application</u> with City of Portland	AP led process												
4.0	a. Pre-Application package	AP/FFA/Vega/MR												
	b. Pre-application Conference	FFA/Vega/AP	1											
	c. Pre-application notes response	ALL TEAM		1										
4.10.	<u>100% Schematic Design Package</u> - Assume alternates are included			_										
	a. Drawings b. Outline Specification & Narratives		1	8 8	24	16								
				0										

	Include preliminary LEED Scorecard and high performances measures c. Cost Estimate d. Design and Construction Schedule e. Preliminary FF&E list and costs f. Assemble package	RLB/team	review		2										
	g. Quality Assurance review and checklists			1	4										
4 1 1	h. Revisions and Issue Report Present SD package to Owner's staff	FFA													
	Plan Review Meeting with Owner's staff	FFA/PAE/	Veda		2										
	a. Track comments and provide A/E response	ALL	5		2										
4.13	Community Presentation (Public Involvement Plan Presentation #1) a. Prepare renderings and presentation materials	FFA/MR													
	b. Community input summary report	FFA													
			Hours	3	38.5	34	16	0	0	0	0	0	0		
			Rate Fee	\$175 \$525	\$170 \$6,545	\$105 \$3,570	\$90 \$1,440	\$100 \$0	\$100 \$0	\$100 \$0	\$100 \$0	\$100 \$0	\$100 \$0	\$	12.080.00
Task 5	Design Development (35% CDs) (RFP Tasks 6, 7, & 8)										•••				s owner review
	Meetings:													14 1110 - 2 1110	
	a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions)														
	 b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour) 	Core desig	on team re	gularly, (9	9									
			,	J,, , .	2										
5.1	A/E Revit model updates due bi-weekly (prior to coordination meeting) MEP System Selection (RFP Task 7)	PAE led p	rocess												
0.1	a. MEP Systems Focus Group Meeting with PP&R	i AL iou p	100033												
	b. Develop Energy Conservation Measures table														
	Energy Life-Cycle Cost Analysis Life-cycle cost energy savings evaluation / c. Energy Conservation Measures														
	MEP systems Energy Life-Cycle Cost Analysis / Energy conservation														
	d. opportunities														
	e. Energy Model update based on selected systems, LEED input f. MEP Systems Selection Package Draft Report														
	g. Owner review and comment, A/E response														
5.2	<u>Systems, Equipment, and Materials Review Meetings</u> (RFP Task 8.10) a. Building Exterior Materials Presentation and Owner Review Meeting														
	 b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting 														
	Security, A/V, and Technology Systems Package and Owner Coordination														
	 c. Review Meeting d. Lighting and Energy Management Package and Owner Review Meeting 														
	e. Interior Finishes Presentation and Owner Review Meeting														
5.2	f. Track, respond, and incorporate owner comments for each meeting 50% Design Development Progress Package - Not priced - coordination only	All team													
5.5	a. Drawings	Airteann		1	8	24	24								
	b. Outline Specifications				8										
	Attach system and material packages Include draft envelope testing and commissioning requirements	PAE MH/PAE/E	2\//												
	c. Outline of furniture specifications and proposed color boards	FFA	544												
	d. Cost estimate in CSI format	RLB/team	review		2										
	e. Updated Design & Construction Schedule f. Assemble package														
	g. Quality Assurance Review			1	4										
5.4	Progress review meeting with the Owner's Project Manager	FFA			0										
5.5	Owner review and comments. A/E track and provide response Value Engineering, as required (REP Task 8.8)				2 2										
5.6	Land Use Review - Assumed Type III Review (RFP Task 6)	6-12 mont	hs		-										
	 a. Neighborhood meeting (Public Involvement Plan Presentation #2) 1. Notification and presentation materials for Neighborhood meeting 	FFA													
	 Neighborhood meeting 	FFA FFA/AP/M	IR												
	3. Attendance list and meeting notes	AP													
	 b. Land Use Package 1. Development, Draft Report, internal review 	AP All team			16	40	24								
	(Including support drawings, tree plan, reports, and materials board) 2. Final Package & Submittal				10	40	24								
	c. Public Hearing														

5.7	Public Works Permit (PWP) Process	Vega submitting												
	a. Submit PWP Concept package	0 0	1	12	40	24								
	b. AHJ Package Review meeting			1.5	1.5									
5.8	100% Design Development Package (35% Construction Documents)													
	a. Drawings (RFP Task 8.11)		1	8	16	24								
	b. Specifications			4										
	c. Cost Estimate	RLB/team review		2										
	d. Quality Assurance review and checklists		1	4										
	e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)	All team												
5.9	Performance Tracking Report Update (RFP Task 8.12)													
	a. LEED & Green Building Policy Checklists													
	b. Energy Model update based on selected systems													
	c. Life-Cycle Cost Analysis Update													
5.10.	Plan Review Meeting with Owner's staff	FFA/PAE												
	 a. Track comments and provide A/E response 			2										
		Hours	5	84.5	130.5	96	0	0	0	0	0	0		
		Rate	\$175	\$170	\$105	\$90	\$100	\$100	\$100	\$100	\$100	\$100		
		Fee	\$875		\$13,703	\$8,640	\$0	\$100 \$0	\$0	\$0	\$0	\$0	\$	37.582.50
		100	φ07 J	φ14,303	φ13,703	\$0,040	Φ 0	φυ	φU	φU	φυ	4 0	Ψ	57,502.50
Task F	Construction Documents (RFP Task 9)											18	weeks	
	Meetings											10		
0.0.	a. Owner-Architect Meeting													
	 b. Client/Vendor Furniture coordination meetings (five meetings) 													
	c. A/E team coordination meeting (bi-weekly - 1 hour)	Core design team r	eqularly.	9	9									
		5	5 ,,											
	A/E Revit model updates due bi-weekly (prior to coordination meeting)													
6.1	Public Works Permit (PWP) Process													
	a. Submit PWP Design package		1	16	48	24								
	 AHJ Package Review meeting 			1.5	1.5									
6.2	75% CD Progress Package (RFP Task 9.1)													
	a. Drawings		1	12	32	24								
	b. Specifications			8										
	 Updated Performance Tracking Reports 													
	LEED & Green Building Policy Checklists													
	Energy Model based on selected systems (PAE confirm timing)													
	Life-Cycle Cost Analysis													
	d. Preliminary Calculations													
	e. Cost Estimate	RLB/team review		2										
	f. Design & Construction Schedule													
	 Final Update finishes board (interior and exterior) 													
	h. Issue Tracking log													
	i. Quality Assurance - copy of redline set			4										
6.3	Plan Review Meeting with Owner Team (RFP Task 9.1.18.2)	FFA		2										
	a. Track, respond, and incorporate owner comments			4	8									
6.4	Systems, Equipment, and Materials Update (RFP Task 8.10)													
	a. Building Exterior Materials Presentation and Owner Review Meeting													
	b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting													
	Security, A/V, and Technology Systems Package and Owner Review													
	c. Meeting													
	d. Lighting and Energy Management Package and Owner Review Meeting													
	e. Interior Finishes Presentation and Owner Review Meeting													
0.5	f. Track, respond, and incorporate owner comments for each meeting													
6.5	95% CD Progress Package (RFP Task 9.2)			10										
	a. Drawings		1	16	32	20								
	 b. Specifications (incorporating LEED lists and list of O&M requirements) c. Full Design Calculations 			4	40									
	 c. Full Design Calculations d. Quality Assurance review 			12 4	12									
	 d. Quality Assurance review e. List identifying anticipated long lead items (9.2.5) 			4										
67		FFA/PAE		2										
6.7	Plan Review Meeting with Owner Team (9.2.7.2) a. Track, respond, and incorporate owner comments	FRANCAE		2	4									
6.8	a. Track, respond, and incorporate owner comments Public Works Permit (PWP) Process			2	4									
0.0	a. Submit PWP Final package			8	24									
	 b. AHJ Package Review meeting 			8	24									
6.9	100% Construction Documents/ Permit Submittal to PP&R PM	All Team												
0.9	a. Stamped Drawings			8	16									
	u. etampea Diamingo			0	10									

6.10.	 b. Stamped Specifications c. Stamped Final Design Calculations d. Updated Cost Estimate e. Permit Application Forms and support documentation Owner review and approval 	RLB/team	Hours Rate Fee	3 \$175 \$525	8 8 1 2 134.5 \$170 \$22,865	186.5 \$105 \$19,583	68 \$90 \$6,120	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$	49,092.50
	7 Permitting and Bidding (RFP Task 10)														
7.0. 7.1	Owner-Architect Update Meetings (monthly) Permitting														
	a. Submit for Permit														
7.2	 b. Permit check sheet responses and tracking Bidding 			1	8	24									
	a. Prepare Bid Set Documents				4	8									
	b. Pre-Bid Conference c. Bid Phase A/E Services				1 4	4									
7.3	Value-Engineering and reissuance (if all bids exceed cost estimate by 20%)				4	4									
7.4	Public Works Permit (PWP) Process														
7.5	 a. Submit Final Vellum package LEED Design Phase Review/Complete LEED Documentation 				4	8									
			Hours	1	25	44	0	0	0	0	0	0	0		
			Rate	\$175	\$170	\$105	\$90	\$100	\$100	\$100	\$100	\$100	\$100	•	0.045.00
			Fee	\$175	\$4,250	\$4,620	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	9,045.00
	Construction Administration (RFP Task 11)												~	12-18 mo.	
8.0.	Meetings a. Pre-Construction Meetings														
	1. Contractor Kick-off Pre-construction Meeting				2										
	LEED Pre-construction Meeting Specialty and System Pre-construction Meetings														
	b. Owner-Architect-Contractor Meetings: Weekly														
	Site Visits and Observation Reports - four times per month min. 2x per c. month min. (by A/E team - not each consultant)				2	8									
	d. Client/Vendor Furniture coordination meetings (five meetings)				2	0									
0.4	 EED update meetings (every 4-6 weeks 9 meetings) <u>Construction Administration Services</u> (RFP Tasks 11.4-11.7) 														
8.1	a. Submittals				4	4									
	b. RFIs/ASI's/PCOs				16	16									
	c. Certification of Payment Applications d. Changes, CO/PCO/CCD for owner review				16	12 16									
	e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.)				10										
	Envelope testing a. Mock up Reviews	MH/FFA													
	b. Window Testing														
8.3	Furnishing Installation Punch List Observations (review of Vendors punch list and furnishings outside of vendors purview)	FFA													
8.4	Testing and Balancing (Commissioning agent coordination in Task 9) a. Attend Equipment or System Start up/Testing														
	b. Testing and balancing observations and Test Data Reviews														
8.5	Substantial Completion Process a. Review General Contractor issued substantial completion punch list	All Team													
	 b. A/E Punch List Observations and Reports 														
	c. Back punch walk of contractor completed punch list														
8,6	d. Issue Certificate of Substantial Completion Certificate of Occupancy														
2.5			Hours	0	40	56	0	0	0	0	0	0	0		
			Rate	\$175	\$170	\$105	\$90	\$100	\$100	\$100	\$100	\$100	\$100	•	10 000 00
			Fee	\$0	\$6,800	\$5,880	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	12,680.00

Task 9 Commissioning and LEED Submission(RFP Task 13)

9.0. A/E coordination of owner provided Commissioning and Testing

 a. Attend commissioning meetings (minimum of five meetings)

- b. A/E coordination with owner provided Commissioning Agent
 c. Testing and balancing observations and Test Data Reviews see 8.4 b.
- 9.1 LEED Submission
 - a. LEED Construction-Phase and Final Certification Review
 - b. LEED Submission

		Hours Rate Fee	0 \$175 \$0	0 \$170 \$0	0 \$105 \$0	0 \$90 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$	-
Task 1	Project Closeout (RFP Task 11 & 14)											1	mo.	
10.1	Asset Management Plan - Review contractor and Praxis deliverables	Praxis												
	a. Review Plan and evaluate maintenance and life-cycle information	PAE/FFA/MH												
	b. Review Facility Information Model (FIM)	PAE/FFA/MH												
10.2	Final Completion Observations (RFP 14.6)	ALL TEAM		_										
	a. Two (2) comprehensive punch list closeout observations and updates			8										
10.3	Furnishing Final Completion Observation and Closeout													
10.4	Project Closeout Documents (RFP 14.7)	ALL TEAM		4	8	32								
	a. Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models	ALL I EAIVI		4	0	32								
	Reproducible Record Drawings (PDF)													
	b. Operations & Maintenance Manual and closeout document reviews	ALL TEAM		4										
	c. Close out coordination	FFA												
10.5	Issue Final Payment after owner final acceptance	FFA												
		Hours	0	16	8	32	0	0	0	0	0	0		
		Rate	\$175	\$170	\$105	\$90	\$100	\$100	\$100	\$100	\$100	\$100		
		Fee	\$0	\$2,720	\$840	\$2,880	\$0	\$0	\$0	\$0	\$0	\$0	\$	6.440.00
				. , .										
											TOTA	L FEES	\$	136,425.00
EX	Expenses													
	Total Expenses												\$	200.00
											Contr	act Total	¢	136,625.00
											Contra	actifolal	Þ	130,025.00

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team Updated 4.14.2021

				Landscap	e Architectu	ire			
				_	Project Manager/LA	Landscape Designer	Duration		Subtotals
			Rate	\$225	\$130	\$80			
	Project Initiation						2021		
1.1 1.2 1.3	Detailed Work Plan, Design Program, & Fee (In progress) a. Scope of Work b. Schedule c. Detailed Workplan with Fee Client Kick-off Meeting (PP&R + FFA) A/E Team Kick-off Meeting (1-hour meeting)	FFA All Team FFA All Team FFA All Team		2 2 1	2				
1.0		/ III I Outifi	Hours	5		0			
			Rate	5 \$225 \$1,125	\$130			\$	1,775.00
Task 2	Pre-Design Assessment (RFP Tasks 2 & 4)						4-6 wks;	2021	
2.1. 2.2. 2.3.	Review PP&R provided facility information Develop/Distribute base plans and templates Conduct Assessment Site Visits (1 visit + 1 follow-up) A/E Team Coordination Meetings (Three, One, 1-hour each) Building Assessment Report - Areas to remain (RFP Task 2) a. Structural Investigations b. Code research and analysis c. Document existing conditions	Core desig ABHT	ın team	1 + PBS	1 1 1	1 1			
2.7.	 d. Hazardous Materials Assessment- Confirm scope, see existing PPR reports e. Building Assessment Report Site Survey (RFP Task 4) a. Private Utility Locates for sitework b. Site survey (Full park site property lines and trees) Site Investigations & Assessment a. Site, zoning, and regulatory research and analysis b. Geotechnical exploration and report c. Stormwater Management Assessment (SWMM) d. Tree Assessment Report e. Site Assessment Report 	KPFF ALL TEAM Vega, PAE PBS Vega PTC/MR		0.5		8			
2.8 2.9	Quality Assurance Review Revisions and Issue Electronic Draft Reports			0.5	2	2			

Mayer/Reed, Inc.

2.10. 2.11	Review with Owner and Track comments Incorporate Owner Comments & Issue Final Reports	FFA		2	2		
		Hours Rate Fee	2 \$225 \$450	18.5 \$130 \$2,405	14 \$80 \$1,120	\$	3,975.00
Task 3	Pre-Design Framework (RFP Task 3)					6 wks - overlaps with	task 2 [.] 2021
3.0.	Meetings Resilience/ Eco and High-Performance Goal setting workshops (Two 3-hour						
	 a. meetings) b. LEED Owner's Project Requirements (OPR) Kick-off meeting 	FFA/PAE/BW BW/PAE/FFA/MR		6 1			
3.1	c. A/E coordination meetings (Four 1-hour each) Building Performance Workshop Summary (includes resilience and sustainability		е	4			
	a. Whole Building Energy Performanceb. Site and Irrigationc. Structural Engineering	PAE, FFA, BW Vega/MR ABHT		4			
	 d. Building Enclosure/Envelope e. Interior Systems – Construction Products and Finish Materials. 	FFA/MH/BW FFA/BW					
	 f. Mechanical Engineering g. Lighting Design – Interior and Exterior 	PAE					
	h. Electrical Engineering	PAE					

FFA

FFA/BW/MR

FFA/PAE

PAE/All team

FFA/PAE/Praxis

0.5

0.5

2

1

2

2

1

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2

i. Quality Assurance Review

d. Quality Assurance Review

a. OPR Follow-up Meetings b. OPR Summary Draft 3.4 Program Refinement

d. Quality Assurance Review

a. Meeting with PP&R Operations - systems discussion

c. High-Performance Building Plan Strategy options

3.3 LEED Owner's Project Requirements (OPR) Development

b. Community Engagement - Values and Programming

c. Focus Group Meetings (Spatial, MEP, & FF&E requirements)

b. Facilities Management focus group - FIM requirements

a. Tour similar facilities in the region with stakeholders (Two half day tours)

3.2 Building Performance Strategies

j. Draft Outline

e. Draft Strategies

3.5	e. Draft Summary Review with Owner and Track comments Incorporate Owner Comments & Issue Final Reports	FFA All team Hours				0		
			Rate Fee	\$225 \$225	29 \$130 \$3,770	0 \$80 \$0	\$	3,995.00
Task 4	4 Schematic Design (RFP Tasks 5 & 6)					12	wks + 2 wks	owner review; 2021
4.0	<u>Meetings</u> a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting	Core des	ign team re	egularly, (7 14 2			

