

Exhibit A – Draft Contract

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): FFA Architecture and Interiors, Inc.Address: 520 SW Yamhill Street, Suite 900, Portland, OR 97204

Business Designation (check one):
 Individual Sole Proprietorship Partnership Corporation
 Limited Liability Co (LLC) Public Service Corp. Government/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) Amendment of the Contract. 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) Minor Amendments to Contract or Change Orders to a Statement of Work. 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.
 - i) 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 officials/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, OSHA, 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

The following attachments are incorporated into this Contract.

- (a) Exhibit a – Statement of Work
 - (b) Exhibit b – Compensation
 - (c) Exhibit c – Consultant' Fee Schedule
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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: Troy Ainsworth, AIA, NCARB
Title: Principal

CONTRACT NUMBER: _____

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

CITY OF PORTLAND SIGNATURES:

By: _____ Date: _____
Bureau Director

By: _____ Date: _____
Chief Procurement Officer

By: _____ Date: _____
Elected Official

Approved:
By: _____ Date: _____
Office of City Auditor

Approved as to Form:
By: _____ Date: _____
Office of City Attorney

Exhibit a – Statement of Work

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: lroark@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 of 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 [Salmon-Safe](#) 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 <https://www.portlandoregon.gov/citycode/?c=34835&a=54355>. To view related City sustainability policies, visit: <https://www.portlandoregon.gov/citycode/index.cfm?&c=26818>.

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 Portland 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:

Exhibit a – Statement of Work

- 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 permissible 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/brrfs/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 Summary
 - 4.8.7.1. 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)
- 6.2. 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

Exhibit a – Statement of Work

- 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

- 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. Updated Life-Cycle Cost Analysis, LEED and Building Energy Modeling: 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. 75% Submittal: 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. 95% Submittal: 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. 100% Submittal Construction (permitting) Documents: 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

- 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 pre-qualification 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

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.

- 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

- 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

- 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.

- 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. Phase 1: 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.

- 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

Exhibit a – Statement of Work

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 CERTIFICATION	SUBCONTRACT 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: <https://www.portlandoregon.gov/brfs/75932>.

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
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

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.

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 Architecture

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Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$180		
Task 1 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	0	0
	Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$0	\$180
	Fee	\$1,680	\$630	\$8,960	\$560	\$420	\$0	\$625	\$0	\$0	\$0
		3.50	1.50	28.00	2.00	1.50	0.00	2.50	0.00	0.00	0.00
										2	\$ 12,875.00
Task 2 Pre-Design Assessment (RFP Tasks 2 & 4)											
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 design team + PBS 2 2										
a.	Structural Investigations ABHT 4 8										
b.	Code research and analysis 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 1										
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 TEAM										
a.	Site, zoning, and regulatory research and analysis Vega, PAE, 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 1										
2.9	Revisions and Issue Electronic Draft Reports 1 2 6 2										
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	0	4
	Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$0	\$180

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Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$180		
Fee	\$240	\$630	\$10,240	\$20,160	\$21,700	\$0	\$1,625	\$810	\$0	\$720	\$ 56,125.00
	0.17	0.50	10.67	24.00	25.83	0.00	2.17	1.50	0.00	0.67	6

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 meetings)	FFA/PAE/BW	6	6	24	32	32		4	4		
a. LEED Owner's Project Requirements (OPR) Kick-off meeting	BW/PAE/FFA/MR	2	2	2	8	2		2	2		
b. A/E coordination meetings (Four 1-hour each)	Core design team		4	8	8	4		2	2		
3.1 Building Performance Workshop Summary (includes resilience and sustainability modeling)	SEE NPB Design Guide										
a. modeling	PAE, FFA, BW				4	2					
b. Site and Irrigation	Vega/MR				2	1					
c. Structural Engineering	ABHT				2	1					
d. Building Enclosure/Envelope	FFA/MH/BW				2	2					
e. Interior Systems – Construction Products and Finish Materials.	FFA/BW				2	2	16	32			
f. Mechanical Engineering	PAE				2	1					
g. Lighting Design – Interior and Exterior	PAE				2	1	8	16			
h. Electrical Engineering	PAE				2	1					
i. Quality Assurance Review		1	1	1	1	1			1		
j. Draft Outline				2	8	4	4	8			
3.2 Building Performance Strategies	PAE/All team										
a. Meeting with PP&R Operations - systems discussion			1	2	4						
b. Facilities Management focus group - FIM requirements	FFA/PAE/Praxis			2	8	4		2	2		
c. High-Performance Building Plan Strategy options				1	4	4					
d. Quality Assurance Review		1	1	2	1				1		
e. Draft Strategies				1	4	4	1	2			
3.3 LEED Owner's Project Requirements (OPR) Development											
a. OPR Follow-up Meetings				4	7			2	2		
b. OPR Summary Draft				1	1			1	2		
3.4 Program Refinement											
Tour similar facilities in the region with stakeholders (Two half day tours)	FFA			10	12			8	8		
b. Community Engagement – Values and Programming	FFA/BW/MR			0	0	0		0	0		
c. Focus Group Meetings (Spatial, MEP, & FF&E requirements)	FFA/PAE			4	16	16		12	32		
d. Quality Assurance Review				2	4			8		2	
e. Draft Summary				1	4	12		20	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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Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$180		
Hours	10	15	69	148	98	0	96	154	0	4	
Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$0	\$180	
Fee	\$2,400	\$3,150	\$11,040	\$20,720	\$13,720	\$0	\$12,000	\$13,860	\$0	\$720	\$ 77,610.00
	1.67	2.50	11.50	24.67	16.33	0.00	16.00	25.67	0.00	0.67	6
Task 4 Schematic Design (RFP Tasks 5 & 6)										12 wks + 2 wks owner review	
4.0	<u>Meetings</u>										
a.	Owner-Architect meetings (bi-weekly)		4	8	28	14		6	6		
b.	A/E coordination meetings (weekly, 1-hour)		Core design team regularly,			8	12	24	12	3	3
c.	Preliminary LEED scorecard meeting			1	1	2	1		2	2	
d.	Sustainable Procurement kick-off meeting and documentation		BW		1	1			2	2	
4.1	<u>Develop Three (3) Concept Options</u>										
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				4	4			3	2	
e.	Quality Assurance, revisions, and issue package		1	2	2	6	6	6	2		1
4.2	<u>Design Charrette One: Three design schemes and select preferred</u>										
a.	Electronic presentation and presentation boards		FFA, BW/MR prep		2	4	8	8	16	4	8
b.	Charette (4 hrs)		4	4	5	6	4	6	4	4	
4.3	<u>Develop Preferred Concept</u>		1	8	8	16	16	32	40	20	
4.4	<u>Discuss strategy for continued pool operation during construction</u> (fee only for exploring options, full design NIC)			4	8	8					
4.5	<u>Design Charrette Two: Preferred option (4 hours)</u>										
a.	Electronic presentation and presentation boards		FFA		2	4	8	8	12	4	8
b.	Charette (4 hrs)		4	4	5	6	4	6	4	4	
4.6	<u>Furniture Design - Develop Layouts and Furniture Vision</u>										
a.	Client Meeting - Review furniture layout options / select preferred option			1	1				8	16	
b.	Furniture Visioning Meeting with client and track comments								4	8	
4.7	<u>Performance Tracking Reports</u> for Certification/Green Design Requirements										
a.	LEED & Green Building Policy Checklists		BW		4	8	8		2	2	
b.	Energy Model for system selection (Utilizing Schematic 3D Model)		PAE			8					
4.8	<u>Define scope of work for PP&R to select Commissioning Agent</u>				2		8				
4.9	<u>Pre-Application with City of Portland</u>										
a.	Pre-Application package		AP led process		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 - Assume alternates are included</u>										
a.	Drawings			36	54	180	324	324	20	80	
b.	Outline Specification & Narratives				16	16	4	4	24	16	

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	Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$180		
Include preliminary LEED Scorecard and high performances measures												
c. Cost Estimate					2	12			2			
d. Design and Construction Schedule					8	12			3	2		
e. Preliminary FF&E list and costs					4							
f. Assemble package					1				8	16		
g. Quality Assurance review and checklists			1		4	8			8		8	
h. Revisions and Issue Report					8	8	8					
4.11 Present SD package to Owner's staff			1	1	1	1			8	16		
4.12 Plan Review Meeting with Owner's staff												
a. Track comments and provide A/E response					2	2	2		2	4		
4.13 Community Presentation (Public Involvement Plan Presentation #1)												
a. Prepare renderings and presentation materials					1	4	4		2	4		
b. Community input summary report												
	Hours	17	108	218	437	495	516	190	267	0	9	
	Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$0	\$180	
	Fee	\$4,080	\$22,680	\$34,880	\$61,180	\$69,300	\$56,760	\$23,750	\$24,030	\$0	\$1,620	\$ 298,280.00
		1.21	7.71	15.57	31.21	35.36	36.86	13.57	19.07	0.00	0.64	14
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)					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 hour)												
c. A/E Revit model updates due bi-weekly (prior to coordination meeting)					8	16	32	16	16	6	6	
							2	8				
5.1 MEP System Selection (RFP Task 7)												
a. MEP Systems Focus Group Meeting with PP&R					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					
g. Owner review and comment, A/E response						2	4	4				
5.2 Systems, Equipment, and Materials Review Meetings (RFP Task 8.10)												
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		

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Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$180		
e. Interior Finishes Presentation and Owner Review Meeting			4	2			24	16			
f. Track, respond, and incorporate owner comments for each meeting				5	5	10	2	4			
5.3 <u>50% Design Development Progress Package - Not priced - coordination only</u> All team											
a. Drawings			42	56	140	210	224	22	80		
b. Outline Specifications				8	8		4	8			
Attach system and material packages				PAE		2					
Include draft envelope testing and commissioning requirements				MH/PAE/BW	2	2					
c. Outline of furniture specifications and proposed color boards			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		12		
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)				0	0	0	0	0	0		
5.6 <u>Land Use Review - Assumed Type III Review</u> (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	16	24	24		
2. Neighborhood meeting				FFA/AP/MR	2	2	2				
3. Attendance list and meeting notes				AP	1	4					
b. Land Use Package				AP							
1. 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 <u>Public Works Permit (PWP) Process</u>			Vega submitting		1	2					
a. Submit PWP Concept package											
b. AHJ Package Review meeting					1	1					
5.8 <u>100% Design Development Package (35% Construction Documents)</u>											
a. Drawings (RFP Task 8.11)					35	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		8		16
e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)					All team	4	2	8			
5.9 <u>Performance Tracking Report Update</u> (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	0			
c. Life-Cycle Cost Analysis Update						2	2	2			

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Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$180		
5.10. Plan Review Meeting with Owner's staff			2	2	2	2					
a. Track comments and provide A/E response				1	4	4	2	4			
Hours	2	130	233	468	553	548	210	386	0	28	
Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$0	\$180	
Fee	\$480	\$27,300	\$37,280	\$65,520	\$77,420	\$60,280	\$26,250	\$34,740	\$0	\$5,040	\$ 334,310.00
	0.13	8.13	14.56	29.25	34.56	34.25	13.13	24.13	0.00	1.75	16
Task 6 Construction Documents (RFP Task 9)										18 weeks	
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) A/E Revit model updates due bi-weekly (prior to coordination meeting)			10	10	18	18	9	5	5		
6.1 Public Works Permit (PWP) Process				1	2						
a. Submit PWP Design package				1	1						
b. AHJ Package Review meeting				1	1						
6.2 75% CD Progress Package (RFP Task 9.1)											
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											
e. Cost Estimate				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		24	
6.3 Plan Review Meeting with Owner Team (RFP Task 9.1.18.2)											
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 Security, A/V, and Technology Systems Package and Owner Review			0	0	0	0		0	0		
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			4	2				8	12		
f. Track, respond, and incorporate owner comments for each meeting				5	5	10		2	4		