4.1 Develop Three (3) Concept Options 2 16 30 a. Site and Building plans 2 2 30 b. Shoebox Energy Model for massing concepts COVE tool FFA/PAE 2 c. Narratives and LEED strategies ALL 2 a. Cost estimates 2 2 c. Oxit estimates 1 2 8 4.2 Design Charatet Answers and presentation boards 1 8 12 b. Charette (4 hrs) 1 1 12 24 4.3 Develop Preferred Oncept 1 1 12 24 4.4 Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) FFA 1 12 24 4.5 Develop Preferred Oncept 1 12 24 1 12 24 4.6 Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) FFA 1 12 24 4.7 Discuss Three policial to infthe region - Develop Layouts and Furniture Vision FFA/PAE 1 1 1 1 1 1 1		d. Sustainable Procurement kick-off meeting and documentation	BW					
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 4.10. 100% Schematic Design Package - Assume alternates are included a. Drawings b. Outline Specification & Narratives c. Cost Estimate d. Design and Construction Schedule e. Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report 4.11 Present SD package to Owner's staff h. Review Meeting with Owner's staff a. Track comments and provide A/E response A.13 Community Presentation (Public Involvement Plan Presentation #1) 		c. Pre-application notes response	ALL TEAM		2			
a. Drawings 1 12 36 b. Outline Specification & Narratives 2 Include preliminary LEED Scorecard and high performances measures 2 c. Cost Estimate RLB/team review 2 d. Design and Construction Schedule 8 e. Preliminary FF&E list and costs 1 4 8 f. Assemble package 1 4 8 g. Quality Assurance review and checklists 1 4 8 h. Revisions and Issue Report 2 2 4.11 Present SD package to Owner's staff FFA 2 4.12 Plan Review Meeting with Owner's staff FFA/PAE/Vega 2 a. Track comments and provide A/E response ALL 2 4.13 Community Presentation (Public Involvement Plan Presentation #1) 2	4.10.	100% Schematic Design Package - Assume alternates are included						
 b. Outline Specification & Narratives Include preliminary LEED Scorecard and high performances measures C. Cost Estimate Design and Construction Schedule Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report 4.11 Present SD package to Owner's staff Hark comments and provide A/E response ALL Community Presentation (Public Involvement Plan Presentation #1) 				1	12	36		
Include preliminary LEED Scorecard and high performances measures 2 c. Cost Estimate RLB/team review 2 d. Design and Construction Schedule 2 e. Preliminary FF&E list and costs 7 f. Assemble package 1 4 8 g. Quality Assurance review and checklists 1 4 8 h. Revisions and Issue Report 2 2 4.11 Present SD package to Owner's staff FFA 2 4.12 Plan Review Meeting with Owner's staff FFA/PAE/Vega 2 a. Track comments and provide A/E response ALL 2 4.13 Community Presentation (Public Involvement Plan Presentation #1) 2								
 c. Cost Estimate d. Design and Construction Schedule e. Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report 4.11 Present SD package to Owner's staff 4.12 Plan Review Meeting with Owner's staff a. Track comments and provide A/E response 4.13 Community Presentation (Public Involvement Plan Presentation #1) 		•						
 d. Design and Construction Schedule e. Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report 4.11 Present SD package to Owner's staff 4.12 Plan Review Meeting with Owner's staff a. Track comments and provide A/E response 4.13 Community Presentation (Public Involvement Plan Presentation #1) 			RI B/team review					
 e. Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report 4.11 Present SD package to Owner's staff 4.12 Plan Review Meeting with Owner's staff a. Track comments and provide A/E response 4.13 Community Presentation (Public Involvement Plan Presentation #1) 			I (ED/touin forlow		2			
f. Assemble package 1 4 8 g. Quality Assurance review and checklists 1 4 8 h. Revisions and Issue Report 2 2 4.11 Present SD package to Owner's staff FFA 2 4.12 Plan Review Meeting with Owner's staff FFA/PAE/Vega 2 a. Track comments and provide A/E response ALL 2 4.13 Community Presentation (Public Involvement Plan Presentation #1) 2								
g. Quality Assurance review and checklists 1 4 8 h. Revisions and Issue Report 2 4.11 Present SD package to Owner's staff FFA 2 4.12 Plan Review Meeting with Owner's staff FFA/PAE/Vega 2 a. Track comments and provide A/E response ALL 2 4.13 Community Presentation (Public Involvement Plan Presentation #1) 2								
h. Revisions and Issue Report 2 4.11 Present SD package to Owner's staff FFA 2 4.12 Plan Review Meeting with Owner's staff FFA/PAE/Vega 2 a. Track comments and provide A/E response ALL 2 4.13 Community Presentation (Public Involvement Plan Presentation #1) 2				4	А	0		
4.11 Present SD package to Owner's staff FFA 2 4.12 Plan Review Meeting with Owner's staff FFA/PAE/Vega a. Track comments and provide A/E response ALL 2 4.13 Community Presentation (Public Involvement Plan Presentation #1) 2				I		0		
4.12 Plan Review Meeting with Owner's staff FFA/PAE/Vega a. Track comments and provide A/E response ALL 2 4.13 Community Presentation (Public Involvement Plan Presentation #1) 2	4 4 4							
a. Track comments and provide A/E response ALL 2 4.13 Community Presentation (Public Involvement Plan Presentation #1) 2					2			
4.13 Community Presentation (Public Involvement Plan Presentation #1)	4.12				~			
			ALL		2			
	4.13							
a. Prepare renderings and presentation materials FFA/MR 1 8 16			FFA/MR	1	8	16		
b. Community input summary report FFA 1		 b. Community input summary report 	FFA		1			
Hours 8 114 134			Hours	Q	11/	13/		
Rate \$225 \$130 \$80								
Fee \$1,800 \$14,820 \$10,720 \$ 27,5				• -			¢	27 -
			ree	φ1,000	φ14,020	φ10,720	φ	27,

Task 5 Design Development (35% CDs) (RFP Tasks 6, 7, & 8)

14 wks + 2 wks owner review; 2022

5.0. <u>Meetings:</u> a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions)

	b. Client/Vendor Furniture coordination meetings (five meetings)			
	c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour	Core design team regularly,	(9	
	A/E Revit model updates due bi-weekly (prior to coordination meeting			
5.1	MEP System Selection (RFP Task 7)	PAE led process		
	a. MEP Systems Focus Group Meeting with PP&R			
	b. Develop Energy Conservation Measures table			
	Energy Life-Cycle Cost Analysis Life-cycle cost energy savings evaluation /			
	c. Energy Conservation Measures			
	MEP systems Energy Life-Cycle Cost Analysis / Energy conservation			
	d. opportunities			
	e. Energy Model update based on selected systems, LEED input			
	f. MEP Systems Selection Package Draft Report			
	 g. Owner review and comment, A/E response 			
5.2	Systems, Equipment, and Materials Review Meetings(RFP Task 8.10)			
	a. Building Exterior Materials Presentation and Owner Review Meeting			
	 Plumbing Fixture Package (cutsheets) and Owner Review Meeting 			
	Security, A/V, and Technology Systems Package and Owner Coordination			
	c. Review Meeting			
	d. Lighting and Energy Management Package and Owner Review Meeting			
	e. Interior Finishes Presentation and Owner Review Meeting			
	f. Track, respond, and incorporate owner comments for each meeting			
5.3	50% Design Development Progress Package - Not priced - coordination only	All team		
	a. Drawings	1		60
	b. Outline Specifications		4	
	Attach system and material packages	PAE		
	Include draft envelope testing and commissioning requirements	MH/PAE/BW		
	c. Outline of furniture specifications and proposed color boards	FFA		
	d. Cost estimate in CSI format	RLB/team review	0	
	e. Updated Design & Construction Schedule		2	0
	f. Assemble package		4	8 4
E 4	g. Quality Assurance Review	1	4	4
5.4	Progress review meeting with the Owner's Project Manager	FFA		
E E	Owner review and comments. A/E track and provide response	C	4 0 0	0
5.5 5.6	Value Engineering, as required (RFP Task 8.8) Land Use Review - Assumed Type III Review (RFP Task 6)	-	0	0
5.6	a. Neighborhood meeting (Public Involvement Plan Presentation #2)	6-12 months		
	 Notification and presentation materials for Neighborhood meeting 	FFA	2	12
	2. Neighborhood meeting	FFA/AP/MR	2	12
	3. Attendance list and meeting notes	AP	2	
	b. Land Use Package	AP		
	1. Development, Draft Report, internal review	All team	8	16
	(Including support drawings, tree plan, reports, and materials board)	Airteann	0	10
	2. Final Package & Submittal		4	8
	c. Public Hearing		- 0	0
5.7	Public Works Permit (PWP) Process	Vega submitting	0	
0.1	a. Submit PWP Concept package	voga submitting		
	b. AHJ Package Review meeting			
5.8	100% Design Development Package (35% Construction Documents)			
0.0	a. Drawings (RFP Task 8.11)	1	24	60
	b. Specifications	•	4	00
	c. Cost Estimate	RLB/team review	2	
			2	

5.9	 d. Quality Assurance review and checklists e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab) <u>Performance Tracking Report Update</u> (RFP Task 8.12) a. LEED & Green Building Policy Checklists <u>Energy Model update based on selected systems</u> 	All team		1	2 0 2		
5.10.	 c. Life-Cycle Cost Analysis Update Plan Review Meeting with Owner's staff a. Track comments and provide A/E response 	FFA/PAE			2		
			Hours Rate Fee	4 \$225 \$900	109 \$130 \$14,170	168 \$80 \$13,440	\$ 28,510.00

Task 6	Construction Documents (RFP Task 9)				18 weeks; 2022
6.0.	Meetings				10 WEEKS, 2022
0.0.	a. Owner-Architect Meeting			4	
	 b. Client/Vendor Furniture coordination meetings (five meetings) 			7	
	c. A/E team coordination meeting (bi-weekly - 1 hour)	Core design team regularl	V (6	
	A/E Revit model updates due bi-weekly (prior to coordination meeting	oore deeligh team regulan	y,`	U	
6.1	Public Works Permit (PWP) Process				
	a. Submit PWP Design package				
	b. AHJ Package Review meeting				
6.2	75% CD Progress Package (RFP Task 9.1)				
	a. Drawings		2	40	186
	b. Specifications			8	
	c. Updated Performance Tracking Reports				
	LEED & Green Building Policy Checklists			2	
	Energy Model based on selected systems (PAE confirm timing)				
	Life-Cycle Cost Analysis				
	d. Preliminary Calculations				
	e. Cost Estimate	RLB/team review		2	
	f. Design & Construction Schedule				
	 Final Update finishes board (interior and exterior) 				
	h. Issue Tracking log				
	 Quality Assurance - copy of redline set 				
6.3	Plan Review Meeting with Owner Team (RFP Task 9.1.18.2)	FFA		4	
	 Track, respond, and incorporate owner comments 			4	
6.4	<u>Systems, Equipment, and Materials Update (RFP Task 8.10)</u>				
	a. Building Exterior Materials Presentation and Owner Review Meeting				
	b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting				
	Security, A/V, and Technology Systems Package and Owner Review				
	c. Meeting				
	d. Lighting and Energy Management Package and Owner Review Meeting				
	e. Interior Finishes Presentation and Owner Review Meeting				
	f. Track, respond, and incorporate owner comments for each meeting				
6.5	95% CD Progress Package (RFP Task 9.2)				
	a. Drawings			24	80
	b. Specifications (incorporating LEED lists and list of O&M requirements)			4	10
	c. Full Design Calculations		•	8	12
	d. Quality Assurance review		2	2	8
	e. List identifying anticipated long lead items (9.2.5)			1	

6.7	Plan Review Meeting with Owner Team (9.2.7.2) a. Track, respond, and incorporate owner comments	FFA/PAE		0 2	8		
6.8	Public Works Permit (PWP) Process a. Submit PWP Final package b. AHJ Package Review meeting						
6.9	<u>100% Construction Documents</u> / Permit Submittal to PP&R PM a. Stamped Drawings b. Stamped Specifications	All Team	2	8 2	12		
	c. Stamped Final Design Calculationsd. Updated Cost Estimate	RLB/team review		2			
6.10.	e. Permit Application Forms and support documentation Owner review and approval						
		Hours Rate Fee	6 \$225 \$1,350	123 \$130 \$15,990	306 \$80 \$24,480	\$	41,820.00
Task 7	Permitting and Bidding (RFP Task 10)					2023	
7.0.	Owner-Architect Update Meetings (monthly)						
7.1	Permitting a. Submit for Permit b. Permit check sheet responses and tracking			4	8		
7.2	Bidding a. Prepare Bid Set Documents b. Pre-Bid Conference			8 2	12		
7 2	c. Bid Phase A/E Services			12 0	0		
7.3 7.4	Value-Engineering and reissuance (if all bids exceed cost estimate by 20%) Public Works Permit (PWP) Process a. Submit Final Vellum package			0	U		
7.5	LEED Design Phase Review/Complete LEED Documentation			2	4		
		Hours Rate Fee	0 \$225 \$0	28 \$130 \$3,640	24 \$80 \$1,920	\$	5,560.00
Tack 9	Construction Administration (REP Took 11)					~12-18 mo.; 2024	
8.0.	Construction Administration (RFP Task 11) Meetings					12-10 110., 2024	
	 a. Pre-Construction Meetings 1. Contractor Kick-off Pre-construction Meeting 2. LEED Pre-construction Meeting 			2			
	 Specialty and System Pre-construction Meetings Owner-Architect-Contractor Meetings: Weekly Site Visits and Observation Reports - four times per month min. 2x per 			24			
	c. month min. (by A/E team - not each consultant)			48			
0.1	 d. Client/Vendor Furniture coordination meetings (five meetings) e. LEED update meetings (every 4-6 weeks 9 meetings) <u>Construction Administration Services</u> (RFP Tasks 11.4-11.7) 			9			
8.1	a. Submittals b. RFIs/ASI's/PCOs			16 24	12 16		
	 c. Certification of Payment Applications d. Changes, CO/PCO/CCD for owner review e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.) 			8	10		

	Envelope testing a. Mock up Reviews	MH/FFA					
8.3	 b. Window Testing Furnishing Installation Punch List Observations (review of Vendors punch list and furnishings outside of vendors purview) 	FFA					
a. b. 8.3 Fur 8.4 Tes 8.5 Sut 8.5 Sut a. b. 8.5 Sut a. b. 8.6 Cer 7ask 9 Cor 9.0. A/E a. b. 0.0. A/E a. b. 9.1 LEE a. b. 10.1 Ass a. b. 10.2 Fina a. a. 10.3 Fur 10.4 Pro a. b. c. b.	Testing and Balancing (Commissioning agent coordination in Task 9) a. Attend Equipment or System Start up/Testing b. Testing and balancing observations and Test Data Reviews						
8.5	<u>Substantial Completion Process</u> a. Review General Contractor issued substantial completion punch list b. A/E Punch List Observations and Reports	All Team		4 8			
	c. Back punch walk of contractor completed punch listd. Issue Certificate of Substantial Completion			4			
8.6	Certificate of Occupancy	Hours	0	147	28		
		Rate Fee	\$225 \$0	\$130 \$19,110	\$80 \$2,240	\$	21,350.00
Task 9	Commissioning and LEED Submission (RFP Task 13)					2025	
	 A/E coordination of owner provided Commissioning and Testing a. Attend commissioning meetings (minimum of five meetings) b. A/E coordination with owner provided Commissioning Agent c. Testing and balancing observations and Test Data Reviews see 8.4 b. LEED Submission 						
	 a. LEED Construction-Phase and Final Certification Review b. LEED Submission 			8			
		Hours Rate Fee	0 \$225 \$0	8 \$130 \$1,040	0 \$80 \$0	\$	1,040.00
Task 1(Project Closeout (RFP Task 11 & 14)					1 mo.; 2025	
10.1	Asset Management Plan - Review contractor and Praxis deliverables a. Review Plan and evaluate maintenance and life-cycle information b. Review Facility Information Model (FIM)	Praxis PAE/FFA/MH PAE/FFA/MH				1 110., 2020	
	<u>Final Completion Observations</u> (RFP 14.6) a. Two (2) comprehensive punch list closeout observations and updates	ALL TEAM					
	Furnishing Final Completion Observation and Closeoul <u>Project Closeout Documents (RFP 14.7)</u>						
10.4	 Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit/Autocad Models Reproducible Record Drawings (PDF) 	ALL TEAM		8 2 4	16 8		
10 5	 b. Operations & Maintenance Manual and closeout document reviews c. Close out coordination 	ALL TEAM FFA		4			
10.5	Issue Final Payment after owner final acceptance	FFA	0	40	04		
		Hours Rate Fee	0 \$225 \$0	18 \$130 \$2,340	24 \$80 \$1,920	\$	4,260.00
				тот	AL FEES	\$	139,625.00

EX	Expenses		
	Total Expenses		\$2,793
		Contract Total	\$142,418

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team Updated April 16, 2021

				Janang Li	ivelope Co	nsultant										
			Role Rate	Junior Tech \$130	Senior Tech 061\$	ම වි \$100	ම වි \$100	ම වි 2 \$100	흥 22 \$100	흥 22 \$100	흥 22 \$100	<mark>광</mark> 산 \$100	ම ස ස \$100	Duration	Subtota	als
	Project Initiation															
	Detailed Work Plan, Design Program, & Fee (In progress) a. Scope of Work b. Schedule c. Detailed Workplan with Fee Client Kick-off Meeting (PP&R + FFA) A/E Team Kick-off Meeting (1-hour meeting)	FFA All Team FFA All Team FFA All Team		1	2 1 1											
			Hours Rate	1 \$130	4 \$190	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100)		
			Fee	\$130	\$760	\$0	\$0	\$0	\$0	\$0	\$0) \$0) \$0)	\$	890.00
Task 2	Pre-Design Assessment (RFP Tasks 2 & 4)													4-6 wks		
2.1.	Review PP&R provided facility information			2	2											
2.2.	Develop/Distribute base plans and templates															
2.3.	Conduct Assessment Site Visits (1 visit + 1 follow-up) A/E Team Coordination Meetings (Three, One, 1-hour each)			8	8											
2.4. 2.5.	Building Assessment Report - Areas to remain (RFP Task 2) a. Structural Investigations b. Code research and analysis c. Document existing conditions	Core desig ABHT	n team ·		1											
	d. Hazardous Materials Assessment- Confirm scope, see existing PPR reports															
2.6.	e. Building Assessment Report Site Survey (RFP Task 4) a. Private Utility Locates for sitework	KPFF		20	12											
2.7.	 b. Site survey (Full park site property lines and trees) Site Investigations & Assessment a. Site, zoning, and regulatory research and analysis b. Geotechnical exploration and reporl c. Stormwater Management Assessment (SWMM) d. Tree Assessment Survey & Report e. Site Assessment Report 	ALL TEAM Vega, PAE PBS Vega PTC/MR														
2.8	Quality Assurance Review				2											
2.9	Revisions and Issue Electronic Draft Reports			2	1											
2.10.	Review with Owner and Track comments	FFA		-												
2.11	Incorporate Owner Comments & Issue Final Reports			2	1											
			Hours Rate Fee	35 \$130 \$4,550	27 \$190 \$5,130	\$100		\$100	\$100	\$100	\$100	\$100	\$100)	\$ 9	9,680.00