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Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$180		
6.5	<u>95% CD Progress Package (RFP Task 9.2)</u>										
a.			36	48	168	192	216	28	80		
b.				6	6			6	4		
c.					1						
d.		1	1	6	6		8		20		
e.			1	2	2						
6.7	Plan Review Meeting with Owner Team (9.2.7.2) FFA/PAE										
a.			2	2	2	2					
				1	4	4		2	4		
6.8	<u>Public Works Permit (PWP) Process</u>										
a.				1	2						
b.				1	1						
6.9	<u>100% Construction Documents/ Permit Submittal to PP&R PM</u> All Team										
a.		4	4	12	16	12	24	8	20		4
b.		2		8	2			6	4		4
c.					1						
d.					4			1	2		
e.				8	4						
6.10.	Owner review and approval										
			1	1	1						
Hours	9	131	261	619	658	697	231	398	0	52	
Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$0	\$180	
Fee	\$2,160	\$27,510	\$41,760	\$86,660	\$92,120	\$76,670	\$28,875	\$35,820	\$0	\$9,360	\$ 400,935.00
	0.45	6.55	13.05	30.95	32.90	34.85	11.55	19.90	0.00	2.60	20
Task 7	Permitting and Bidding (RFP Task 10)										
7.0.	Owner-Architect Update Meetings (monthly)										
			1	4	4						
7.1	<u>Permitting</u>										
a.				4	4	16	2				
b.			8	32	256	64					
7.2	<u>Bidding</u>										
a.											
b.											
c.			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	0		
7.4	Public Works Permit (PWP) Process										
a.											
7.5	LEED Design Phase Review/Complete LEED Documentation										
				2	4						
Hours	0	13	62	328	120	2	0	0	0	0	
Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$0	\$180	
Fee	\$0	\$2,730	\$9,920	\$45,920	\$16,800	\$220	\$0	\$0	\$0	\$0	\$ 75,590.00

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

FFA Architecture + Interiors
 Architecture

Role	Principal	Project Designer/ Partner	Project Manager	Project Architect/ Arch. Staff IV	Architectural Staff IV	Architectural Staff II	Interior Designer III	Interior Designer I	Quality Assurance/ Sr. PM	Duration	Subtotals
Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$180		
Task 8 Construction Administration (RFP Task 11)										~12-18 mo.	
8.0. Meetings											
a. Pre-Construction Meetings											
1. Contractor Kick-off Pre-construction Meeting			2	4	2						
2. LEED Pre-construction Meeting				2	4						
3. Specialty and System Pre-construction Meetings				10	10						
b. Owner-Architect-Contractor Meetings: Weekly				156	156						
Site Visits and Observation Reports - four times per month min. 2x per											
month min. (by A/E team - not each consultant)			18	39	234						
d. Client/Vendor Furniture coordination meetings (five meetings)			5				40	80			
e. LEED update meetings (every 4-6 weeks 9 meetings)				12	30						
8.1 Construction Administration Services (RFP Tasks 11.4-11.7)											
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				16	16						
Owner's Consultant Coordination: Commissioning/Vendors (RFP											
e. 11.10.)				12	20						
Envelope testing											
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)			1				10	10			
8.4 Testing and Balancing (Commissioning agent coordination in Task 9)				4							
a. Attend Equipment or System Start up/Testing				2	10						
b. Testing and balancing observations and Test Data Reviews				1	4						
8.5 Substantial Completion Process											
a. Review General Contractor issued substantial completion punch list				1	1						
b. A/E Punch List Observations and Reports		1	1	12	24		8	12			
c. Back punch walk of contractor completed punch list		1	1	4	12						
d. Issue Certificate of Substantial Completion		1		1	2						
8.6 Certificate of Occupancy				1							
Hours	3	100	514	1833	0	0	116	200	0	0	
Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$0	\$180	
Fee	\$720	\$21,000	\$82,240	\$256,620	\$0	\$0	\$14,500	\$18,000	\$0	\$0	\$ 393,080.00

Task 9 Commissioning and LEED Submission (RFP Task 13)

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

FFA Architecture + Interiors
 Architecture

	Principal	Project Designer/ Partner	Project Manager	Project Architect/ Arch. Staff IV	Architectural Staff IV	Architectural Staff II	Interior Designer III	Interior Designer I	Quality Assurance/ Sr. PM	Duration	Subtotals
Role	Principal	Project Designer/ Partner	Project Manager	Project Architect/ Arch. Staff IV	Architectural Staff IV	Architectural Staff II	Interior Designer III	Interior Designer I	Quality Assurance/ Sr. PM	Duration	Subtotals
Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$180		
9.0. A/E coordination of owner provided Commissioning and Testing											
a. Attend commissioning meetings (minimum of five meetings)				5	10						
b. A/E coordination with owner provided Commissioning Agent				2	10						
c. Testing and balancing observations and Test Data Reviews see 8.4 b.				0	0						
9.1 LEED Submission											
a. LEED Construction-Phase and Final Certification Review				1	8			4			
b. LEED Submission											
Hours	0	0	8	28	0	0	4	0	0	0	
Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$0	\$180	
Fee	\$0	\$0	\$1,280	\$3,920	\$0	\$0	\$500	\$0	\$0	\$0	\$ 5,700.00

Task 10 Project Closeout (RFP Task 11 & 14)

	Praxis	PAE/FFA/MH	PAE/FFA/MH	ALL TEAM	ALL TEAM	FFA	FFA	Hours	Rate	Fee	Duration	Subtotals
10.1 <u>Asset Management Plan</u> - Review contractor and Praxis deliverables	4										1 mo	
a. Review Plan and evaluate maintenance and life-cycle information	8	8										
b. Review Facility Information Model (FIM)	4	8										
10.2 <u>Final Completion Observations</u> (RFP 14.6)												
a. Two (2) comprehensive punch list closeout observations and updates		1	8	16								
10.3 Furnishing Final Completion Observation and Closeout			1				8	12				
10.4 <u>Project Closeout Documents</u> (RFP 14.7)												
a. Record Documents from contractor as-built mark-ups (RFP 14.1)			8									
Update Revit Models				32								
Reproducible Record Drawings (PDF)				8								
b. Operations & Maintenance Manual and closeout document reviews			2	16								
c. Close out coordination			16	16								
10.5 Issue Final Payment after owner final acceptance			2	4								
Hours	1	0	53	108	0	0	8	12	0	0		
Rate	\$240	\$210	\$160	\$140	\$140	\$110	\$125	\$90	\$0	\$180		
Fee	\$240	\$0	\$8,480	\$15,120	\$0	\$0	\$1,000	\$1,080	\$0	\$0		\$ 25,920.00

TOTAL FEES \$ 1,680,425.00

EX Expenses

Total Expenses \$ 34,000.00 \$ 33,608.50

Contract Total \$ 1,714,425.00

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

R2: 02.15.2021

M.Thrailkill.Architect LLC
 Arch'I Specifications and Project Manual

	Principal	Senior Specifier	Junior Specifier	Architect Intern	Office Admin	Role	Role	Role	Role	Role	Duration	Subtotals
Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$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
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	0	0	0	0	0	
Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	\$0	\$0	\$0	\$0	
Fee	\$0	\$0	\$0	\$0	\$0	\$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											
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											
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											
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	0	0	0	0	0	0	0	0	0	0	0	
Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	\$0	\$0	\$0	\$0	
Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ -
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 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 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
- i. Quality Assurance Review
- j. Draft Outline
- 3.2 Building Performance Strategies PAE/All team
 - 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
- 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
- 3.5 Review with Owner and Track comments FFA
 - Incorporate Owner Comments & Issue Final Reports All team

Hours	0	0	0	0	0	0	0	0	0	0	0
Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	\$0	\$0	\$0	\$0
Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$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) Core design team regularly, other consultants as needed
 - c. Preliminary LEED scorecard meeting
 - d. Sustainable Procurement kick-off meeting and documentator 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
 - d. Cost estimates
 - 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
- 4.4 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 option
 - b. Furniture Visioning Meeting with client and track comments
- 4.7 Performance Tracking Reports for Certification/Green Design Requirements
 - a. LEED & Green Building Policy Checklists BW
 - b. Energy Model for system selection (Utilizing Schematic 3D Model) BW
- 4.8 Define scope of work for PP&R to select Commissioning Agent PAE
- 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. 100% Schematic Design Package- Assume alternates are included
 - a. Drawings
 - b. Outline Specification & Narratives

4	12	8	10	4
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5.8	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	RLB/team review	4	14	17	21	4						
	d. Quality Assurance review and checklists e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)	All team											
5.9	<u>Performance Tracking Report Update</u> (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 a. Track comments and provide A/E response	FFA/PAE											
		Hours	8	26	33	41	8	0	0	0	0	0	
		Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	\$0	\$0	\$0	
		Fee	\$1,800	\$4,420	\$4,620	\$4,100	\$680	\$0	\$0	\$0	\$0	\$0	\$ 15,620.00

Task 6 Construction Documents (RFP Task 9) 18 weeks

6.0.	<u>Meetings</u> 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	<u>Public Works Permit (PWP) Process</u> a. Submit PWP Design package b. AHJ Package Review meeting												
6.2	<u>75% CD Progress Package</u> (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 i. Quality Assurance - copy of redline set	RLB/team review	4	12	16	20	4						
6.3	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 c. Security, A/V, and Technology Systems Package and Owner Review Meeting d. Meeting e. Lighting and Energy Management Package and Owner Review Meeting f. Interior Finishes Presentation and Owner Review Meeting g. 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)		4	12	16	20	4						
6.7	Plan Review Meeting with Owner Team (9.2.7.2) a. Track, respond, and incorporate owner comments	FFA/PAE											
6.8	<u>Public Works Permit (PWP) Process</u> 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 c. Stamped Final Design Calculations	All Team	4	13	16	27	4						

d. Updated Cost Estimate	RLB/team review											
e. Permit Application Forms and support documentation												
6.10. Owner review and approval	Hours	12	37	48	67	12	0	0	0	0	0	
	Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	\$0	\$0	\$0	
	Fee	\$2,700	\$6,290	\$6,720	\$6,700	\$1,020	\$0	\$0	\$0	\$0	\$0	\$ 23,430.00

Task 7 Permitting and Bidding (RFP Task 10)

7.0. Owner-Architect Update Meetings (monthly)												
7.1 <u>Permitting</u>												
a. Submit for Permit												
b. Permit check sheet responses and tracking												
7.2 <u>Bidding</u>												
a. Prepare Bid Set Documents												
b. Pre-Bid Conference												
c. Bid Phase A/E Services		2	4	10	6	2						
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	2	4	10	6	2	0	0	0	0	0	
	Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	\$0	\$0	\$0	
	Fee	\$450	\$680	\$1,400	\$600	\$170	\$0	\$0	\$0	\$0	\$0	\$ 3,300.00

Task 8 Construction Administration (RFP Task 11) ~12-18 mo.

8.0. <u>Meetings</u>												
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 <u>Construction Administration Services</u> (RFP Tasks 11.4-11.7)												
a. Submittals		2	8	2	2	2						
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.)												
<u>Envelope testing</u>	MH/FFA											
a. Mock up Reviews												
b. Window Testing												
8.3 Furnishing Installation Punch List Observations	FFA											
(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	
	Rate	\$225	\$170	\$140	\$100	\$85	\$0	\$0	\$0	\$0	\$0	
	Fee	\$450	\$1,360	\$280	\$200	\$170	\$0	\$0	\$0	\$0	\$0	\$ 2,460.00

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.											

- 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	0	0	0	0	0	0	0	0	0	0	0		
Rate	\$210	\$165	\$150	\$125	\$90	\$100	\$100	\$100	\$100	\$100	\$100		
Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ -

Task 10 Project Closeout (RFP Task 11 & 14) 1 mo.

10.1	<u>Asset Management Plan</u> - 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	<u>Final Completion Observations</u> (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	<u>Project Closeout Documents</u> (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	ALL TEAM		2									
	c. Close out coordination	FFA											
10.5	Issue Final Payment after owner final acceptance	FFA											
		Hours	8	22	0	24	0	0	0	0	0		
		Rate	\$210	\$165	\$150	\$125	\$90	\$100	\$100	\$100	\$100		
		Fee	\$1,680	\$3,630	\$0	\$3,000	\$0	\$0	\$0	\$0	\$0	#####	\$ 8,310.00