Morrsion Hershfield Building Envelope Consultant

Task 3 Pre-Design | Framework (RFP Task 3) 6 wks - overlaps with task 2 3.0. Meetings Resilience/ Eco and High-Performance Goal setting workshops (Two 3-hour a. meetings)
b. LEED Owner's Project Requirements (OPR) Kick-off meeting
c. A/E coordination meetings (Four 1-hour each) FFA/PAE/BW BW/PAE/FFA/MR

Core design team 1

	 Building Performance Workshop Summary (includes resilience and sustainabili a. Whole Building Energy Performance b. Site and Irrigation c. Structural Engineering d. Building Enclosure/Envelope e. Interior Systems – Construction Products and Finish Materials. f. Mechanical Engineering g. Lighting Design – Interior and Exterior h. Electrical Engineering i. Quality Assurance Review j. Draft Outline Building Performance Strategies a. Meeting with PP&R Operations - systems discussion b. Facilities Management focus group - FIM requirements c. High-Performance Review 	ty SEE NPB Design (PAE, FFA, BW Vega/MR ABHT FFA/MH/BW FFA/BW PAE PAE PAE PAE PAE PAE	Guide	2 4 4										
3.3	e. Draft Strategies LEED Owner's Project Requirements (OPR) Development a. OPR Follow-up Meetings													
3.4	b. OPR Summary Draft Program Refinement a. Tour similar facilities in the region with stakeholders (Two half day tours) b. Community Engagement - Values and Programming c. Focus Group Meetings (Spatial, MEP, & FF&E requirements) d. Quality Assurance Review	FFA FFA/BW/MR FFA/PAE												
3.5	e. Draft Summary Review with Owner and Track comments	FFA												
	Incorporate Owner Comments & Issue Final Reports	All team	2	1										
		Hours Rate Fee	2 \$130 \$260	12 \$190 \$2,280	0 \$100 \$0	\$	2,540.00							
Task	4 Schematic Design (RFP Tasks 5 & 6)												12 wks + 2 wks o	owner review
	Meetings													
	 a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting 	Core design team	regularly, (1 2										
4.1	d. Sustainable Procurement kick-off meeting and documentation	BW												
	 a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates 	FFA/PAE ALL												
	 a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package <u>Design Charrette One</u>: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) 													
4.3	 a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package <u>Design Charrette One</u>: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept 	ALL												
	 a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package <u>Design Charrette One</u>: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) <u>Design Charrette Two</u>: Preferred option (4 hours) 	ALL												
4.3 4.4 4.5	 a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package <u>Design Charrette One</u>: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) <u>Design Charrette Two</u>: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) 	ALL FFA, BW/MR prep												
4.3 4.4 4.5 4.6	 a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Eucronic presentation and presentation boards b. Charette (4 hrs) Eucronic presentation and presentation boards b. Charette (4 hrs) Eucronic presentation and presentation boards b. Charette (4 hrs) Eucronic presentation and presentation boards b. Charette (4 hrs) Eucronic presentation and presentation boards b. Charette (4 hrs) Eucronic presentation gevelop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments 	ALL FFA, BW/MR prep FFA												
4.3 4.4 4.5	 a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package <u>Design Charrette One</u>: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) <u>Design Charrette Two</u>: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Develop Preferred Concept</u> Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) <u>Design Charrette Two</u>: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists 	ALL FFA, BW/MR prep FFA BW BW												
4.3 4.4 4.5 4.6 4.7	 a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package <u>Design Charrette One</u>: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) <u>Design Charrette Two</u>: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) 	ALL FFA, BW/MR prep FFA BW												
4.3 4.4 4.5 4.6 4.7	 a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package <u>Design Charrette One</u>: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) <u>Design Charrette Two</u>: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Design Charrette Two</u>: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u>. Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent <u>Pre-Application</u> with City of Portland a. Pre-Application package 	ALL FFA, BW/MR prep FFA BW BW												
4.3 4.4 4.5 4.6 4.7 4.8	 a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package <u>Design Charrette One</u>: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) <u>Design Charrette Two</u>: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent <u>Pre-Application with City of Portland</u> a. Pre-Application package b. Pre-application Conference 	ALL FFA, BW/MR prep FFA BW BW PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP												
4.3 4.4 4.5 4.6 4.7 4.8 4.9	 a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package <u>Design Charrette One</u>: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) <u>Design Charrette Two</u>: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Design Charrette Two</u>: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) <u>Furniture Design</u>. Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent <u>Pre-Application</u> with City of Portland a. Pre-Application package 	ALL FFA, BW/MR prep FFA BW BW PAE AP led process AP/FFA/Vega/MR	3	1 2										

4.11 4.12	 a. Drawings b. Outline Specification & Narratives Include preliminary LEED Scorecard and high performances measures c. Cost Estimate d. Design and Construction Schedule e. Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report Present SD package to Owner's staff a. Track comments and provide A/E response Community Presentation (Public Involvement Plan Presentation #1) 	RLB/team FFA FFA/PAE/V ALL													
	a. Prepare renderings and presentation materials	FFA/MR													
	b. Community input summary report	FFA													
			Hours Rate Fee	3 \$130 \$390	6 \$190 \$1,140	0 \$100 \$0	\$	1,530.00							
Task 5	Design Development (35% CDs) (RFP Tasks 6, 7, & 8)												1	4 wks + 2 wks	owner review
	<u>Meetings:</u> a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions) b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour)	Core desig	n team r	egularly, (8										
	A/E Revit model updates due bi-weekly (prior to coordination meeting <u>MEP System Selection</u> (RFP Task 7) a. MEP Systems Focus Group Meeting with PP&R	PAE led pr	ocess												
	 b. Develop Energy Conservation Measures table Energy Life-Cycle Cost Analysis Life-cycle cost energy savings evaluation / c. Energy Conservation Measures 														
	MEP systems Energy Life-Cycle Cost Analysis / Energy conservation d. opportunities e. Energy Model update based on selected systems, LEED input				1										
	 MEP Systems Selection Package Draft Report Owner review and comment, A/E response 														
	 Systems, Equipment, and Materials Review Meetings (RFP Task 8.10) a. Building Exterior Materials Presentation and Owner Review Meeting b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting Security, A/V, and Technology Systems Package and Owner Coordination 				4										
	c. Review Meeting d. Lighting and Energy Management Package and Owner Review Meeting e. Interior Finishes Presentation and Owner Review Meeting Tarsh users of a light parameter surgery for a ling ling light parameter surgery for a ling light parameter surgery														
	f. Track, respond, and incorporate owner comments for each meeting 50% Design Development Progress Package - Not priced - coordination only	All team													
	a. Drawings b. Outline Specifications			14 12	4 2										
	Attach system and material packages	PAE		12	2										
	Include draft envelope testing and commissioning requirements	MH/PAE/B	W		2										
	c. Outline of furniture specifications and proposed color boards d. Cost estimate in CSI format	FFA RLB/team	roviow												
	e. Updated Design & Construction Schedule f. Assemble package	HEBROUT	i culow												
	g. Quality Assurance Review Progress review meeting with the Owner's Project Manager Owner review and comments. A/E track and provide response	FFA													
5.6	Value Engineering, as required (RFP Task 8.8; Land Use Review - Assumed Type III Review (RFP Task 6) a. Neighborhood meeting (Public Involvement Plan Presentation #2; 1. Notification and presentation materials for Neighborhood meeting	6-12 month	าร												
	2. Neighborhood meeting	FFA/AP/M	R												
	3. Attendance list and meeting notesb. Land Use Package	AP AP													
	 Development, Draft Report, internal review (Including support drawings, tree plan, reports, and materials board) Final Package & Submittal 	All team													

5.7	c. Public Hearing <u>Public Works Permit (PWP) Process</u> a. Submit PWP Concept package b. AHJ Package Review meeting	Vega submitting												
5.8	<u>100% Design Development Package</u> (35% Construction Documents) a. Drawings (RFP Task 8.11) b. Specifications c. Cost Estimate	RLB/team review	3 3	2 2										
5.9	 d. Quality Assurance review and checklists e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab) <u>Performance Tracking Report Update</u> (RFP Task 8.12) a. LEED & Green Building Policy Checklists 	All team	1	1										
5.10.	 b. Energy Model update based on selected systems c. Life-Cycle Cost Analysis Update Plan Review Meeting with Owner's staff a. Track comments and provide A/E response 	FFA/PAE												
		Hours Rate Fee	33 \$130 \$4,290	26 \$190 \$4,940	0 \$100 \$0	\$	9,230.00							
Task 6	Construction Documents (RFP Task 9)											18	3 weeks	
6.0.														
6.1	 c. A/E team coordination meeting (bi-weekly - 1 hour) A/E Revit model updates due bi-weekly (prior to coordination meeting) Public Works Permit (PWP) Process 	Core design team	4	8										
6.2	a. Submit PWP Design package b. AHJ Package Review meeting 75% CD Progress Package (RFP Task 9.1)													
	a. Drawings		14	5										
	 b. Specifications c. Updated Performance Tracking Reports LEED & Green Building Policy Checklists Energy Model based on selected systems (PAE confirm timing) Life-Cycle Cost Analysis e. Preliminary Calculations 		10	3										
	e. Cost Estimate	RLB/team review												
	 f. Design & Construction Schedule g. Final Update finishes board (interior and exterior) h. Issue Tracking log i. Quality Assurance - copy of redline set 													
6.3	Plan Review Meeting with Owner Team (RFP Task 9.1.18.2)	FFA												
6.4	 a. Track, respond, and incorporate owner comments <u>Systems, Equipment, and Materials Update</u>(RFP Task 8.10) a. Building Exterior Materials Presentation and Owner Review Meeting 													
	 Plumbing Fixture Package (cutsheets) and Owner Review Meeting Security, A/V, and Technology Systems Package and Owner Review Meeting 													
	 Lighting and Energy Management Package and Owner Review Meeting Interior Finishes Presentation and Owner Review Meeting Track research and incompared auroperated and the compared to be and incompared auroperated auroper													
6.5	f. Track, respond, and incorporate owner comments for each meeting <u>95% CD Progress Package</u> (RFP Task 9.2)													
	 a. Drawings b. Specifications (incorporating LEED lists and list of O&M requirements) c. Full Design Calculations 		12 10	5 3										
6.7	 Quality Assurance review List identifying anticipated long lead items (9.2.5) Plan Review Meeting with Owner Team (9.2.7.2) a. Track, respond, and incorporate owner comments 	FFA/PAE												
6.8	a. Track, respond, and incorporate owner comments <u>Public Works Permit (PWP) Process</u> a. Submit PWP Final package b. AHJ Package Review meeting													
6.9	And Package Review meeting <u>100% Construction Documents</u> / Permit Submittal to PP&R PM a. Stamped Drawings	All Team		0										

11,060.00

 b. Stamped Specifications 	
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c. Stamped Final Design Calculations

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d. Updated Cost Estimate
                                                                      RLB/team review
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e. Permit Application Forms and support documentation

6.10.	Owner review and approv	al
Tack 7	Pormitting and Ridding	(PED Tack 10)

Task 7 Permitting and Bidding (RFP Task 10)

- 7.0. Owner-Architect Update Meetings (monthly)
- 7.1 Permitting
 - a. Submit for Permit
 - b. Permit check sheet responses and tracking
- 7.2 Bidding
 - a. Prepare Bid Set Documents
 - b. Pre-Bid Conference
 - c. Bid Phase A/E Services

7.3 Value-Engineering and reissuance (if all bids exceed cost estimate by 20%) 7.4 Public Works Permit (PWP) Process

- a. Submit Final Vellum package
- 7.5 LEED Design Phase Review/Complete LEED Documentation

1.5	ELED Design Phase Review/Complete ELED Documentation														
			Hours Rate	0 \$130	0 \$190	0 \$100	0 \$100	0 \$100	0 \$100	0 \$100	0 \$100	0 \$100	0 \$100		
			Fee	\$130 \$0	\$0	\$0	\$100 \$0	\$0	\$0	\$0	\$100	\$0	\$0	\$	-
Task 8	Construction Administration (RFP Task 11)													~12-18 mo.	
8.0.	Meetings														
	a. Pre-Construction Meetings 1. Contractor Kick-off Pre-construction Meeting			0	0										
	2. LEED Pre-construction Meeting			2	2										
	3. Specialty and System Pre-construction Meetings			2	2										
	b. Owner-Architect-Contractor Meetings: Weekly			-	-										
	Site Visits and Observation Reports - four times per month min. 2x per														
	c. month min. (by A/E team - not each consultant)			96	20										
	d. Client/Vendor Furniture coordination meetings (five meetings)														
	e. LEED update meetings (every 4-6 weeks 9 meetings)														
8.1	Construction Administration Services (RFP Tasks 11.4-11.7) a. Submittals			24	8										
	b. RFIs/ASI's/PCOs			24 25	10										
	c. Certification of Payment Applications			20	10										
	d. Changes, CO/PCO/CCD for owner review														
	e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.)														
	Envelope testing	MH/FFA													
	a. Mock up Reviews			24	8										
	b. Window Testing			16	4										
8.3	Furnishing Installation Punch List Observations (review of Vendors punch list and furnishings outside of vendors purview)	FFA													
8.4	Testing and Balancing (Commissioning agent coordination in Task 9) a. Attend Equipment or System Start up/Testing														
	 Testing and balancing observations and Test Data Reviews 														
8.5	Substantial Completion Process	All Team													
	a. Review General Contractor issued substantial completion punch listb. A/E Punch List Observations and Reports			2 2	1 1										
	c. Back punch walk of contractor completed punch list														
	d. Issue Certificate of Substantial Completion			0	0										
8.6	Certificate of Occupancy														
			Hours	193	56	0	0	0	0	0	0	0	0		
			Rate	\$130	\$190	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	•	05 700 00
			Fee	\$25,090	\$10,640	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	35,730.00

Hours

Rate

Fee

50

\$6,500 \$4,560

\$130

24

\$190

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Task 9 Commissioning and LEED Submission(RFP Task 13)

9.0. A/E coordination of owner provided Commissioning and Testing

a. Attend commissioning meetings (minimum of five meetings)

- b. A/E coordination with owner provided Commissioning Agent
 c. Testing and balancing observations and Test Data Reviews see 8.4 b.
- 9.1 LEED Submission
 - a. LEED Construction-Phase and Final Certification Review
 - b. LEED Submission

		Hours Rate Fee	0 \$130 \$0	6 \$190 \$1,140	0 \$100 \$0	\$	1,140.00							
Task 1	0 Project Closeout (RFP Task 11 & 14)												1 mo.	
10.1	Asset Management Plan - Review contractor and Praxis deliverables	Praxis												
	a. Review Plan and evaluate maintenance and life-cycle information	PAE/FFA/MH		3										
	b. Review Facility Information Model (FIM)	PAE/FFA/MH		3										
10.2	Final Completion Observations (RFP 14.6)	ALL TEAM	28	10										
	a. Two (2) comprehensive punch list closeout observations and updates													
10.3	Furnishing Final Completion Observation and Closeout													
10.4	Project Closeout Documents (RFP 14.7)													
	 Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models 	ALL TEAM												
	Reproducible Record Drawings (PDF)													
	b. Operations & Maintenance Manual and closeout document reviews	ALL TEAM	4	2										
	c. Close out coordination	FFA												
10.5	Issue Final Payment after owner final acceptance	FFA												
		Hours	32	18	0	0	0	0	0	0	0	0		
		Rate	\$130	\$190	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100		
		Fee	\$4,160	\$3,420	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	7,580.00
											ΤΟΤΑ	L FEES	\$	79,380.00
EX	Expenses													
	Total Expenses												\$	850.00

Contract Total \$ 80,230.00

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation		12.18.2020 DRAFT
FFA Architecture and Interiors Team Updated 4.9.2021	Acoustic Design Studio Acoustics	
	Role 4 \$160	G Subtotals
Task 1 Project Initiation 1.1 Detailed Work Plan, Design Program, & Fee (In progress) a. Scope of Work b. Schedule c. Detailed Workplan with Fee 1.2 Client Kick-off Meeting (PP&R + FFA) 1.3 A/E Team Kick-off Meeting (1-hour meeting)	FFA All Team FFA All Team FFA All Team Hours 0 Rate \$160 Fee \$0	ş -
Task 2 Pre-Design Assessment (RFP Tasks 2 & 4) 2.1. Review PP&R provided facility information 2.2. Develop/Distribute base plans and templates 2.3. Conduct Assessment Site Visits (1 visit + 1 follow-up) 2.4. A/E Team Coordination Meetings (Three,One, 1-hour each) 2.5. Building Assessment Report - Areas to remain (RFP Task 2) a. Structural Investigations b. Code research and analysis c. Document existing conditions	Core design team 1 ABHT	~6 wks
 d. Hazardous Materials Assessment- Confirm scope, see existing PPR report e. Building Assessment Report 2.6. Site Survey (RFP Task 4) a. Private Utility Locates for sitework b. Site survey (Full park site property lines and trees) 2.7. Site Investigations & Assessment a. Site, zoning, and regulatory research and analysis b. Geotechnical exploration and report c. Stormwater Management Assessment (SWMM) d. Tree Assessment Report e. Site Assessment Report 2.8 Quality Assurance Review 	s KPFF ALL TEAM Vega, PAE, FFA PBS Vega PTC/MR	
 2.9 Revisions and Issue Electronic Draft Reports 2.10. Review with Owner and Track comments 2.11 Incorporate Owner Comments & Issue Final Reports 	FFA Hours 1 Rate \$160 Fee \$160	\$ 160.00
Task 3 Pre-Design Framework (RFP Task 3)		~6 wks