TOTAL 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

PAE														
MEP + Sustainability														
Role	PM	EOR	M Lead	P Lead	FP Lead	E Lead	BA/M Lead	Designer	BIM Tech	Project Coordinator	Duration	Subtotals		
Rate	\$255	\$255	\$215	\$185	\$185	\$185	\$185	\$145	\$120	\$115				
Task 1 Project Initiation														
1.1	Detailed Work Plan, Design Program, & Fee (In progress)													
	FFA													
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													
1.3	A/E Team Kick-off Meeting (1-hour meeting)													
	All Team											1		
				1										
	Hours	9	0	1	0	0	0	0	0	0	0			
	Rate	\$255	\$255	\$215	\$185	\$185	\$185	\$185	\$145	\$120	\$115			
	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			
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	2	2	0	2							
2.4.	A/E Team Coordination Meetings (Three, One, 1-hour each)													
		1	0	1	1	0	1							
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													
d.	Hazardous Materials Assessment- Confirm scope, see existing PPR reports													
e.	Building Assessment Report											2		
2.6.	Site Survey (RFP Task 4)													
	KPF													
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													
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			
	Hours	5	6	7	7	4	7	0	0	0	4			
	Rate	\$255	\$255	\$215	\$185	\$185	\$185	\$185	\$145	\$120	\$115			
	Fee	\$1,275	\$1,530	\$1,505	\$1,295	\$740	\$1,295	\$0	\$0	\$0	\$460	\$ 8,100.00		
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)													
	FFA/PAE/BW											6		
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											2		
3.1	Building Performance Workshop Summary (includes resilience and sustainability SEE NPB Design Guide													
			0	1	1	0	1				2			

b. A/E coordination with owner provided Commissioning Agent	1		4	4		4		12					
c. Testing and balancing observations and Test Data Reviews see 8.4 b.	0		0	0									
9.1 LEED Submission													
a. LEED Construction-Phase and Final Certification Review													
b. LEED Submission													
	Hours	1	0	4	4	0	4	0	12	0	0		
	Rate	\$255	\$255	\$215	\$185	\$185	\$185	\$185	\$145	\$120	\$115		
	Fee	\$255	\$0	\$860	\$740	\$0	\$740	\$0	\$1,740	\$0	\$0	\$	4,335.00

Task 10 Project Closeout (RFP Task 11 & 14)													1 mo.
10.1 <u>Asset Management Plan</u> - 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 <u>Final Completion Observations</u> (RFP 14.6)	ALL TEAM												
a. Two (2) comprehensive punch list closeout observations and updates		1		1	1	1	1		8				2
10.3 Furnishing Final Completion Observation and Closeout		1											
10.4 <u>Project Closeout Documents</u> (RFP 14.7)													
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	ALL TEAM		1	0	0	0	1		6				1
c. Close out coordination	FFA												
10.5 Issue Final Payment after owner final acceptance	FFA												
	Hours	2	1	5	5	5	6	0	38	16	5		
	Rate	\$255	\$255	\$215	\$185	\$185	\$185	\$185	\$145	\$120	\$115		
	Fee	\$510	\$255	\$1,075	\$925	\$925	\$1,110	\$0	\$5,510	\$1,920	\$575	\$	12,805.00

TOTAL 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

12.12.2020 DRAFT

PAE Technology													Duration	Subtotals
Role	PM	EOR	Lead	Designer	BIM Tech	Project Coordinator	Role	Role	Role	Role	Duration	Subtotals		
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		
1.2	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	\$115	\$0	\$0	\$0	\$0			
	Fee	\$0	\$0	\$185	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ 185.00		
Task 2 Pre-Design Assessment (RFP Tasks 2 & 4)													4-6 wks	
2.1.	Review PP&R provided facility information												2	
2.2.	Develop/Distribute base plans and templates													
2.3.	Conduct Assessment Site Visits (1 visit + 1 follow-up)												2	
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 design team + PBS		
	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	
2.6.	Site Survey (RFP Task 4)											KPFF	1	
	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													
2.8	Quality Assurance Review													
2.9	Revisions and Issue Electronic Draft Reports												1	
2.10	Review with Owner and Track comments											FFA		
2.11	Incorporate Owner Comments & Issue Final Reports												1	
	Hours	0	0	13	0	0	2	0	0	0	0			
	Rate	\$255	\$215	\$185	\$145	\$120	\$115	\$0	\$0	\$0	\$0			
	Fee	\$0	\$0	\$2,405	\$0	\$0	\$230	\$0	\$0	\$0	\$0	\$ 2,635.00		
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 meetings)											FFA/PAE/BW		
	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	4	
3.1	Building Performance Workshop Summary (includes resilience and sustainability)											SEE NPB Design Guide		
	a. Whole Building Energy Performance											PAE, FFA, BW		

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

Hours	0	0	0	0	0	0	0	0	0	0	0
Rate	\$255	\$215	\$185	\$145	\$120	\$115	\$0	\$0	\$0	\$0	\$0
Fee	\$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
 - a. Review Plan and evaluate maintenance and life-cycle informatior
 - b. Review Facility Information Model (FIM)
- 10.2 Final Completion Observations (RFP 14.6)
 - 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
 - Reproducible Record Drawings (PDF)
 - b. Operations & Maintenance Manual and closeout document reviews
 - c. Close out coordination
- 10.5 Issue Final Payment after owner final acceptance

Praxis
PAE/FFA/MH
PAE/FFA/MH
ALL TEAM

ALL TEAM
FFA
FFA

1	2			
1	2			
		1	4	
				4
		1	2	

Hours	0	0	4	10	4	0	0	0	0	0
Rate	\$255	\$215	\$185	\$145	\$120	\$115	\$0	\$0	\$0	\$0
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

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

Hours	0	8	0	0	0	0	0	0	0	0	0	
Rate	\$190	\$150	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	
Fee	\$0	\$1,200	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ 1,200.00

Task 10 Project Closeout (RFP Task 11 & 14)

												1 mo.	
10.1	<u>Asset Management Plan</u> - Review contractor and Praxis deliverables	Praxis											
	a. Review Plan and evaluate maintenance and life-cycle informatior	PAE/FFA/MH		2									
	b. Review Facility Information Model (FIM)	PAE/FFA/MH		4									
10.2	<u>Final Completion Observations</u> (RFP 14.6)	ALL TEAM											
	a. Two (2) comprehensive punch list closeout observations and updates			3									
10.3	Furnishing Final Completion Observation and Closeout												
10.4	<u>Project Closeout Documents</u> (RFP 14.7)												
	a. Record Documents from contractor as-built mark-ups (RFP 14.1)	ALL TEAM											
	Update Revit Models			24									
	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	0	33	0	0	0	0	0	0		
			Rate	\$190	\$150	\$100	\$100	\$100	\$100	\$100	\$100		
			Fee	\$0	\$4,950	\$0	\$0	\$0	\$0	\$0	\$0	\$ 4,950.00	

TOTAL FEES \$ 107,600.00

EX Expenses

Total Expenses												\$ 500.00
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\$ 108,100.00

5.7	<u>Public Works Permit (PWP) Process</u>	Vega submitting											
	a. Submit PWP Concept package		1	12	40	24							
	b. AHJ Package Review meeting			1.5	1.5								
5.8	<u>100% Design Development Package</u> (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	<u>Performance Tracking Report Update</u> (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	\$14,365	\$13,703	\$8,640	\$0	\$0	\$0	\$0	\$0	\$0	\$ 37,582.50

Task 6 Construction Documents (RFP Task 9) 18 weeks

6.0.	<u>Meetings</u>												
	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 regularly, (9	9								
	A/E Revit model updates due bi-weekly (prior to coordination meeting)												
6.1	<u>Public Works Permit (PWP) Process</u>												
	a. Submit PWP Design package		1	16	48	24							
	b. AHJ Package Review meeting			1.5	1.5								
6.2	<u>75% CD Progress Package</u> (RFP Task 9.1)												
	a. Drawings		1	12	32	24							
	b. Specifications			8									
	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									
	f. Design & Construction Schedule												
	g. 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	<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												
	c. Security, A/V, and Technology Systems Package and Owner 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												
6.5	<u>95% CD Progress Package</u> (RFP Task 9.2)												
	a. Drawings		1	16	32	20							
	b. Specifications (incorporating LEED lists and list of O&M requirements)			4									
	c. Full Design Calculations			12	12								
	d. Quality Assurance review			4									
	e. List identifying anticipated long lead items (9.2.5)			1									
6.7	Plan Review Meeting with Owner Team (9.2.7.2)	FFA/PAE			2								
	a. Track, respond, and incorporate owner comments				2	4							
6.8	<u>Public Works Permit (PWP) Process</u>												
	a. Submit PWP Final package				8	24							
	b. AHJ Package Review meeting												
6.9	<u>100% Construction Documents</u> Permit Submittal to PP&R PM	All Team											
	a. Stamped Drawings			8	16								

- 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	0	0	0	0	0	0	0	0	0	0	0		
Rate	\$175	\$170	\$105	\$90	\$100	\$100	\$100	\$100	\$100	\$100	\$100		
Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	-

Task 10 Project Closeout (RFP Task 11 & 14) 1 mo.

10.1	<u>Asset Management Plan</u> - 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	<u>Final Completion Observations</u> (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	<u>Project Closeout Documents</u> (RFP 14.7)												
	a. Record Documents from contractor as-built mark-ups (RFP 14.1)	ALL TEAM		4	8	32							
	Update Revit Models												
	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		
		Rate	\$175	\$170	\$105	\$90	\$100	\$100	\$100	\$100	\$100		
		Fee	\$0	\$2,720	\$840	\$2,880	\$0	\$0	\$0	\$0	\$0	\$	6,440.00

TOTAL FEES \$ 136,425.00

EX Expenses													
Total Expenses												\$	200.00

Contract Total \$ 136,625.00

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

Mayer/Reed, Inc.
 Landscape Architecture

	Role	Principal Rate	Project Manager/LA \$130	Landscape Designer \$80	Duration	Subtotals
Task 1 Project Initiation						2021
1.1	Detailed Work Plan, Design Program, & Fee (In progress)	FFA				
	a. Scope of Work	All Team	2	2		
	b. Schedule	FFA				
	c. Detailed Workplan with Fee	All Team	2	2		
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		
	Hours		5	5	0	
	Rate	\$225	\$130	\$80		
	Fee	\$1,125	\$650	\$0		\$ 1,775.00
Task 2 Pre-Design Assessment (RFP Tasks 2 & 4)						4-6 wks; 2021
2.1.	Review PP&R provided facility information					
2.2.	Develop/Distribute base plans and templates			1	1	
2.3.	Conduct Assessment Site Visits (1 visit +1 follow-up)		1	1	1	
2.4.	A/E Team Coordination Meetings (Three,One, 1-hour each)			1		
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					
	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					
	b. Site survey (Full park site property lines and trees)			1		
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		0.5	4	8	
2.8	Quality Assurance Review		0.5			
2.9	Revisions and Issue Electronic Draft Reports			2	2	

2.10. Review with Owner and Track comments	FFA					
2.11 Incorporate Owner Comments & Issue Final Reports			2	2		
	Hours	2	18.5	14		
	Rate	\$225	\$130	\$80		
	Fee	\$450	\$2,405	\$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)	FFA/PAE/BW		6			
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		4			
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		4			
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					
i. Quality Assurance Review		0.5	2			
j. Draft Outline			1			
3.2 Building Performance Strategies	PAE/All team					
a. Meeting with PP&R Operations - systems discussion			2			
b. Facilities Management focus group - FIM requirements	FFA/PAE/Praxis					
c. High-Performance Building Plan Strategy options						
d. Quality Assurance Review			2			
e. Draft Strategies			1			
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		0			
c. Focus Group Meetings (Spatial, MEP, & FF&E requirements)	FFA/PAE					
d. Quality Assurance Review		0.5	2			
e. Draft Summary			2			
3.5 Review with Owner and Track comments	FFA					
Incorporate Owner Comments & Issue Final Reports	All team		2			
	Hours	1	29	0		
	Rate	\$225	\$130	\$80		
	Fee	\$225	\$3,770	\$0	\$	3,995.00

Task 4 Schematic Design (RFP Tasks 5 & 6) 12 wks + 2 wks owner review; 2021

4.0 Meetings						
a. Owner-Architect meetings (bi-weekly)			7			
b. A/E coordination meetings (weekly, 1-hour)	Core design team regularly, c		14			
c. Preliminary LEED scorecard meeting			2			