Task 3 Pre-Design | Framework (RFP Task 3)

3.0. Meetings

Resilience/ Eco and High-Performance Goal setting workshops (Two 3-hour a. meetings)

FFA/PAE/BW

- a. interings)
 FFAVFACIOW

 b. LEED Owner's Project Requirements (OPR) Kick-off meeting
 BW/PAE/FFA/MR

 c. A/E coordination meetings (Four 1-hour each)
 Core design team

 3.1
 Building Performance Workshop Summary (includes resilience and sustainability SEE NPB Design Guide
 PAE, FFA, BW
 - a. Whole Building Energy Performance

~6 wks

	b. Site and Irrigation	Vega/MR		
	c. Structural Engineering	ABHT		
	d. Building Enclosure/Envelope	FFA/MH/BW		
	 e. Interior Systems – Construction Products and Finish Materials. 	FFA/BW		
	f. Mechanical Engineering	PAE		
	 Lighting Design – Interior and Exterior 	PAE		
	h. Electrical Engineering	PAE		
	i. Quality Assurance Review			
	j. Draft Outline			
3.2	Building Performance Strategies	PAE/All team		
	 Meeting with PP&R Operations - systems discussion 			
	 b. Facilities Management focus group - FIM requirements 	FFA/PAE/Praxis		
	 c. High-Performance Building Plan Strategy options 			
	d. Quality Assurance Review			
	e. Draft Strategies			
3.3	LEED Owner's Project Requirements (OPR) Development			
	a. OPR Follow-up Meetings			
	b. OPR Summary Draft			
3.4	Program Refinement			
	a. Tour similar facilities in the region with stakeholders (Two half day tours)	FFA		
	b. Community Engagement - Values and Programming	FFA/BW/MR		
	 c. Focus Group Meetings (Spatial, MEP, & FF&E requirements) d. Quality Assurance Review 	FFA/PAE		
	e. Draft Summary			
25	Review with Owner and Track comments	FFA		
3.0	Incorporate Owner Comments & Issue Final Reports	All team		
	incorporate Owner Comments & issue Final Reports			
		Hours	0	
		Rate	\$160	
		Fee	\$0	\$ -
Tack A	Schematic Design (RFP Tasks 5 & 6)			~3.5 mo
	Meetings			0.0 110
	a. Owner-Architect meetings (bi-weekly)			
	b. A/E coordination meetings (weekly, 1-hour)	Core design team reg	ularly, other consultants as needed	
		- 5 5		
	c. Preliminary LEED scorecard meeting			
	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentatior 	BW		
4.1		BW		
4.1	d. Sustainable Procurement kick-off meeting and documentation	BW		
4.1	 d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool 	BW FFA/PAE		
4.1	 d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans 			
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4.2 4.3 4.4 4.5 4.6	 d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Design Charrette (4 hrs) Turniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments 	FFA/PAE ALL FFA, BW/MR prep FFA		
4.2 4.3 4.4 4.5 4.6	 d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments 	FFA/PAE ALL FFA, BW/MR prep FFA		
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 4.2 4.3 4.4 4.5 4.6 4.7 4.8 	 d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Design, Develop Layouts and Furniture Vision a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent Pre-Application package b. Pre-Application package b. Pre-Application package 	FFA/PAE ALL FFA, BW/MR prep FFA BW BW PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP		
 4.2 4.3 4.4 4.5 4.6 4.7 4.8 4.9 	 d. Sustainable Procurement kick-off meeting and documentatior Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Eurniture Design_Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model); Define scope of work for PP&R to select Commissioning Agent Pre-Application motes response 	FFA/PAE ALL FFA, BW/MR prep FFA BW BW PAE AP led process AP/FFA/Vega/MR	6.25	
 4.2 4.3 4.4 4.5 4.6 4.7 4.8 4.9 	 d. Sustainable Procurement kick-off meeting and documentatior Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. LietD & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent Pre-Application notes response 100% Schematic Design Package - Assume alternates are included 	FFA/PAE ALL FFA, BW/MR prep FFA BW BW PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP	<page-footer></page-footer>	
 4.2 4.3 4.4 4.5 4.6 4.7 4.8 4.9 	 d. Sustainable Procurement kick-off meeting and documentatior Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Eurniture Design_Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model); Define scope of work for PP&R to select Commissioning Agent Pre-Application motes response 	FFA/PAE ALL FFA, BW/MR prep FFA BW BW PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP		

4.12	Include preliminary LEED Scorecard and high performances measures c. Cost Estimate d. Design and Construction Schedule e. Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report Present SD package to Owner's staff Plan Review Meeting with Owner's staff a. Track comments and provide A/E response Community Presentation (Public Involvement Plan Presentation #1); a. Prepare renderings and presentation materials b. Community input summary report	RLB/team review FFA FFA/PAE/Vega ALL FFA/MR FFA	6.25		
		Rate Fee	\$160 \$1,000	\$	1,000.00
Task F	Design Development (35% CDs) (RFP Tasks 6, 7, & 8)			~3.5 mo	
	Meetings:			-3.5 mo	
	 a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions) b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour A/E Revit model updates due bi-weekly (prior to coordination meeting) 	, i i i i i i i i i i i i i i i i i i i	regularly, other consultants as needec		
5.1	MEP System Selection (RFP Task 7) a. MEP Systems Focus Group Meeting with PP&R	PAE led process			
5.2	 b. Develop Energy Conservation Measures table c. Energy Life-Cycle Cost Analysis Life-cycle cost energy eavings evaluation /. d. MEP-systems Energy Life-Cycle Cost Analysis / Energy conservation e. Energy Model update based on selected systems, LEED inpul f. MEP Systems Selection Package Draft Report g. Owner review and comment, A/E response Systems, Equipment, and Materials Review Meetings (RFP Task 8.10) a. Building Exterior Materials Presentation and Owner Review Meeting b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting c. Review Meeting d. Lighting and Energy Management Package and Owner Review Meeting 				
	e. Interior Finishes Presentation and Owner Review Meeting				
5.3	f. Track, respond, and incorporate owner comments for each meeting 50% Design Development Progress Package - Not priced - coordination only	All team	15.625		
0.0	a. Drawings b. Outline Specifications	Airtean	10.020		
	Attach system and material packages	PAE			
	Include draft envelope testing and commissioning requirements	MH/PAE/BW			
	c. Outline of furniture specifications and proposed color boards	FFA			
	d. Cost estimate in CSI format	RLB/team review			
	e. Updated Design & Construction Schedule f. Assemble package				
	g. Quality Assurance Review				
5.4	Progress review meeting with the Owner's Project Manager	FFA			
	Owner review and comments. A/E track and provide response				
5.5	Value Engineering, as required (REP Task 8.8)	0.40			
5.6	Land Use Review - Assumed Type III Review (RFP Task 6) a. Neighborhood meeting (Public Involvement Plan Presentation #2)	6-12 months			
	1. Notification and presentation materials for Neighborhood meeting	FFA			
	2. Neighborhood meeting	FFA/AP/MR			
	3. Attendance list and meeting notes	AP			
	 b. Land Use Package 1. Development, Draft Report, internal review 	AP All team			
	(Including support drawings, tree plan, reports, and materials board				
	2. Final Package & Submittal				
	c. Public Hearing				
5.7	Public Works Permit (PWP) Process	Vega submitting			
	a. Submit PWP Concept package				

b. AHJ Package Review meeting

5.8	100% Design Development Package (35% Construction Documents)				
0.0	a. Drawings (RFP Task 8.11)				
	b. Specifications				
	c. Cost Estimate	RLB/team review			
	d. Quality Assurance review and checklists				
	e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)	All team			
5.9	Performance Tracking Report Update (RFP Task 8.12)				
	 LEED & Green Building Policy Checklists 				
	b. Energy Model update based on selected systems				
	c. Life-Cycle Cost Analysis Update				
5.10.	Plan Review Meeting with Owner's staff	FFA/PAE			
	a. Track comments and provide A/E response				
		Hours	15.625		
		Rate	\$160	•	
		Fee	\$2,500	\$	2,500.00
Task 6	Construction Documents (RFP Task 9)			~4.5 mo	
	Meetings			-4.5 110	
0.0.	a. Owner-Architect Meeting				
	b. Client/Vendor Furniture coordination meetings (five meetings)				
	c. A/E team coordination meeting (bi-weekly - 1 hour)	Core design team re	gularly, other consultants as needec		
	A/E Revit model updates due bi-weekly (prior to coordination meeting				
6.1	Public Works Permit (PWP) Process				
	a. Submit PWP Design package				
	b. AHJ Package Review meeting				
6.2	75% CD Progress Package (RFP Task 9.1)		31.25		
	a. Drawings b. Specifications				
	c. Updated Performance Tracking Reports				
	LEED & Green Building Policy Checklists				
	Energy Model based on selected systems (PAE confirm timing)				
	Life-Cycle Cost Analysis				
	d. Preliminary Calculations				
	e. Cost Estimate	RLB/team review			
	f. Design & Construction Schedule				
	 g. Final Update finishes board (interior and exterior) 				
	h. Issue Tracking log				
	i. Quality Assurance - copy of redline set				
6.3	Plan Review Meeting with Owner Team (RFP Task 9.1.18.2)	FFA			
6.4	a. Track, respond, and incorporate owner comments				
6.4	<u>Systems, Equipment, and Materials Update</u> (RFP Task 8.10) a. Building Exterior Materials Presentation and Owner Review Meeting				
	b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting				
	Security, A/V, and Technology Systems Package and Owner Review				
	c. Meeting				
	d. Lighting and Energy Management Package and Owner Review Meeting				
	e. Interior Finishes Presentation and Owner Review Meeting				
	f. Track, respond, and incorporate owner comments for each meeting				
6.5	95% CD Progress Package (RFP Task 9.2)				
	a. Drawings				
	b. Specifications (incorporating LEED lists and list of O&M requirements)				
	c. Full Design Calculations				
	 d. Quality Assurance review e. List identifying anticipated long lead items (9.2.5) 				
6.7	Plan Review Meeting with Owner Team (9.2.7.2)	FFA/PAE			
0.7	a. Track, respond, and incorporate owner comments				
6.8	Public Works Permit (PWP) Process				
5.0	a. Submit PWP Final package				
	b. AHJ Package Review meeting				
6.9	100% Construction Documents/ Permit Submittal to PP&R PM	All Team			
	a. Stamped Drawings				
	b. Stamped Specifications				
	c. Stamped Final Design Calculations				
	d. Updated Cost Estimate	RLB/team review			
	e. Permit Application Forms and support documentation				

6.10. Owner review and approval

6.10.	Owner review and approval		Hours Rate Fee	31.25 \$160 \$5,000		\$	5,000.00
Task 7	Permitting and Bidding (RFP Task 10)						
	Owner-Architect Update Meetings (monthly) Permitting a. Submit for Permit b. Permit check sheet responses and tracking						
7.2	Bidding a. Prepare Bid Set Documents b. Pre-Bid Conference c. Bid Phase A/E Services			2			
7.3 7.4	Value-Engineering and reissuance (if all bids exceed cost estimate by 20%) Public Works Permit (PWP) Process a. Submit Final Vellum package			1.125			
7.5	LEED Design Phase Review/Complete LEED Documentation		Hours Rate Fee	3.125 \$160 \$500		\$	500.00
			100	φ000			300.00
Task 8 8.0.	Construction Administration (RFP Task 11) Meetings				~	18 mo	
	 a. Pre-Construction Meetings 1. Contractor Kick-off Pre-construction Meeting 2. LEED Pre-construction Meeting 3. Specialty and System Pre-construction Meetings b. Owner-Architect-Contractor Meetings: Weekly Site Visits and Observation Reports - four times per month min. 2x per c. month min. (by A/E team - not each consultant) d. Client/Vendor Furniture coordination meetings (five meetings); e. LEED update meetings (every 4-6 weeks 9 meetings) 						
8.1	Construction Administration Services (RFP Tasks 11.4-11.7) a. Submittals b. RFIs/ASI's/PCOs c. Certification of Payment Applications d. Changes, CO/PCO/CCD for owner review e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.) Envelope testing	MH/FFA		9.375			
	a. Mock up Reviews b. Window Testing						
8.3	Furnishing Installation Punch List Observations (review of Vendors punch list and furnishings outside of vendors purview)	FFA					
8.4	Testing and Balancing (Commissioning agent coordination in Task 9) a. Attend Equipment or System Start up/Testing						
0.5	b. Testing and balancing observations and Test Data Reviews	All Team					
0.0	Substantial Completion Process a. Review General Contractor issued substantial completion punch list b. A/E Punch List Observations and Reports c. Back punch walk of contractor completed punch list d. Issue Certificate of Substantial Completion	Air ream					
8.6	Certificate of Occupancy						
			lours Rate Fee	9.375 \$160 \$1,500		\$	1,500.00
Task 9	Commissioning and LEED Submission(RFP Task 13)						
	A/E coordination of owner provided Commissioning and Testing a. Attend commissioning meetings (minimum of five meetings) b. A/E coordination with owner provided Commissioning Agen! c. Testing and balancing observations and Test Data Reviews see 8.4 b.						
9.1	c. Testing and balancing observations and Test Data Reviews see 6.4 b. LEED Submission						

9.1 LEED Submission

a. LEED Construction-Phase and Final Certification Review

b. LEED Submission

		Hours Rate Fee	0 \$160 \$0		\$0 \$	b	-
Task 1) Project Closeout (RFP Task 11 & 14)				1 mo		
10.1 10.2	Asset Management Plan - Review contractor and Praxis deliverables a. Review Plan and evaluate maintenance and life-cycle informatior b. Review Facility Information Model (FIM) <u>Final Completion Observations</u> (RFP 14.6) a. Two (2) comprehensive punch list closeout observations and updates	Praxis PAE/FFA/MH PAE/FFA/MH ALL TEAM					
10.3	Furnishing Final Completion Observation and Closeoul						
10.4	Project Closeout Documents (RFP 14.7)						
	 Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models Reproducible Record Drawings (PDF) 	ALL TEAM					
	b. Operations & Maintenance Manual and closeout document reviews	ALL TEAM					
10.5	c. Close out coordination	FFA FFA					
10.5	Issue Final Payment after owner final acceptance		_				
		Hours Rate	0 \$160				
		Fee	\$100 \$0		\$0 \$	\$	-
				TOTAL FEES	:	\$10	0,660.00
EX	Expenses						
	Total Expenses	No Additional			:	ò	-
				Contract Total	5	\$ 1I	0,660.00

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team Updated 4.9.2021

					vett Buckr	all				
				Cost Estir	mator					
			Role Rate	Resident \$ 055 057	Associate 557\$	Senior Cost 005 Manager	Cost Estimator 051\$	Administrati 56\$ ve 268	Duration	Subtotals
Task 1	Project Initiation									
1.1 1.2 1.3	Detailed Work Plan, Design Program, & Fee (In progress) a. Scope of Work b. Schedule c. Detailed Workplan with Fee Client Kick-off Meeting (PP&R + FFA) A/E Team Kick-off Meeting (1-hour meeting)	FFA All Team FFA All Team FFA All Team								
1.0		, in Fouri	Hours Rate Fee	0 \$230 \$0) \$225	5 \$200	\$150	\$95	\$	-
Task 2	Pre-Design Assessment (RFP Tasks 2 & 4)								4-6 wks	
2.1.	Review PP&R provided facility information									
2.2.	Develop/Distribute base plans and templates									
2.3.	Conduct Assessment Site Visits (1 visit + 1 follow-up)									
2.4. 2.5.	A/E Team Coordination Meetings (Three, One, 1-hour each) Building Assessment Report - Areas to remain (RFP Task 2)	Core desig	gn team	+ PBS						
	a. Structural Investigations	ABHT								
	 b. Code research and analysis c. Document existing conditions Hazardous Materials Assessment- Confirm scope, see existing PPR d. reports 									
0.0	e. Building Assessment Report	KDEE								
2.0.	Site Survey (RFP Task 4) a. Private Utility Locates for sitework	KPFF								
	 b. Site survey (Full park site property lines and trees) 									
2.7.	Site Investigations & Assessment	ALL TEAN								
	a. Site, zoning, and regulatory research and analysis	Vega, PA	E, FFA							
	b. Geotechnical exploration and reportc. Stormwater Management Assessment (SWMM)	PBS Vega								
	d. Tree Assessment Survey & Report	PTC/MR								
	e. Site Assessment Report									
2.8	Quality Assurance Review									
2.9 2.10.	Revisions and Issue Electronic Draft Reports Review with Owner and Track comments	FFA								
2.10.	Incorporate Owner Comments & Issue Final Reports	ΓΈΑ								
-	• • • •		Hours	C) () 0	0	0		