4.1	d. Sustainable Procurement kick-off meeting and documentation	BW			
	Develop Three (3) Concept Options				
	a. Site and Building plans		2	16	30
	b. Shoebox Energy Model for massing concepts COVE tool	FFA/PAE			
	c. Narratives and LEED strategies	ALL		2	
	d. Cost estimates			2	
	e. Quality Assurance, revisions, and issue package		1	2	8
4.2	<u>Design Charrette One</u> : Three design schemes and select preferred	FFA, BW/MR prep			
	a. Electronic presentation and presentation boards		1	8	12
	b. Charette (4 hrs)			4	
4.3	Develop Preferred Concept		1	12	24
4.4	Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC)				
4.5	<u>Design Charrette Two</u> : Preferred option (4 hours)	FFA			
	a. Electronic presentation and presentation boards				
	b. Charette (4 hrs)				
4.6	<u>Furniture Design</u> - 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	<u>Performance Tracking Reports</u> for Certification/Green Design Requirements	BW			
	a. LEED & Green Building Policy Checklists	BW		2	
	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	<u>Pre-Application</u> with City of Portland	AP led process			
	a. Pre-Application package	AP/FFA/Vega/MR		2	
	b. Pre-application Conference	FFA/Vega/AP		2	
	c. Pre-application notes response	ALL TEAM		2	
4.10.	<u>100% Schematic Design Package</u> - Assume alternates are included				
	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				
	e. Preliminary FF&E list and costs				
	f. Assemble package				
	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			
	a. Track comments and provide A/E response	ALL		2	
4.13	Community Presentation (Public Involvement Plan Presentation #1)				
	a. Prepare renderings and presentation materials	FFA/MR	1	8	16
	b. Community input summary report	FFA		1	
		Hours	8	114	134
		Rate	\$225	\$130	\$80
		Fee	\$1,800	\$14,820	\$10,720
					\$ 27,340.00

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)			4	

	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 team regularly, c		9	
5.1	<u>MEP System Selection</u> (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	<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	<u>50% Design Development Progress Package - Not priced - coordination only</u>	All team			
	a. Drawings		1	24	60
	b. Outline Specifications Attach system and material packages Include draft envelope testing and commissioning requirements	PAE MH/PAE/BW		4	
	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	
	f. Assemble package			4	8
	g. Quality Assurance Review		1	4	4
5.4	Progress review meeting with the Owner's Project Manager Owner review and comments. A/E track and provide response	FFA		2	
				4	
5.5	<u>Value Engineering, as required (RFP Task 8.8)</u>		0	0	0
5.6	<u>Land Use Review - Assumed Type III Review</u> (RFP Task 6)	6-12 months			
	a. Neighborhood meeting (Public Involvement Plan Presentation #2)				
	1. Notification and presentation materials for Neighborhood meeting	FFA		2	12
	2. Neighborhood meeting	FFA/AP/MR		2	
	3. Attendance list and meeting notes	AP			
	b. Land Use Package	AP			
	1. Development, Draft Report, internal review (Including support drawings, tree plan, reports, and materials board)	All team		8	16
	2. Final Package & Submittal			4	8
	c. Public Hearing			0	
5.7	<u>Public Works Permit (PWP) Process</u>	Vega submitting			
	a. Submit PWP Concept package				
	b. AHJ Package Review meeting				
5.8	<u>100% Design Development Package</u> (35% Construction Documents)				
	a. Drawings (RFP Task 8.11)		1	24	60
	b. Specifications			4	
	c. Cost Estimate	RLB/team review		2	

d. Quality Assurance review and checklists		1	2			
e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)	All team		0			
5.9 <u>Performance Tracking Report Update</u> (RFP Task 8.12)						
a. LEED & Green Building Policy Checklists			2			
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	4	109	168		
	Rate	\$225	\$130	\$80		
	Fee	\$900	\$14,170	\$13,440	\$	28,510.00

Task 6 Construction Documents (RFP Task 9) 18 weeks; 2022

6.0. <u>Meetings</u>						
a. Owner-Architect Meeting			4			
b. Client/Vendor Furniture coordination meetings (five meetings)						
c. A/E team coordination meeting (bi-weekly - 1 hour)	Core design team regularly, c		6			
A/E Revit model updates due bi-weekly (prior to coordination meeting)						
6.1 <u>Public Works Permit (PWP) Process</u>						
a. Submit PWP Design package						
b. AHJ Package Review meeting						
6.2 <u>75% CD Progress Package</u> (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						
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		4			
a. Track, respond, and incorporate owner comments			4			
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						
c. Security, A/V, and Technology Systems Package and Owner 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						
6.5 <u>95% CD Progress Package</u> (RFP Task 9.2)						
a. Drawings			24	80		
b. Specifications (incorporating LEED lists and list of O&M requirements)			4			
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)	FFA/PAE		0			
	a. Track, respond, and incorporate owner comments			2	8		
6.8	<u>Public Works Permit (PWP) Process</u>						
	a. Submit PWP Final package						
	b. AHJ Package Review meeting						
6.9	<u>100% Construction Documents/ Permit Submittal to PP&R PM</u>	All Team					
	a. Stamped Drawings		2	8	12		
	b. Stamped Specifications			2			
	c. Stamped Final Design Calculations						
	d. Updated Cost Estimate	RLB/team review		2			
	e. Permit Application Forms and support documentation						
6.10.	Owner review and approval						
		Hours	6	123	306		
		Rate	\$225	\$130	\$80		
		Fee	\$1,350	\$15,990	\$24,480	\$	41,820.00

Task 7 Permitting and Bidding (RFP Task 10) 2023

7.0.	Owner-Architect Update Meetings (monthly)						
7.1	<u>Permitting</u>						
	a. Submit for Permit			4	8		
	b. Permit check sheet responses and tracking						
7.2	<u>Bidding</u>						
	a. Prepare Bid Set Documents			8	12		
	b. Pre-Bid Conference			2			
	c. Bid Phase A/E Services			12			
7.3	Value Engineering and reissuance (if all bids exceed cost estimate by 20%.			0	0		
7.4	Public Works Permit (PWP) Process						
	a. Submit Final Vellum package						
7.5	LEED Design Phase Review/Complete LEED Documentation			2	4		
		Hours	0	28	24		
		Rate	\$225	\$130	\$80		
		Fee	\$0	\$3,640	\$1,920	\$	5,560.00

Task 8 Construction Administration (RFP Task 11) ~12-18 mo.; 2024

8.0.	<u>Meetings</u>						
	a. Pre-Construction Meetings						
	1. Contractor Kick-off Pre-construction Meeting			2			
	2. LEED Pre-construction Meeting						
	3. Specialty and System Pre-construction Meetings						
	b. Owner-Architect-Contractor Meetings: Weekly			24			
	Site Visits and Observation Reports - four times per month min. 2x per						
	c. month min. (by A/E team - not each consultant)			48			
	d. Client/Vendor Furniture coordination meetings (five meetings)						
	e. LEED update meetings (every 4-6 weeks 9 meetings)			9			
8.1	<u>Construction Administration Services (RFP Tasks 11.4-11.7)</u>						
	a. Submittals			16	12		
	b. RFIs/ASI's/PCOs			24	16		
	c. Certification of Payment Applications						
	d. Changes, CO/PCO/CCD for owner review			8			
	e. Owner's Consultant Coordination: Commissioning/Vendors (RFP 11.10.)						