			Rate Fee	\$230 \$0	\$225 \$0	\$200 \$0	\$150 \$0	\$95 \$0	\$-
Task 3	Pre-Design Framework (RFP Task 3)								6 wks - overlaps with task 2
	Meetings Resilience/ Eco and High-Performance Goal setting workshops (Two 3- a. hour meetings) b. LEED Owner's Project Requirements (OPR) Kick-off meeting c. A/E coordination meetings (Four 1-hour each)	FFA/PAE/ BW/PAE/F Core desig	FA/MR						
3.1	 Building Performance Workshop Summary (includes resilience and sustainabilit Whole Building Energy Performance Site and Irrigation Structural Engineering Building Enclosure/Envelope Interior Systems – Construction Products and Finish Materials. Mechanical Engineering Lighting Design – Interior and Exterior Electrical Engineering Quality Assurance Review Draft Outline 	y SEE NPB PAE, FFA Vega/MR ABHT FFA/MH/E FFA/BW PAE PAE PAE PAE	, BW	iide					
3.2	Building Performance Strategies a. Meeting with PP&R Operations - systems discussion b. Facilities Management focus group - FIM requirements c. High-Performance Building Plan Strategy options d. Quality Assurance Review e. Draft Strategies	PAE/All te FFA/PAE/							
3.3 3.4	LEED Owner's Project Requirements (OPR) Development a. OPR Follow-up Meetings b. OPR Summary Draft Program Refinement								
5.4	 a. Tour similar facilities in the region with stakeholders (Two half day tours) b. Community Engagement - Values and Programming c. Focus Group Meetings (Spatial, MEP, & FF&E requirements) d. Quality Assurance Review e. Draft Summary 	FFA FFA/BW/N FFA/PAE	A R						
3.5	Review with Owner and Track comments Incorporate Owner Comments & Issue Final Reports	FFA All team							
		All tealli	Hours Rate Fee	0 \$230 \$0	0 \$225 \$0	0 \$200 \$0	0 \$150 \$0	0 \$95 \$0	\$-
Task 4	Schematic Design (RFP Tasks 5 & 6)								12 wks + 2 wks owner review
4.0	Meetings a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies	Core desig BW FFA/PAE ALL	gn team re	gularly, ot	her consulta	ants as nee	eded		

	d. Cost estimates		8	9	10	9	3			
	e. Quality Assurance, revisions, and issue package									
4.2	Design Charrette One: Three design schemes and select preferred	FFA, BW/MR prep								
	 a. Electronic presentation and presentation boards b. Charette (4 hrs) 									
4.3	Develop Preferred Concept									
4.3 4.4	Discuss strategy for continued pool operation during construction									
4.4	(fee only for exploring options, full design NIC)									
4.5	<u>Design Charrette Two:</u> Preferred option (4 hours)	FFA								
4.0	a. Electronic presentation and presentation boards									
	b. Charette (4 hrs)									
4.6	Furniture Design - Develop Layouts and Furniture Vision									
	a. Client Meeting - Review furniture layout options / select preferred option									
	b. Furniture Visioning Meeting with client and track comments									
4.7		BW								
	a. LEED & Green Building Policy Checklists	BW								
	b. Energy Model for system selection (Utilizing Schematic 3D Model)	PAE								
4.8	Define scope of work for PP&R to select Commissioning Agent									
4.9	Pre-Application with City of Portland	AP led process								
	a. Pre-Application package	AP/FFA/Vega/MR								
	b. Pre-application Conference	FFA/Vega/AP								
	c. Pre-application notes response	ALL TEAM								
4.10.	<u>100% Schematic Design Package</u> - Assume alternates are included									
	a. Drawings									
	 b. Outline Specification & Narratives 									
	Include preliminary LEED Scorecard and high performances measures									
	c. Cost Estimate	RLB/team review	10	9	17	12	5			
	d. Design and Construction Schedule									
	e. Preliminary FF&E list and costs									
	f. Assemble package									
	g. Quality Assurance review and checklists									
4 4 4	h. Revisions and Issue Report									
	Present SD package to Owner's staff	FFA								
4.12	Plan Review Meeting with Owner's staff	FFA/PAE/Vega								
4 1 2	a. Track comments and provide A/E response	ALL								
4.13	Community Presentation (Public Involvement Plan Presentation #1)									
	a. Prepare renderings and presentation materials	FFA/MR								
	b. Community input summary report	FFA								
		Hours	18	18	27	21	8			
		Rate	\$230	\$225	\$200	\$150	\$95			
		Fee	\$4,140	\$4,050	\$5,400	\$3,150	\$760	\$	17,500.0)0
	Design Development (35% CDs) (RFP Tasks 6, 7, & 8)							14 wks + 2 w	s owner revie	N
5.0.	Meetings:									
	a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions)									
	 b. Client/Vendor Furniture coordination meetings (five meetings) 									

b. Client/Vendor Furniture coordination meetings (five meetings)

b. Client/vendor runnitie coordination meetings (nive meetings)
 c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour) A/E Revit model updates due bi-weekly (prior to coordination meeting)
 5.1 <u>MEP System Selection</u> (RFP Task 7)
 a. MEP Systems Focus Group Meeting with PP&R
 b. Develop Energy Conservation Measures table

PAE led process

Core design team regularly, other consultants as needed

	Energy Life-Cycle Cost Analysis Life-cycle cost energy savings evaluation /						
	c. Energy Conservation Measures						
	MEP systems Energy Life-Cycle Cost Analysis / Energy conservation						
	d. opportunities						
	e. Energy Model update based on selected systems, LEED input						
	f. MEP Systems Selection Package Draft Report						
	 g. Owner review and comment, A/E response 						
5.2	Systems, Equipment, and Materials Review Meetings (RFP Task 8.10)						
	a. Building Exterior Materials Presentation and Owner Review Meeting						
	b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting						
	Security, A/V, and Technology Systems Package and Owner Coordination						
	c. Review Meeting						
	d. Lighting and Energy Management Package and Owner Review Meeting						
	e. Interior Finishes Presentation and Owner Review Meeting						
	f. Track, respond, and incorporate owner comments for each meeting						
5.3	50% Design Development Progress Package - Not priced - coordination only	All team					
	a. Drawings						
	b. Outline Specifications						
	Attach system and material packages	PAE					
	Include draft envelope testing and commissioning requirements	MH/PAE/BW					
	c. Outline of furniture specifications and proposed color boards	FFA					
	d. Cost estimate in CSI format	RLB/team review					
	e. Updated Design & Construction Schedule						
	f. Assemble package						
	g. Quality Assurance Review						
5.4	Progress review meeting with the Owner's Project Manager	FFA					
	Owner review and comments. A/E track and provide response						
5.5	Value Engineering, as required (RFP Task 8.8)						
	Land Use Review - Assumed Type III Review (RFP Task 6)	6-12 months					
	a. Neighborhood meeting (Public Involvement Plan Presentation #2)						
	1. Notification and presentation materials for Neighborhood meeting	FFA					
	2. Neighborhood meeting	FFA/AP/MR					
	3. Attendance list and meeting notes	AP					
	b. Land Use Package	AP					
	1. Development, Draft Report, internal review	All team					
	(Including support drawings, tree plan, reports, and materials board)	/ III COUITI					
	2. Final Package & Submittal						
	c. Public Hearing						
5.7	Public Works Permit (PWP) Process	Vega submitting					
0.7	a. Submit PWP Concept package	voga sabrinaing					
	b. AHJ Package Review meeting						
5.8	<u>100% Design Development Package</u> (35% Construction Documents)						
5.0	a. Drawings (RFP Task 8.11)						
	b. Specifications						
	c. Cost Estimate	RLB/team review	14	18	23	25	4
	d. Quality Assurance review and checklists		1-1	10	20	20	7
	e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)	All team					
5.9	Performance Tracking Report Update (RFP Task 8.12)						
5.9	a. LEED & Green Building Policy Checklists						
	b. Energy Model update based on selected systems						
	c. Life-Cycle Cost Analysis Update						
5 10	Plan Review Meeting with Owner's staff	FFA/PAE					
5.10.	a. Track comments and provide A/E response	TIAVEAL					

		Hours Rate Fee	14 \$230 \$3,220	18 \$225 \$4,050	23 \$200 \$4,600	25 \$150 \$3,750	4 \$95 \$380	\$	16,000.00
		100	ψ0,220	ψ+,000	φ+,000	ψ0,700	\$ 000	Ψ	10,000.00
	Construction Documents (RFP Task 9)							18 weeks	
6.0.	Meetings a. Owner-Architect Meeting b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly - 1 hour) A/E Revit model updates due bi-weekly (prior to coordination meeting)	Core design team r	egularly, ot	ther consul	tants as ne	eded			
6.1	Public Works Permit (PWP) Process a. Submit PWP Design package b. AHJ Package Review meeting								
6.2	 75% CD Progress Package (RFP Task 9.1) a. Drawings b. Specifications c. Updated Performance Tracking Reports LEED & Green Building Policy Checklists Energy Model based on selected systems (PAE confirm timing) 								
	Life-Cycle Cost Analysis d. Preliminary Calculations								
	e. Cost Estimate	RLB/team review	15	25	27	27	5		
	 f. Design & Construction Schedule g. Final Update finishes board (interior and exterior) h. Issue Tracking log i. Quality Assurance - copy of redline set 								
6.3	Plan Review Meeting with Owner Team (RFP Task 9.1.18.2)	FFA							
6.4	 a. Track, respond, and incorporate owner comments <u>Systems, Equipment, and Materials Update (</u>RFP Task 8.10) a. Building Exterior Materials Presentation and Owner Review Meeting b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting Security, A/V, and Technology Systems Package and Owner Review 								
6.5	 c. Meeting d. Lighting and Energy Management Package and Owner Review Meeting e. Interior Finishes Presentation and Owner Review Meeting f. Track, respond, and incorporate owner comments for each meeting 95% CD Progress Package (RFP Task 9.2) 								
0.5	 a. Drawings b. Specifications (incorporating LEED lists and list of O&M requirements) c. Full Design Calculations d. Quality Assurance review 								
6.7	e. List identifying anticipated long lead items (9.2.5)Plan Review Meeting with Owner Team (9.2.7.2)a. Track, respond, and incorporate owner comments	FFA/PAE							
6.8	Public Works Permit (PWP) Process a. Submit PWP Final package b. AHJ Package Review meeting								
6.9	<u>100% Construction Documents</u> / Permit Submittal to PP&R PM a. Stamped Drawings b. Stamped Specifications	All Team							
	c. Stamped Final Design Calculationsd. Updated Cost Estimate	RLB/team review	9	16	17	17	4		

e. Permit Application Forms and support documentation

6.10. Owner review and approval

6.10.	Owner review and approval									
			Hours Rate Fee	24 \$230 \$5,520	41 \$225 \$9,225	44 \$200 \$8,800	44 \$150 \$6,600	9 \$95 \$855	\$	31,000.00
Task 7	Permitting and Bidding (RFP Task 10)									
7.0. 7.1	Owner-Architect Update Meetings (monthly) <u>Permitting</u> a. Submit for Permit b. Permit check sheet responses and tracking									
7.2	Bidding a. Prepare Bid Set Documents b. Pre-Bid Conference c. Bid Phase A/E Services									
7.3 7.4 7.5	Value-Engineering and reissuance (if all bids exceed cost estimate by 20%) Public Works Permit (PWP) Process a. Submit Final Vellum package LEED Design Phase Review/Complete LEED Documentation									
7.5	LEED Design Phase Review/Complete LEED Documentation		Hours Rate Fee	0 \$230 \$0	0 \$225 \$0	0 \$200 \$0	0 \$150 \$0	0 \$95 \$0	\$	-
Task 8	Construction Administration (RFP Task 11)								~12-18 mo.	
8.0. 8.1 8.3	Meetings a. Pre-Construction Meetings 1. Contractor Kick-off Pre-construction Meeting 2. LEED Pre-construction Meeting 3. Specialty and System Pre-construction Meetings b. Owner-Architect-Contractor Meetings: Weekly Site Visits and Observation Reports - four times per month min. 2x per c. month min. (by A/E team - not each consultant) d. Client/Vendor Furniture coordination meetings (five meetings) e. LEED update meetings (every 4-6 weeks 9 meetings) <u>Construction Administration Services</u> (RFP Tasks 11.4-11.7) a. Submittals b. RFIs/ASI's/PCOs c. Certification of Payment Applications d. Changes, CO/PCO/CCD for owner review e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.) Envelope testing a. Mock up Reviews b. Window Testing Furnishing Installation Punch List Observations	MH/FFA FFA								
8.4 8.5	 (review of Vendors punch list and furnishings outside of vendors purview) Testing and Balancing (Commissioning agent coordination in Task 9) a. Attend Equipment or System Start up/Testing b. Testing and balancing observations and Test Data Reviews <u>Substantial Completion Process</u> a. Review General Contractor issued substantial completion punch list b. A/E Punch List Observations and Reports c. Back punch walk of contractor completed punch list 	All Team								

d. Issue Certificate of Substantial Completion

8.6 Certificate of Occupancy

		Hours Rate Fee	0 \$230 \$0	0 \$225 \$0	0 \$200 \$0	0 \$150 \$0	0 \$95 \$0	\$	-
Task 9 9.0.	Commissioning and LEED Submission (RFP Task 13) A/E coordination of owner provided Commissioning and Testing								
9.1	 a. Attend commissioning meetings (minimum of five meetings) b. A/E coordination with owner provided Commissioning Agent c. Testing and balancing observations and Test Data Reviews see 8.4 b. LEED Submission a. LEED Construction-Phase and Final Certification Review 								
	b. LEED Submission								
		Hours Rate Fee	0 \$230 \$0	0 \$225 \$0	0 \$200 \$0	0 \$150 \$0	0 \$95 \$0	\$	-
Task 10	0 Project Closeout (RFP Task 11 & 14)						1	mo.	
10.3	Asset Management Plan - Review contractor and Praxis deliverables a. Review Plan and evaluate maintenance and life-cycle information b. Review Facility Information Model (FIM) <u>Final Completion Observations</u> (RFP 14.6) a. Two (2) comprehensive punch list closeout observations and updates Furnishing Final Completion Observation and Closeout Deriverts (Descut Descurate (REP 14.7)	Praxis PAE/FFA/MH PAE/FFA/MH ALL TEAM							
10.4	 <u>Project Closeout Documents (RFP 14.7)</u> a. Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models Reproducible Record Drawings (PDF) b. Operations & Maintenance Manual and closeout document reviews c. Close out coordination 	ALL TEAM ALL TEAM FFA							
10.5	Issue Final Payment after owner final acceptance	FFA							
		Hours Rate Fee	0 \$230 \$0	0 \$225 \$0	0 \$200 \$0	0 \$150 \$0	0 \$95 \$0	\$	-
								\$	64,500.00
EX	Expenses								
	Total Expenses								
	•								

\$ 64,500.00

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team Updated 4.9.2021

Opualed 4.5.2021	KPFF Inc.	
	Survey	
	r e te	
	Principal Principal Survey Manager Surveyor Surveyor Technician Two-Person Survey Crew Administrato	F
	Principal Principal Survey Survey Survey Survey Technicia Two-Pers Survey Technicia	e E D Subtotals
	Princi Surve Surve Surve Surve Projet Projet Projet	G Subtotals
	Rate \$235 \$180 \$130 \$110 \$185 \$100	
Task 1 Project Initiation		
1.1 Detailed Work Plan, Design Program, & Fee (In progress)	FFA	
a. Scope of Work	All Team	
b. Schedule c. Detailed Workplan with Fee	FFA All Team	
1.2 Client Kick-off Meeting (PP&R + FFA)	FFA	
1.3 A/E Team Kick-off Meeting (1-hour meeting)	All Team	
	Hours 0 0 0 0 0 0	
	Rate \$235 \$180 \$130 \$110 \$185 \$100	
	Fee \$0 \$0 \$0 \$0 \$0 \$0	\$ -
Task 2 Pre-Design Assessment (RFP Tasks 2 & 4)		4-6 wks
2.1. Review PP&R provided facility information		
2.2. Develop/Distribute base plans and templates		
2.3. Conduct Assessment Site Visits (1 visit + 1 follow-up)		
 2.4. A/E Team Coordination Meetings (Three, One, 1-hour each) 2.5. Building Assessment Report - Areas to remain (RFP Task 2) 	Core design team + PBS	
a. Structural Investigations	ABHT	
b. Code research and analysis		
c. Document existing conditions		
Hazardous Materials Assessment- Confirm scope, see existing PPR d. reports		
e. Building Assessment Report		
2.6. Site Survey (RFP Task 4)	KPFF	
a. Private Utility Locates for sitework		\$2,300 reimbursable
 b. Site survey (Full park site property lines and trees) c. Site survey (Full park site property lines and trees) 	4 16 16 96 120 6	\$2,500 reimbursable for zoning and title reports
2.7. Site Investigations & Assessmenta. Site, zoning, and regulatory research and analysis	ALL TEAM Vega, PAE, FFA	
 b. Geotechnical exploration and report 	PBS	
c. Stormwater Management Assessment (SWMM)	Vega	
d. Tree Assessment Survey & Report	PTC/MR	
e. Site Assessment Report 2.8 Quality Assurance Review		
2.9 Revisions and Issue Electronic Draft Reports		
2.10. Review with Owner and Track comments	FFA	
2.11 Incorporate Owner Comments & Issue Final Reports		
	Hours 4 16 16 96 120 6	
	Rate \$235 \$180 \$130 \$110 \$185 \$100 Fee \$940 \$2,880 \$2,080 \$10,560 \$22,200 \$600	\$ 39,260.00
	Fee \$940 \$2,880 \$2,080 \$10,560 \$22,200 \$600	\$ 39,200.00
Task 3 Pre-Design Framework (RFP Task 3)		6 wks - overlaps with task 2
3.0. Meetings	- 0	
Resilience/ Eco and High-Performance Goal setting workshops (Two a. hour meetings)	FFA/PAE/BW	
 b. LEED Owner's Project Requirements (OPR) Kick-off meeting 	BW/PAE/FFA/MR	
c. A/E coordination meetings (Four 1-hour each)	Core design team	
3.1 Building Performance Workshop Summary (includes resilience and sust		
a. Whole Building Energy Performance	PAE, FFA, BW	
b. Site and Irrigation c. Structural Engineering	Vega/MR ABHT	
d. Building Enclosure/Envelope	FFA/MH/BW	
 e. Interior Systems – Construction Products and Finish Materials. 	FFA/BW	
f. Mechanical Engineering	PAE	
g. Lighting Design – Interior and Exterior	PAE PAE	
h. Electrical Engineering i. Quality Assurance Review		
j. Draft Outline		
3.2 Building Performance Strategies	PAE/All team	
a. Meeting with PP&R Operations - systems discussion	EEA/DAE/Dravia	
 b. Facilities Management focus group - FIM requirements c. High-Performance Building Plan Strategy options 	FFA/PAE/Praxis	
d. Quality Assurance Review		
e. Draft Strategies		
3.3 LEED Owner's Project Requirements (OPR) Development		
a. OPR Follow-up Meetings		

FA Architecture and Interiors Team Jpdated 4.9.2021		Po	rtland T	ree Consultancy			
		Co	nsullting	Arborist			
	Role		Arborist \$115		Duration	S	ubtotals
Fask 1 Project Initiation 1.1 Detailed Work Plan, Design Program, & Fee (In progress) a. Scope of Work b. Schedule c. Detailed Workplan with Fee	FFA All Team FFA All Team						
 1.2 Client Kick-off Meeting (PP&R + FFA) 1.3 A/E Team Kick-off Meeting (1-hour meeting) 	FFA All Team Hours Rate Fee	е	1 1 \$115 \$115			\$	115.00
ask 2 Pre-Design Assessment (RFP Tasks 2 & 4)					4-6 wks		
2.1. Review PP&R provided facility information 2.2. Develop/Distribute base plans and templates							
2.3. Conduct Assessment Site Visits (1 visit + 1 follow-up)							
 2.4. A/E Team Coordination Meetings (Three, One, 1-hour each) 2.5. Building Assessment Report - Areas to remain (RFP Task 2) 	Core design tean	m ⊥ □	DRC				
a. Structural Investigations	ABHT		DO				
b. Code research and analysisc. Document existing conditions							
d. Hazardous Materials Assessment- Confirm scope, see existing PPR reports							
e. Building Assessment Report 2.6. Site Survey (RFP Task 4)	KPFF						
a. Private Utility Locates for sitework	IXF I I						
 b. Site survey (Full park site property lines and trees) 2.7. Site Investigations & Assessment 	ALL TEAM						
a. Site, zoning, and regulatory research and analysis	Vega, PAE, FFA						
 b. Geotechnical exploration and report c. Stormwater Management Assessment (SWMM) 	PBS Vega						
d. Tree Assessment Survey & Report	PTC/MR		14				
e. Site Assessment Report							
2.8 Quality Assurance Review2.9 Revisions and Issue Electronic Draft Reports							
2.10. Review with Owner and Track comments	FFA						
2.11 Incorporate Owner Comments & Issue Final Reports	Laure	~					
	Hours		14 \$115				
	Fee	е	\$1,610			\$	1,610.00
Task 3 Pre-Design Framework (RFP Task 3)					6 wko	worlong	with task 2

Task 3 Pre-Design | Framework (RFP Task 3)

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation

	(
3.0. Meetings			
Resilience/ E	co and High-Performance Goal se	tting workshops (Two 3-hour	
a. meetings)		F	FFA/PAE/BW
b. LEED Owner	s Project Requirements (OPR) Ki	ck-off meeting	BW/PAE/FFA/MR

 c. ALE coordination meetings (Four 1-hour each)
 Core design team

 3.1 Building Performance Workshop Summary (includes resilience and sustainability SEE NPB Design Guide a. Whole Building Energy Performance
 PAE, FFA, BW

6 wks - overlaps with task 2

	b. Site and Irrigation	Vega/MR	
	c. Structural Engineering	ABHT	
	d. Building Enclosure/Envelope	FEA/MH/BW	
	e. Interior Systems – Construction Products and Finish Materials.	FFAIBW	
	f. Mechanical Engineering	PAE	
	g. Lighting Design – Interior and Exterior	PAE	
	h. Electrical Engineering	PAE	
	i. Quality Assurance Review		
	j. Draft Outline		
3.2	Building Performance Strategies	PAE/All team	
0.2	a. Meeting with PP&R Operations - systems discussion		
	 b. Facilities Management focus group - FIM requirements 	FFA/PAE/Praxis	
	c. High-Performance Building Plan Strategy options		
	d. Quality Assurance Review		
	e. Draft Strategies		
33	LEED Owner's Project Requirements (OPR) Development		
5.5	a. OPR Follow-up Meetings		
	b. OPR Summary Draft		
3.4	Program Refinement		
3.4	a. Tour similar facilities in the region with stakeholders (Two half day tours	FFA	
	b. Community Engagement - Values and Programming	FFA/BW/MR	
	c. Focus Group Meetings (Spatial, MEP, & FF&E requirements)	FFA/PAE	
	d. Quality Assurance Review		
	e. Draft Summary		
3.5	Review with Owner and Track comments	FEA	
0.0	Incorporate Owner Comments & Issue Final Reports	All team	
	incorporate owner ooninnents & issue i mar reports		
		Hours 0	
		Rate \$115	
		Fee \$0	\$ -
	Ochamatic Desires (DED Table 5.9.0)		
	Schematic Design (RFP Tasks 5 & 6)		12 wks + 2 wks owner review
4.0			
	 Owner-Architect meetings (bi-weekly) 		
	h A/E accordination montings (weakly 1 hour)		
	b. A/E coordination meetings (weekly, 1-hour)	Core design team regularly, other consultants as needec	
	c. Preliminary LEED scorecard meeting		
4.4	c. Preliminary LEED scorecard meetingd. Sustainable Procurement kick-off meeting and documentation	Core design team regularly, other consultants as needec BW	
4.1	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options 		
4.1	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans 	BW	
4.1	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool 	BW FFA/PAE	
4.1	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies 	BW	
4.1	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates 	BW FFA/PAE	
	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package 	BW FFA/PAE ALL	
	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred 	BW FFA/PAE	
	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards 	BW FFA/PAE ALL	
4.2	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) 	BW FFA/PAE ALL	
4.2 4.3	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept 	BW FFA/PAE ALL	
4.2	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction 	BW FFA/PAE ALL	
4.2 4.3 4.4	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) 	BW FFA/PAE ALL FFA, BW/MR prep	
4.2 4.3	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) 	BW FFA/PAE ALL	
4.2 4.3 4.4	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC, Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards 	BW FFA/PAE ALL FFA, BW/MR prep	
4.2 4.3 4.4 4.5	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) 	BW FFA/PAE ALL FFA, BW/MR prep	
4.2 4.3 4.4 4.5	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) a. Electronic presentation and presentation boards b. Charette (4 hrs) a. Electronic presentation and presentation boards b. Charette (4 hrs) purniture Design - Develop Layouts and Furniture Vision 	BW FFA/PAE ALL FFA, BW/MR prep	
4.2 4.3 4.4 4.5	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two; Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Turniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred option 	BW FFA/PAE ALL FFA, BW/MR prep	
4.2 4.3 4.4 4.5 4.6	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Design Charrette 4 hrs) Destructure presentation and presentation boards a. Clertonic presentation and presentation boards b. Charette (4 hrs) Curriture Design. Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments 	BW FFA/PAE ALL FFA, BW/MR prep FFA	
4.2 4.3 4.4 4.5	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Desting Preferred (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments 	BW FFA/PAE ALL FFA, BW/MR prep FFA	
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4.2 4.3 4.4 4.5 4.6 4.7 4.8	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Eurniture Design, - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agenl 	BW FFA/PAE ALL FFA, BW/MR prep FFA BW BW BW BW PAE	
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4.2 4.3 4.4 4.5 4.6 4.7 4.8	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strateg - Develop Layouts and Furniture Vision a. Electronic presentation and presentation boards b. Charette (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent <u>Pre-Application</u> package 	BW FFA/PAE ALL FFA, BW/MR prep FFA BW BW BW PAE AP led process AP/FFA/Vega/MR	
4.2 4.3 4.4 4.5 4.6 4.7 4.8	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Turniture Design - Develop Layouts and Furniture Vision a. Electronic presentation and presentation boards b. Charette (4 hrs) Eurniture Design - Develop Layouts and Furniture Vision a. Electronic presentation and presentation boards b. Charette (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent Pre-Application with City of Portland a. Pre-Application conference 	BW FFA/PAE ALL FFA, BW/MR prep FFA BW BW PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP	
4.2 4.3 4.4 4.5 4.6 4.7 4.8 4.9	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Eurniture Design, - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent Pre-Application package b. Pre-application notes response 	BW FFA/PAE ALL FFA, BW/MR prep FFA BW BW BW PAE AP led process AP/FFA/Vega/MR	
4.2 4.3 4.4 4.5 4.6 4.7 4.8 4.9	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Treferred Option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent Pre-Application package b. Pre-application conference c. Pre-application notes response 100% Schematic Design Package - Assume alternates are included 	BW FFA/PAE ALL FFA, BW/MR prep FFA BW BW PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP	
4.2 4.3 4.4 4.5 4.6 4.7 4.8 4.9	 c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC; Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Eurniture Design, - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model) Define scope of work for PP&R to select Commissioning Agent Pre-Application package b. Pre-application notes response 	BW FFA/PAE ALL FFA, BW/MR prep FFA BW BW PAE AP led process AP/FFA/Vega/MR FFA/Vega/AP	

4.12	Include preliminary LEED Scorecard and high performances measures c. Cost Estimate d. Design and Construction Schedule e. Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report Present SD package to Owner's staff Plan Review Meeting with Owner's staff a. Track comments and provide A/E response Community Presentation (Public Involvement Plan Presentation #1) a. Prepare renderings and presentation materials b. Community input summary report	RLB/team review FFA FFA/PAE/Vega ALL FFA/MR FFA Hours Rate Fee	2 4 \$115 \$460			\$	460.00
	Design Development (35% CDs) (RFP Tasks 6, 7, & 8)					14 wks + 2 wks owne	r review
	Meetings: a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions) b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour) A/E Revit model updates due bi-weekly (prior to coordination meeting MEP System Selection (RFP Task 7)	Core design team r PAE led process	egularly, other o	onsultants as needec			
	 a. MEP Systems Focus Group Meeting with PP&R b. Develop Energy Conservation Measures table Energy Life-Cycle Cost Analysis Life-cycle cost energy savings evaluation / c. Energy Conservation Measures MEP systems Energy Life-Cycle Cost Analysis / Energy conservation 						
	d. opportunities e. Energy Model update based on selected systems, LEED input f. MEP Systems Selection Package Draft Report g. Owner review and comment, A/E response						
5.2	 Systems. Equipment, and Materials Review Meetings (RFP Task 8.10) Building Exterior Materials Presentation and Owner Review Meeting Plumbing Fixture Package (cutsheets) and Owner Review Meeting Security, A/V, and Technology Systems Package and Owner Coordination Review Meeting Lighting and Energy Management Package and Owner Review Meeting Interior Finishes Presentation and Owner Review Meeting Track, respond, and incorporate owner comments for each meeting 						
5.3	50% Design Development Progress Package - Not priced - coordination only a. Drawings b. Outline Specifications	All team					
	Attach system and material packages Include draft envelope testing and commissioning requirements c. Outline of furniture specifications and proposed color boards d. Cost estimate in CSI format e. Updated Design & Construction Schedule f. Assemble package g. Quality Assurance Review	PAE MH/PAE/BW FFA RLB/team review					
5.4	Progress review meeting with the Owner's Project Manager	FFA					
5.5	Owner review and comments. A/E track and provide response Value Engineering, as required (REP Task 8.8)						
	 Value Engineering, as required (KFP Task 5.8, Land Use Review - Assumed Type III Review (RFP Task 6) a. Neighborhood meeting (Public Involvement Plan Presentation #2) 1. Notification and presentation materials for Neighborhood meeting 2. Neighborhood meeting 3. Attendance list and meeting notes b. Land Use Package 	6-12 months FFA FFA/AP/MR AP AP					
57	 Development, Draft Report, internal review (Including support drawings, tree plan, reports, and materials board) Final Package & Submittal Public Hearing Public Works Permit (PWP) Process 	All team Vega submitting	4				
5.7		voga subminnly					

5.10.	 a. Submit PWP Concept package b. AHJ Package Review meeting 100% Design Development Package (35% Construction Documents) a. Drawings (RFP Task 8.11) b. Specifications c. Cost Estimate d. Quality Assurance review and checklists e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab) Performance Tracking Report Update (RFP Task 8.12) a. LED & Green Building Policy Checklists b. Energy Model update based on selected systems c. Life-Cycle Cost Analysis Update Plan Review Meeting with Owner's staff a. Track comments and provide A/E response 	RLB/team review All team FFA/PAE 4 Hours 8 Rate \$115 Fee \$920	\$	920.00
	Construction Documents (RFP Task 9)		18 weeks	
6.0.	Meetings a. Owner-Architect Meeting b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly - 1 hour) A/E Revit model updates due bi-weekly (prior to coordination meeting)	Core design team regularly, other consultants as needed		
6.1	Public Works Permit (PWP) Process a. Submit PWP Design package b. AHJ Package Review meeting			
6.2	75% CD Progress Package (RFP Task 9.1) a. Drawings			
	 b. Specifications c. Updated Performance Tracking Reports LEED & Green Building Policy Checklists Energy Model based on selected systems (PAE confirm timing) Life-Cycle-Cost Analysis d. Preliminary Calculations 			
	e. Cost Estimate f. Design & Construction Schedule g. Final Update finishes board (interior and exterior) h. Issue Tracking log	RLB/team review		
6.3	i. Quality Assurance - copy of redline sel Plan Review Meeting with Owner Team (RFP Task 9.1.18.2) a. Track, respond, and incorporate owner comments	FFA		
6.4	<u>Systems, Equipment, and Materials Update</u> (RFP Task 8.10) a. Building Exterior Materials Presentation and Owner Review Meeting			
	 b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting Security, A/V, and Technology Systems Package and Owner Review c. Meeting d. Lighting and Energy Management Package and Owner Review Meeting e. Interior Finishes Presentation and Owner Review Meeting f. Track, respond, and incorporate owner comments for each meeting 			
6.5	<u>95% CD Progress Package</u> (RFP Task 9.2) a. Drawings b. Specifications (incorporating LEED lists and list of O&M requirements) c. Full Design Calculations d. Quality Assurance review			
	 e. List identifying anticipated long lead items (9.2.5) Plan Review Meeting with Owner Team (9.2.7.2) a. Track, respond, and incorporate owner comments 	FFA/PAE		
6.8	Public Works Permit (PWP) Process a. Submit PWP Final package b. AHJ Package Review meeting			
6.9	100% Construction Documents ¹ Permit Submittal to PP&R PM a. Stamped Drawings b. Stamped Specifications c. Stamped Final Design Calculations	All Team 2		

6.10.	 d. Updated Cost Estimate e. Permit Application Forms and support documentation Owner review and approval 	RLB/team review			
		Hours Rate Fee	2 \$115 \$230	\$	230.00
Task 7	Permitting and Bidding (RFP Task 10)				
7.0.	Owner-Architect Update Meetings (monthly)				
7.1	Permitting				
	a. Submit for Permitb. Permit check sheet responses and tracking				
7.2	Bidding				
1.2	a. Prepare Bid Set Documents				
	b. Pre-Bid Conference				
	c. Bid Phase A/E Services				
	Value-Engineering and reissuance (if all bids exceed cost estimate by 20%				
7.4	Public Works Permit (PWP) Process				
75	a. Submit Final Vellum package LEED Design Phase Review/Complete LEED Documentation				
7.5	LEED Design Phase Review/Complete LEED Documentation	Lister			
		Hours Rate	0 \$115		
		Fee	\$115	\$	-
	Construction Administration (RFP Task 11)			~12-18 mo.	
8.0.	Meetings a. Pre-Construction Meetings				
	a. Pre-Construction Meetings 1. Contractor Kick-off Pre-construction Meeting		2		
	2. LEED Pre-construction Meeting		2		
	3. Specialty and System Pre-construction Meetings				
	b. Owner-Architect-Contractor Meetings: Weekly				
	Site Visits and Observation Reports - four times per month min. 2x per		•		
	 c. month min. (by A/E team - not each consultant) d. Client/Vendor Furniture coordination meetings (five meetings) 		8		
	e. LEED update meetings (every 4-6 weeks 9 meetings)				
8.1	Construction Administration Services (RFP Tasks 11.4-11.7)				
	a. Submittals				
	b. RFIs/ASI's/PCOs				
	c. Certification of Payment Applications d. Changes, CO/PCO/CCD for owner review				
	e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.)				
	Envelope testing	MH/FFA			
	a. Mock up Reviews				
0.0	b. Window Testing				
8.3	Furnishing Installation Punch List Observations (review of Vendors punch list and furnishings outside of vendors purview)	FFA			
8.4	Testing and Balancing (Commissioning agent coordination in Task 9				
	a. Attend Equipment or System Start up/Testing				
	b. Testing and balancing observations and Test Data Reviews				
8.5	Substantial Completion Process	All Team			
	 a. Review General Contractor issued substantial completion punch list b. A/E Punch List Observations and Reports 				
	c. Back punch walk of contractor completed punch list				
	d. Issue Certificate of Substantial Completion				
8.6	Certificate of Occupancy				
		Hours	10		
		Rate	\$115		4 450 00
		Fee	\$1,150	\$	1,150.00

Task 9 Commissioning and LEED Submission(RFP Task 13) 9.0. A/E coordination of owner provided Commissioning and Testing a. Attend commissioning meetings (minimum of five meetings) b. A/E coordination with owner provided Commissioning Agent c. Testing and balancing observations and Test Data Reviews see 8.4 b.

- 9.1 LEED Submission a. LEED Construction-Phase and Final Certification Review
 - b. LEED Submission

		Hours Rate Fee	0 \$115 \$0	5		\$ -
Task 10	Project Closeout (RFP Task 11 & 14)				1 mo.	
10.1 10.2 10.3	Asset Management Plan - Review contractor and Praxis deliverables a. Review Plan and evaluate maintenance and life-cycle informatior b. Review Facility Information Model (FIM) <u>Final Completion Observations</u> (RFP 14.6) a. Two (2) comprehensive punch list closeout observations and updates Furnishing Final Completion Observation and Closeoul	Praxis PAE/FFA/MH PAE/FFA/MH ALL TEAM	1	1		
10.4	Project Closeout Documents (RFP 14.7) a. Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models Reproducible Record Drawings (PDF) b. Operations & Maintenance Manual and closeout document reviews	ALL TEAM				
	c. Close out coordination	FFA				
10.5	Issue Final Payment after owner final acceptance	FFA				
		Hours Rate Fee	1 \$115 \$115			\$ 115.00
					TOTAL FEES	\$ 4,600.00
	_					
EX	Expenses Total Expenses	No Additional				
		No Additional			Contract Total	\$ 4,600.00

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team

				PBS Envir	onmental										
						vironmental	Engineers	3							
					Principal Geotechnica I Engineer	Senior Geotechnica I Engineer /Enor VII)	-		Project Geologist I	Project Administrato r II	Role	Role	Role	Duration	Subtotals
			Rate	\$110	\$225	\$180	\$150	\$110	\$105	\$95	\$100	\$100	\$100		
Task 1 1.1 1.2 1.3	Project Initiation Detailed Work Plan, Design Program, & Fee (In progress) a. Scope of Work b. Schedule c. Detailed Workplan with Fee Client Kick-off Meeting (PP&R + FFA) A/E Team Kick-off Meeting (1-hour meeting)	FFA All Team FFA All Team FFA All Team	Hours Rate Fee	0 \$110 \$0	0 \$225 \$0	0 \$180 \$0	0 \$150 \$0	0 \$110 \$0	0 \$105 \$0	\$95	\$100	0 \$100 \$0	0 \$100 \$0	\$	
Task 2	Pre-Design Assessment (RFP Tasks 2 & 4)													~6 wks	
2.1. 2.2. 2.3. 2.4. 2.5. 2.6. 2.7. 2.7. 2.7. 2.8 2.9 2.10.	Review PP&R provided facility information Develop/Distribute base plans and templates Conduct Assessment Site Visits (1 visit + 1 followup) A/E Team Coordination Meetings (Three, 1-hour each) Building Assessment Report - Areas to remain (RFP Task 2) a. Structural Investigations b. Code research and analysis c. Document existing conditions d. Deficiencies / Opportunties and Constraints e. Building Assessment Report Site Survey (RFP Task 4) a. Private Utility Locates for sitework b. Site survey (Full park site property lines and trees) Site Investigations & Assessment a. Site, zoning, and regulatory research and analysis b. Geotechnical exploration and report c. Hazardous Materials Assessment and Abatement Desigr d. Tree Assessment Report Quality Assurance Review Revisions and Issue Electronic Draft Reports Review with Owner and Track comments	Core desig ABHT KPFF ALL TEAM Vega, PAE PBS Vega PTC/MR	1	+ PBS 40	14	32	20	76	40	16				~4 wks	
2.11	Incorporate Owner Comments & Issue Final Reports		Hours Rate Fee	40 \$110 \$4,400	14 \$225 \$3,150	32 \$180 \$5,760	20 \$150 \$3,000	76 \$110 \$8,360	40 \$105 \$4,200	\$95	\$100	0 \$100 \$0	0 \$100 \$0	\$	30,390.00
Task 3	9 Pre-Design Framework (RFP Task 3)			_			_	_	_	_				~6 wks	
			Hours Rate Fee	0 \$110 \$0	0 \$225 \$0	0 \$180 \$0	0 \$150 \$0	0 \$110 \$0	0 \$105 \$0	\$95	\$100	0 \$100 \$0	0 \$100 \$0	\$	-
Task 4	Schematic Design (RFP Tasks 5 & 6)													~3.5 mo	

12.21.2020 DRAFT

		Hours Rate Fee	0 \$110 \$0	0 \$225 \$0	0 \$180 \$0	0 \$150 \$0	0 \$110 \$0	0 \$105 \$0	0 \$95 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$	-
Task 5 Design Development (35% CDs) (RFP Tasks 6, 7, & 8)													~3.5 mo	
		Hours Rate Fee	0 \$110 \$0	0 \$225 \$0	0 \$180 \$0	0 \$150 \$0	0 \$110 \$0	0 \$105 \$0	0 \$95 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$	-
Task 6 Construction Documents (RFP Task 9)													~4.5 mo	
		Hours Rate Fee	0 \$110 \$0	0 \$225 \$0	0 \$180 \$0	0 \$150 \$0	0 \$110 \$0	0 \$105 \$0	0 \$95 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$	-
Task 7 Permitting and Bidding (RFP Task 10)														
		Hours Rate Fee	0 \$110 \$0	0 \$225 \$0	0 \$180 \$0	0 \$150 \$0	0 \$110 \$0	0 \$105 \$0	0 \$95 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$	-
Task 8 Construction Administration (RFP Task 11)													~18 mo	
 8.0. <u>Meetings</u> Pre-Construction Meetings Contractor Kick-off Pre-construction Meeting LEED Pre-construction Meeting Speciality and System Pre-construction Meetings Owner-Architect-Contractor Meetings: Weekly Site Visits and Observation Reports - four times per month min. (weekly) Client/Vendor Furniture coordination meetings (five meetings LEED update meetings (every 4-6 weeks) 8.1 <u>Construction Administration Services</u> (RFP Tasks 11.4-11.7) Submittals RFIs/ASI's/PCOs Certification of Payment Applications Changes, CO/PCO/CCD for owner review Owner's Consultant Coordination: Commissioning/Vendors (RFP Task e. 11.10.) <u>Envelope testing</u> Mock up Reviews Window Testing 8.3 Furnishing Installation Punch List Observations: (review of Vendors punchlist and furnishings outside of vendors purview) 8.4 <u>Testing and Balancing</u> (Outside of commissioning) (RFP Task 14.4-5) Attend Equipment or System Start up/Testing Testing and balancing observations and Test Data Reviews 8.5 <u>Substantial Completion Process</u> Review General Contractor issued substantial completion punchlis A/E Punch List Observations and Reports Backpunch walk of contractor completed punch list Issue Certificate of Substantial Completior 	MH/FFA FFA All Team	Hours			0		0	0			0	0		
		Rate Fee	0 \$110 \$0	0 \$225 \$0	\$180 \$0	0 \$150 \$0	\$110 \$0	\$105 \$0	0 \$95 \$0	0 \$100 \$0	\$100 \$0	\$100 \$0	\$	-
Task 9 Commissioning and LEED Submission (RFP Task 13)														
		Hours Rate Fee	0 \$110 \$0	0 \$225 \$0	0 \$180 \$0	0 \$150 \$0	0 \$110 \$0	0 \$105 \$0	0 \$95 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$0 \$	-

Task 10 Project Closeout (RFP Task 11 & 14)											1	l mo		
	Hours Rate Fee	0 \$110 \$0	0 \$225 \$0	0 \$180 \$0	0 \$150 \$0	0 \$110 \$0	0 \$105 \$0	0 \$95 \$0	0 \$100 \$0	0 \$100 \$0	0 \$100 \$0	\$0	\$	-
										ΤΟΤΑ	L FEES		\$	30,390.00
EX Expenses														
Geotechnical Services Labortory Testing Geotechnical Subcontractors													\$ \$	3,300.00 20,000.00
									٦	TOTAL EXF	ENSES		\$	23,300.00

 SS
 Optional Supplimental Services

 SS-1
 Community Engagement Workshop (Preparation and workshop JLA Led Process with A/E team support - Add to Task 3 Workshop with the community about the Vision and programming of Mt. Scott

SS-2 Recreational and Operational Needs Study (Ballard*King) Add to Task 2

SS-3 Pool and pool equipment - upgrades, repairs, or assessment (WTI)

SS-4 Acoustic Engineering - incorporate into core services

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team Updated 4.12.2021		
	Angelo Planning Group Land Use Planner	
	Rate \$231 \$90	nution O Subtotals
Task 1 Project Initiation 1.1 Detailed Work Plan, Design Program, & Fee (In progress)	FFA	
a. Scope of Work	All Team	
b. Schedule c. Detailed Workplan with Fee	FFA All Team	
1.2 Client Kick-off Meeting (PP&R + FFA)	FFA	
1.3 A/E Team Kick-off Meeting (1-hour meeting)	All Team	
	Hours 0 0 Rate \$231 \$90 Fee \$0 \$0	\$ -
Task 2 Pre-Design Assessment (RFP Tasks 2 & 4)		4-6 wks
2.1. Review PP&R provided facility information		
 2.2. Develop/Distribute base plans and templates 2.3. Conduct Assessment Site Visits (1 visit + 1 follow-up) 		
2.4. A/E Team Coordination Meetings (Three, One, 1-hour each)		
2.5. Building Assessment Report - Areas to remain (RFP Task 2)	Core design team + PBS	
 a. Structural Investigations b. Code research and analysis 	ABHT	
c. Document existing conditions		
d. Hazardous Materials Assessment- Confirm scope, see existing PPR repo		
e. Building Assessment Report		
2.6. Site Survey (RFP Task 4)	KPFF	
 a. Private Utility Locates for sitework b. Site survey (Full park site property lines and trees) 		
2.7. Site Investigations & Assessment	ALL TEAM	
a. Site, zoning, and regulatory research and analysis	Vega, PAE, FFA	
 b. Geotechnical exploration and report c. Stormwater Management Assessment (SWMM) 	PBS Vega	
d. Tree Assessment Survey & Report	PTC/MR	
e. Site Assessment Report 2.8 Quality Assurance Review		
2.9 Revisions and Issue Electronic Draft Reports		
2.10. Review with Owner and Track comments 2.11 Incorporate Owner Comments & Issue Final Reports	FFA	
	Hours 0 0	
	Rate \$231 \$90	
		\$ -

FFA/PAE/BW

Task 3 Pre-Design | Framework (RFP Task 3)

3.0. Meetings

Resilience/ Eco and High-Performance Goal setting workshops (Two 3-hour

a. meetings)

6 wks - overlaps with task 2

3.1	 a. Whole Building Energy Performance b. Site and Irrigation c. Structural Engineering d. Building Enclosure/Envelope e. Interior Systems - Construction Products and Finish Materials. f. Mechanical Engineering g. Lighting Design - Interior and Exterior h. Electrical Engineering i. Quality Assurance Review j. Draft Outline Building Performance Strategies a. Meeting with PP&R Operations - systems discussion 	BW/PAE/FFA/MR Core design team y SEE NPB Design Guide PAE, FFA, BW Vega/MR ABHT FFA/MH/BW FFA/BW PAE PAE PAE PAE PAE	
	 b. Facilities Management focus group - FIM requirements c. High-Performance Building Plan Strategy options d. Quality Assurance Review e. Draft Strategies 	FFA/PAE/Praxis	
3.3	LEED Owner's Project Requirements (OPR) Development a. OPR Follow-up Meetings b. OPR Summary Draft		
3.4	Program Refinement a. Tour similar facilities in the region with stakeholders (Two half day tours) b. Community Engagement - Values and Programming c. Focus Group Meetings (Spatial, MEP, & FF&E requirements) d. Quality Assurance Review e. Draft Summary	FFA FFA/BW/MR FFA/PAE	
3.5	Review with Owner and Track comments Incorporate Owner Comments & Issue Final Reports	FFA All team Hours 0 0 Rate \$231 \$90 Fee \$0 \$0	\$ -
Task 4	Schematic Design (RFP Tasks 5 & 6)		12 wks + 2 wks owner review
Task 4.0	Schematic Design (RFP Tasks 5 & 6) <u>Meetings</u> a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation	Core design team regularly, other consultants as needec	12 wks + 2 wks owner review
	Meetings a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates	Core design team regularly, other consultants as needec	12 wks + 2 wks owner review
4.0	Meetings a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies	Core design team regularly, other consultants as needec BW FFA/PAE	12 wks + 2 wks owner review
4.0 4.1 4.2 4.3	Meetings a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept	Core design team regularly, other consultants as needec BW FFA/PAE ALL	12 wks + 2 wks owner review
4.0 4.1 4.2	Meetings a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentatior Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction	Core design team regularly, other consultants as needec BW FFA/PAE ALL	12 wks + 2 wks owner review
4.0 4.1 4.2 4.3 4.4 4.5	Meetings a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentatior Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two; Preferred option (4 hours) a. Electronic presentation and presentation boards	Core design team regularly, other consultants as needec BW FFA/PAE ALL	12 wks + 2 wks owner review
4.0 4.1 4.2 4.3 4.4 4.5 4.6	Meetings a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentatior Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two; Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Design Charrette Two; Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) a. Electronic presentation and presentation boards b. Charette (4 hrs) a. Electronic presentation and presentation boards b. Charette (4 hrs) Eurniture Design, - Develop Layouts and Furniture Vision </th <th>Core design team regularly, other consultants as needec BW FFA/PAE ALL FFA, BW/MR prep FFA</th> <th>12 wks + 2 wks owner review</th>	Core design team regularly, other consultants as needec BW FFA/PAE ALL FFA, BW/MR prep FFA	12 wks + 2 wks owner review
4.0 4.1 4.2 4.3 4.4 4.5	Meetings a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentatior Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Design Charrette Two: Preferred option (4 hours) a. Client Meeting - Review furniture layout options / select preferred optior b. Charette (4 hrs) Furniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance	Core design team regularly, other consultants as needec BW FFA/PAE ALL FFA, BW/MR prep FFA BW BW	12 wks + 2 wks owner review
4.0 4.1 4.2 4.3 4.4 4.5 4.6 4.7	Meetings a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentatior Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs) Develop Preferred Concept Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) Design Charrette Two: Preferred option (4 hours) a. Electronic presentation and presentation boards b. Charette (4 hrs) Turniture Design - Develop Layouts and Furniture Vision a. Client Meeting - Review furniture layout options / select preferred optior b. Furniture Visioning Meeting with client and track comments Performance Tracking Reports for Certification/Green Design Requirements	Core design team regularly, other consultants as needec BW FFA/PAE ALL FFA, BW/MR prep FFA BW	12 wks + 2 wks owner review

	a. Pre-Application package	AP/FFA/Vega/MR	
	b. Pre-application Conference	FFA/Vega/AP	
	c. Pre-application notes response	ALL TEAM	
4.10.	100% Schematic Design Package - Assume alternates are included		
	a. Drawings		
	b. Outline Specification & Narratives		
	Include preliminary LEED Scorecard and high performances measures c. Cost Estimate		
	d. Design and Construction Schedule	RLB/team review	
	e. Preliminary FF&E list and costs		
	f. Assemble package		
	g. Quality Assurance review and checklists		
	h. Revisions and Issue Report		
4.11	Present SD package to Owner's staff	FFA	
	Plan Review Meeting with Owner's staff	FFA/PAE/Vega	
	a. Track comments and provide A/E response	ALL	
4.13	Community Presentation (Public Involvement Plan Presentation #1)		
	 Prepare renderings and presentation materials 	FFA/MR	
	 b. Community input summary report 	FFA	
		Hours 0 0	
		Rate \$231 \$90	
		Fee \$0 \$0	\$ -
Task 5	Design Development (35% CDs) (RFP Tasks 6, 7, & 8)		14 wks + 2 wks owner review
	Meetings:		
	a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions)		
	b. Client/Vendor Furniture coordination meetings (five meetings)		
	c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour	Core design team regularly, other consultants as needec	
	A/E Revit model updates due bi-weekly (prior to coordination meeting)		
5.1	MEP System Selection (RFP Task 7)	PAE led process	
	a. MEP Systems Focus Group Meeting with PP&R		
	b. Develop Energy Conservation Measures table Energy Life-Cycle Cost Analysis Life-cycle cost energy savings evaluation /		
	c. Energy Conservation Measures		
	MEP systems Energy Life-Cycle Cost Analysis / Energy conservation		
	d. opportunities		
	e. Energy Model update based on selected systems, LEED input		
	f. MEP Systems Selection Package Draft Report		
	g. Owner review and comment, A/E response		
5.2	Systems, Equipment, and Materials Review Meetings (RFP Task 8.10)		
	a. Building Exterior Materials Presentation and Owner Review Meeting		
	 Plumbing Fixture Package (cutsheets) and Owner Review Meeting Security, A/V, and Technology Systems Package and Owner Coordination 		
	c. Review Meeting		
	d. Lighting and Energy Management Package and Owner Review Meeting		
	e. Interior Finishes Presentation and Owner Review Meeting		
	f. Track, respond, and incorporate owner comments for each meeting		
5.3	50% Design Development Progress Package - Not priced - coordination only	All team	
	a. Drawings		
	b. Outline Specifications		
	Attach system and material packages	PAE	
	Include draft envelope testing and commissioning requirements c. Outline of furniture specifications and proposed color boards	MH/PAE/BW FFA	
	d. Cost estimate in CSI format	RLB/team review	
	e. Updated Design & Construction Schedule		
	f. Assemble package		
	g. Quality Assurance Review		
5.4	Progress review meeting with the Owner's Project Manager	FFA	
	Owner review and comments. A/E track and provide response		
5.5	Value Engineering, as required (RFP Task 8.8)		
5.6	Land Use Review - Assumed Type III Review (RFP Task 6)	6-12 months	

	a. Neighborhood meeting (Public Involvement Plan Presentation #2)		8	12			
	1. Notification and presentation materials for Neighborhood meeting	FFA					
	2. Neighborhood meeting	FFA/AP/MR					
	 Attendance list and meeting notes Land Use Package 	AP AP	40	120			
	1. Development, Draft Report, internal review	All team	40	120			
	(Including support drawings, tree plan, reports, and materials board	Airteann					
	2. Final Package & Submittal						
	c. Public Hearing		8	8			
5.7	Public Works Permit (PWP) Process	Vega submitting					
	a. Submit PWP Concept package						
	 AHJ Package Review meeting 						
5.8	100% Design Development Package (35% Construction Documents)						
	a. Drawings (RFP Task 8.11)						
	b. Specifications						
	c. Cost Estimate	RLB/team review					
	d. Quality Assurance review and checklists	A.U. (
F ^	e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)	All team					
5.9	Performance Tracking Report Update (RFP Task 8.12)						
	a. LEED & Green Building Policy Checklists b. Energy Model update based on selected systems						
	c. Life-Cycle Cost Analysis Update						
5.10.	Plan Review Meeting with Owner's staff	FFA/PAE					
	a. Track comments and provide A/E response						
		Hours	56	140			
		Rate	\$231	\$90			
		Fee	\$12,936	\$12,600		\$	25,
	Construction Documents (RFP Task 9)					18 weeks	
6.0.	Meetings						
	a. Owner-Architect Meeting						
	 Client/Vendor Eurniture coordination meetings (five meetings) 						
	 b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly - 1 hour) 	Core design team re	equilarity of	her consultants as needed			
	c. A/E team coordination meeting (bi-weekly - 1 hour)	Core design team re	egularly, ot	her consultants as needec			
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	a. Drawings						
	b. Specifications (incorporating LEED lists and list of O&M requirements)						
	c. Full Design Calculations						
	d. Quality Assurance review						
	e. List identifying anticipated long lead items (9.2.5)						
6.7	Plan Review Meeting with Owner Team (9.2.7.2)	FFA/PAE					
	a. Track, respond, and incorporate owner comments						
6.8	Public Works Permit (PWP) Process						
	a. Submit PWP Final package						
0.0	 b. AHJ Package Review meeting 100% Construction Documents/ Permit Submittal to PP&R PM 	All Team					
6.9	a. Stamped Drawings	All Team					
	 a. Stamped Drawings b. Stamped Specifications 						
	c. Stamped Final Design Calculations d. Updated Cost Estimate	RLB/team review					
	e. Permit Application Forms and support documentation	RLD/lean review					
6 10	Owner review and approval						
0.10.		Llauma		•			
		Hours Rate	0 \$231	0 \$90			
		Fee	\$∠31 \$0	\$90 \$0		\$	_
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Task 7	' Permitting and Bidding (RFP Task 10)						
7.0.	Owner-Architect Update Meetings (monthly)						
7.1	Permitting						
	a. Submit for Permit						
	 Permit check sheet responses and tracking 						
7.2	Bidding						
	a. Prepare Bid Set Documents						
	b. Pre-Bid Conference						
	c. Bid Phase A/E Services						
7.3	Value-Engineering and reissuance (if all bids exceed cost estimate by 20%						
7.4	Public Works Permit (PWP) Process						
	a. Submit Final Vellum package						
7.5	LEED Design Phase Review/Complete LEED Documentation						
		Hours	0	0			
		Rate	\$231	\$90		•	
		Fee	\$0	\$0		\$	-
Tack	Construction Administration (RFP Task 11)					~12-18 mo.	
	Meetings					~12-16 110.	
0.0.	a. Pre-Construction Meetings						
	1. Contractor Kick-off Pre-construction Meeting						
	2. LEED Pre-construction Meeting						
	3. Specialty and System Pre-construction Meetings						
	,						

b. Owner-Architect-Contractor Meetings: Weekly

Site Visits and Observation Reports - four times per month min. 2x per

- c. month min. (by A/E team not each consultant)
- d. Client/Vendor Furniture coordination meetings (five meetings)
- e. LEED update meetings (every 4-6 weeks 9 meetings)
- 8.1 Construction Administration Services (RFP Tasks 11.4-11.7)
 - a. Submittals
 - b. RFIs/ASI's/PCOs
 - c. Certification of Payment Applications
 - d. Changes, CO/PCO/CCD for owner review
 - e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.)
 - Envelope testing
 - a. Mock up Reviews
 - b. Window Testing

MH/FFA

FFA

- 8.3 Furnishing Installation Punch List Observations (review of Vendors punch list and furnishings outside of vendors purview)
- 8.4 Testing and Balancing (Commissioning agent coordination in Task 9)

8.5 <u>\$</u> 8.5 <u>\$</u> 2 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	 a. Attend Equipment or System Start up/Testing b. Testing and balancing observations and Test Data Reviews <u>Substantial Completion Process</u> a. Review General Contractor issued substantial completion punch list b. A/E Punch List Observations and Reports c. Back punch walk of contractor completed punch list d. Issue Certificate of Substantial Completion 	All Team					
		Hours Rate Fee	0 \$231 \$0	0 \$90 \$0		\$	-
Task 9 0	Commissioning and LEED Submission(RFP Task 13)						
9.0. A a b 9.1 L a	A/E coordination of owner provided Commissioning and Testing a. Attend commissioning meetings (minimum of five meetings) b. A/E coordination with owner provided Commissioning Agent c. Testing and balancing observations and Test Data Reviews see 8.4 b. EED Submission a. LEED Construction-Phase and Final Certification Review b. LEED Submission						
		Hours Rate Fee	0 \$231 \$0	0 \$90 \$0		\$0 \$	-
	Project Closeout (RFP Task 11 & 14)				1 m	10.	
a 10.2 <u>F</u> 10.3 F	Asset Management Plan - Review contractor and Praxis deliverables a. Review Plan and evaluate maintenance and life-cycle informatior b. Review Facility Information Model (FIM) <u>Final Completion Observations</u> (RFP 14.6) a. Two (2) comprehensive punch list closeout observations and updates Furnishing Final Completion Observation and Closeout	Praxis PAE/FFA/MH PAE/FFA/MH ALL TEAM					
	<u>Project Closeout Documents (RFP 14.7)</u> a. Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models Reproducible Record Drawings (PDF)	ALL TEAM					
c	 Operations & Maintenance Manual and closeout document reviews Close out coordination 	ALL TEAM FFA					
10.5	ssue Final Payment after owner final acceptance	FFA Hours Rate Fee	0 \$231 \$0	0 \$90 \$0		\$0 \$	-
					TOTAL FEES	\$	25,536.00
EX E	Expenses						
	List expenses here and manually add amount to end of row)					\$	-

Contract Total \$ 25,536.00

Mt. Scott Community Center WORKPLAN and FEES Portland Parks and Recreation FFA Architecture and Interiors Team Updated 4.9.2021 -- Brightworks revisions 4/13/21

Update	14.9.2021 Brightworks revisions 4/13/21			r ightwor l ustainabil	ks Sustai ity	nability							
			Role Rate	\$200	Sr. Project \$ 081 08	Materials \$ 00 Specialist	Materials \$ 091\$	Sr. Energy	081 081	Project Coordinator 011	Duration	Subt	otals
1.1	Project Initiation Detailed Work Plan, Design Program, & Fee (In progress) a. Scope of Work b. Schedule c. Detailed Workplan with Fee Client Kick-off Meeting (PP&R + FFA) A/E Team Kick-off Meeting (1-hour meeting)	F	ours Rate	0 \$200	6 6 1 13 \$180	5 5 9 \$16		0	0 \$180	0 \$110			
			Fee	\$0	\$2,340) 4	60	\$0	\$0	\$0	\$		2,340.00
	Pre-Design Assessment (RFP Tasks 2 & 4)										4-6 wks		
	Review PP&R provided facility information												
	Develop/Distribute base plans and templates												
2.3. 2.4.	Conduct Assessment Site Visits (1 visit + 1 follow-up) A/E Team Coordination Meetings (Three, One, 1-hour each)				1								
	Building Assessment Report - Areas to remain (RFP Task 2) a. Structural Investigations	Core design to ABHT	eam +	PBS	ľ								
	b. Code research and analysis												
	c. Document existing conditions												
	d. Hazardous Materials Assessment- Confirm scope, see existing PPR reports												
	e. Building Assessment Report												
2.6.		KPFF											
	a. Private Utility Locates for sitework												
0.7	b. Site survey (Full park site property lines and trees)												
2.7.	Site Investigations & Assessment a. Site, zoning, and regulatory research and analysis	ALL TEAM Vega, PAE, F	FΔ		1								
	 b. Geotechnical exploration and report 	PBS											
	c. Stormwater Management Assessment (SWMM)	Vega											
	d. Tree Assessment Survey & Report	PTC/MR											
20	e. Site Assessment Report Quality Assurance Review												
2.8 2.9	Revisions and Issue Electronic Draft Reports												
2.10.	Review with Owner and Track comments	FFA											
2.11	Incorporate Owner Comments & Issue Final Reports												
			ours	0	2		0	0	0	0			
			Rate Fee	\$200 \$0	\$180 \$360			160 \$0	\$180 \$0	\$110 \$0	\$		360.00
	Pre-Design Framework (RFP Task 3)										6 wks - ove	erlaps with	n task 2
3.0.	Meetings Resilience/ Eco and High-Performance Goal setting workshops (Two 3-hour												
	a. meetings)	FFA/PAE/BW			6				6				
	 b. LEED Owner's Project Requirements (OPR) Kick-off meeting c. A/E coordination meetings (Four 1-hour each) 	BW/PAE/FFA Core design to			2 4				4				

3.1 Building Performance Workshop Summary (includes resilience and sustainability SEE NPB Design Guide

3.2	 a. Whole Building Energy Performance b. Site and Irrigation c. Structural Engineering d. Building Enclosure/Envelope e. Interior Systems - Construction Products and Finish Materials. f. Mechanical Engineering g. Lighting Design - Interior and Exterior h. Electrical Engineering i. Quality Assurance Review j. Draft Outline Building Performance Strategies a. Meeting with PP&R Operations - systems discussion b. Facilities Management focus group - FIM requirements 	PAE, FFA, BW Vega/MR ABHT FFA/MH/BW FFA/BW PAE PAE PAE PAE PAE PAE		4 1 2 4	2	2	4 2 4		
	 c. High-Performance Building Plan Strategy options d. Quality Assurance Review e. Draft Strategies 								
	LEED Owner's Project Requirements (OPR) Development a. OPR Follow-up Meetings b. OPR Summary Draft						7 6		
3.4	Program Refinement a. Tour similar facilities in the region with stakeholders (Two half day tours) b. Community Engagement - Values and Programming c. Focus Group Meetings (Spatial, MEP, & FF&E requirements) d. Quality Assurance Review e. Draft Summary	FFA FFA/BW/MR FFA/PAE		0					
3.5	Review with Owner and Track comments Incorporate Owner Comments & Issue Final Reports	FFA All team Hours Rate	0 \$200	23 \$180	2 \$160	2 \$160	33 \$180	0 \$110	
		Fee	\$0	\$4,140	\$320	\$320	\$5,940	\$0	\$ 10,720.00
	4 Schematic Design (RFP Tasks 5 & 6)								12 wks + 2 wks owner review
4.0	<u>Meetings</u> a. Owner-Architect meetings (bi-weekly) b. A/E coordination meetings (weekly, 1-hour) c. Preliminary LEED scorecard meeting d. Sustainable Procurement kick-off meeting and documentation	Core design team BW	regularly, (14 8	12	12			
4.1	Develop Three (3) Concept Options a. Site and Building plans b. Shoebox Energy Model for massing concepts COVE tool c. Narratives and LEED strategies d. Cost estimates e. Quality Assurance, revisions, and issue package	FFA/PAE ALL		12 4 6					
4.2	B. Guardy Assurance, revisions, and issue package Design Charrette One: Three design schemes and select preferred a. Electronic presentation and presentation boards b. Charette (4 hrs)	FFA, BW/MR prep	1	8					
	Develop Preferred Concept								
4.4 4.5	Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC) <u>Design Charrette Two:</u> Preferred option (4 hours) a. Electronic presentation and presentation boards	FFA							
4.6	 b. Charette (4 hrs) <u>Furniture Design</u> - Develop Layouts and Furniture Vision Client Meeting - Review furniture layout options / select preferred option 								
4.7	b. Furniture Visioning Meeting with client and track comments <u>Performance Tracking Reports</u> for Certification/Green Design Requirements a. LEED & Green Building Policy Checklists b. Energy Model for system selection (Utilizing Schematic 3D Model)	BW BW PAE		8	8	8		16	
4.8 4.9	Define scope of work for PP&R to select Commissioning Agent <u>Pre-Application</u> with City of Portland a. Pre-Application package b. Pre-application Conference c. Pre-application notes response	AP led process AP/FFA/Vega/MR FFA/Vega/AP ALL TEAM					8		

4.11	100% Schematic Design Package - Assume alternates are included a. Drawings b. Outline Specification & Narratives Include preliminary LEED Scorecard and high performances measures c. Cost Estimate d. Design and Construction Schedule e. Preliminary FF&E list and costs f. Assemble package g. Quality Assurance review and checklists h. Revisions and Issue Report Present SD package to Owner's staff Plan Review Meeting with Owner's staff a. Track comments and provide A/E response	RLB/team			15						
4.13	Community Presentation (Public Involvement Plan Presentation #1)										
	a. Prepare renderings and presentation materials	FFA/MR									
	b. Community input summary report	FFA									
			Hours Rate Fee	0 \$200 \$0	75 \$180 \$13,500	20 \$160 \$3,200	20 \$160 \$3,200	8 \$180 \$1,440	16 \$110 \$1,760	\$ 23	3,100.00
Task 5	Design Development (35% CDs) (RFP Tasks 6, 7, & 8)									14 wks + 2 wks owner	review
5.0.	Meetings: a. Owner-Architect Meeting (Monthly, see 8.15 in descriptions) b. Client/Vendor Furniture coordination meetings (five meetings) c. A/E team coordination meeting (bi-weekly plus 2 extra meetings - 1 hour) A/E Revit model updates due bi-weekly (prior to coordination meeting)	Core desig	n team re	gularly, (9						
5.1	MEP System Selection (RFP Task 7)	PAE led pr	ocess								
	a. MEP Systems Focus Group Meeting with PP&Rb. Develop Energy Conservation Measures table										
	Energy Life-Cycle Cost Analysis Life-cycle cost energy savings evaluation / c. Energy Conservation Measures MEP systems Energy Life-Cycle Cost Analysis / Energy conservation										
	 d. opportunities e. Energy Model update based on selected systems, LEED input 				2						
	f. MEP Systems Selection Package Draft Report				-						
5.2	 g. Owner review and comment, A/E response <u>Systems, Equipment, and Materials Review Meetings</u> (RFP Task 8.10) a. Building Exterior Materials Presentation and Owner Review Meeting b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting Security, A/V, and Technology Systems Package and Owner Coordination 										
	c. Review Meeting										
	 d. Lighting and Energy Management Package and Owner Review Meeting e. Interior Finishes Presentation and Owner Review Meeting 					8	8				
	f. Track, respond, and incorporate owner comments for each meeting					0	0				
5.3	50% Design Development Progress Package - Not priced - coordination only	All team			8	4	4				
	a. Drawings b. Outline Specifications										
	Attach system and material packages	PAE									
	Include draft envelope testing and commissioning requirements	MH/PAE/B	W					6			
	c. Outline of furniture specifications and proposed color boards d. Cost estimate in CSI format	FFA RLB/team	review								
	e. Updated Design & Construction Schedule	rtED/totaini									
	f. Assemble package										
	g. Quality Assurance Review										
5.4	Progress review meeting with the Owner's Project Manager Owner review and comments. A/E track and provide response	FFA									
5.5	Value Engineering, as required (RFP Task 8.8)										
5.6	Land Use Review - Assumed Type III Review (RFP Task 6)	6-12 month	าร								
	 a. Neighborhood meeting (Public Involvement Plan Presentation #2) 1. Notification and presentation materials for Neighborhood meeting 	EEA									
	 Neighborhood meeting 	FFA FFA/AP/MI	R								
	-										

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(review of Vendors punch list and furnishings outside of vendors purview) 8.4 Testing and Balancing (Commissioning agent coordination in Task 9) a. Attend Equipment or System Start up/Testing	8.3		FFA										
a. Attend Equipment or System Start up/Testing		(review of Vendors punch list and furnishings outside of vendors purview)											
b. Testing and balancing observations and Test Data Reviews	d.4												

	Substantial Completion Process a. Review General Contractor issued substantial completion punch list b. A/E Punch List Observations and Reports c. Back punch walk of contractor completed punch list d. Issue Certificate of Substantial Completion Certificate of Occupancy	All Team	Hours Rate Fee	0 \$200 \$0	42 \$180 \$7,560	12 \$160 \$1,920	12 \$160 \$1,920	0 \$180 \$0	106 \$110 \$11,660			\$	23,060.00
			ree	\$U	φ <i>1</i> ,560	\$1,920	φ1,920	Ф О	\$11,000			φ	23,060.00
	Commissioning and LEED Submission(RFP Task 13)												
	 A/E coordination of owner provided Commissioning and Testing a. Attend commissioning meetings (minimum of five meetings) b. A/E coordination with owner provided Commissioning Agent c. Testing and balancing observations and Test Data Reviews see 8.4 b. LEED Submission 												
	a. LEED Construction-Phase and Final Certification Review b. LEED Submission				25	8			40				
			Hours Rate Fee	0 \$200 \$0	25 \$180 \$4,500	8 \$160 \$1,280	0 \$160 \$0	0 \$180 \$0	40 \$110 \$4,400			\$	10,180.00
	Project Closeout (RFP Task 11 & 14)										1 mo.		
10.2 10.3	Asset Management Plan - Review contractor and Praxis deliverables a. Review Plan and evaluate maintenance and life-cycle informatior b. Review Facility Information Model (FIM) Final Completion Observations (RFP 14.6) a. Two (2) comprehensive punch list closeout observations and updates Furnishing Final Completion Observation and Closeoul	Praxis PAE/FFA/N PAE/FFA/N ALL TEAM	ИН		5	2	2						
	Project Closeout Documents (RFP 14.7) a. Record Documents from contractor as-built mark-ups (RFP 14.1) Update Revit Models Reproducible Record Drawings (PDF)	ALL TEAM											
	b. Operations & Maintenance Manual and closeout document reviews	ALL TEAM											
	c. Close out coordination Issue Final Payment after owner final acceptance	FFA FFA											
			Hours Rate Fee	0 \$200 \$0	5 \$180 \$900	2 \$160 \$320	2 \$160 \$320	0 \$180 \$0	0 \$110 \$0			\$	1,540.00
										TOTAL FE	s	\$	111,690.00
= 1	_												
EX	Expenses Total Expenses											\$	1,000.00
												Ψ	1,000.00

Contract Total \$ 112,690.00

<u>Exhibit B</u>

Mt. Scott Community Center Expansion SDC-CIP List Addition

SDC Zone: Non Central City Program: Buildings/Pools Site: Mt Scott Community Center Project Name: Mt Scott Community Center Expansion % Growth: 100% FY: Years 1-5 Funding: \$8,500,000