	<u>Envelope testing</u>	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						
	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					4	
	b. A/E Punch List Observations and Reports					8	
	c. Back punch walk of contractor completed punch list					4	
	d. Issue Certificate of Substantial Completion						
8.6	Certificate of Occupancy						
			Hours	0	147	28	
			Rate	\$225	\$130	\$80	
			Fee	\$0	\$19,110	\$2,240	\$ 21,350.00

Task 9 Commissioning and LEED Submission (RFP Task 13) 2025

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					8	
	b. LEED Submission						
			Hours	0	8	0	
			Rate	\$225	\$130	\$80	
			Fee	\$0	\$1,040	\$0	\$ 1,040.00

Task 10 Project Closeout (RFP Task 11 & 14) 1 mo.; 2025

10.1	<u>Asset Management Plan</u> - 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	<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	<u>Project Closeout Documents</u> (RFP 14.7)						
	a. Record Documents from contractor as-built mark-ups (RFP 14.1)	ALL TEAM				8	16
	Update Revit/Autocad Models					2	8
	Reproducible Record Drawings (PDF)					4	
	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	18	24	
			Rate	\$225	\$130	\$80	
			Fee	\$0	\$2,340	\$1,920	\$ 4,260.00

TOTAL FEES \$ 139,625.00

EX Expenses
Total Expenses

\$2,793

Contract Total

\$142,418

- a. Drawings
- b. Outline Specification & Narratives
Include preliminary LEED Scorecard and high performances measures
- c. Cost Estimate RLB/team review
- 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 FFA
- 4.12 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)
- a. Prepare renderings and presentation materials FFA/MR
- b. Community input summary report FFA

Hours	3	6	0	0	0	0	0	0	0	0	0	
Rate	\$130	\$190	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	
Fee	\$390	\$1,140	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ 1,530.00

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 design team regularly, 8
- 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
- c. ~~Energy Life-Cycle Cost Analysis/Life-cycle cost energy savings evaluation / MEP systems Energy Life-Cycle Cost Analysis /~~ Energy conservation opportunities
- d. Energy Model update based on selected systems, LEED input 1
- e. MEP Systems Selection Package Draft Report
- f. Owner review and comment, A/E response
- 5.2 Systems, Equipment, and Materials Review Meetings (RFP Task 8.10) 4
- a. Building Exterior Materials Presentation and Owner Review Meeting
- b. Plumbing Fixture Package (cutsheets) and Owner Review Meeting
- c. Security, A/V, and Technology Systems Package and Owner Coordination
- d. Review Meeting
- e. Lighting and Energy Management Package and Owner Review Meeting
- f. Interior Finishes Presentation and Owner Review Meeting
- 5.3 50% Design Development Progress Package - Not priced - coordination only All team
- a. Drawings 14 4
- b. Outline Specifications 12 2
- Attach system and material packages PAE
- Include draft envelope testing and commissioning requirements MH/PAE/BW 2
- 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)~~
- 5.6 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)
- 2. Final Package & Submittal

- b. Stamped Specifications
 - c. Stamped Final Design Calculations
 - d. Updated Cost Estimate
 - e. Permit Application Forms and support documentation
- 6.10. Owner review and approval

RLB/team review

Hours	50	24	0	0	0	0	0	0	0	0	0	
Rate	\$130	\$190	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	
Fee	\$6,500	\$4,560	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ 11,060.00

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
- 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	0	0	0	0	0	0	0	0	0	
Rate	\$130	\$190	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	
Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$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
 - 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 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/ASIs/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
- 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)
 - 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. 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

MH/FFA

FFA

All Team

Hours	193	56	0	0	0	0	0	0	0	0	0	
Rate	\$130	\$190	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	
Fee	\$25,090	\$10,640	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ 35,730.00

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)

6

- 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	0	6	0	0	0	0	0	0	0	0	0	
Rate	\$130	\$190	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	\$100	
Fee	\$0	\$1,140	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ 1,140.00

Task 10 Project Closeout (RFP Task 11 & 14) 1 mo.

10.1	<u>Asset Management Plan</u> - Review contractor and Praxis deliverables	Praxis										
	a. Review Plan and evaluate maintenance and life-cycle informatior	PAE/FFA/MH		3								
	b. Review Facility Information Model (FIM)	PAE/FFA/MH		3								
10.2	<u>Final Completion Observations</u> (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	<u>Project Closeout Documents</u> (RFP 14.7)											
	a. Record Documents from contractor as-built mark-ups (RFP 14.1)	ALL TEAM										
	Update Revit Models											
	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	
		Rate	\$130	\$190	\$100	\$100	\$100	\$100	\$100	\$100	\$100	
		Fee	\$4,160	\$3,420	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ 7,580.00

TOTAL 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
 FFA Architecture and Interiors Team
 Updated 4.9.2021

12.18.2020 DRAFT

Acoustic Design Studio
 Acoustics

	Role	Principal Engineer	Rate	Duration	Subtotals
			\$160		
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			
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		
			Rate \$160		
			Fee \$0		\$ -
Task 2 Pre-Design Assessment (RFP Tasks 2 & 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	1		
a.	Structural Investigations	ABHT			
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.	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	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 1		
			Rate \$160		
			Fee \$160		\$ 160.00
Task 3 Pre-Design Framework (RFP Task 3)					
				~6 wks	
3.0.	Meetings				
	Resilience/ Eco and High-Performance Goal setting workshops (Two 3-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 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
- i. Quality Assurance Review
- j. Draft Outline
- 3.2 Building Performance Strategies PAE/All team
 - 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
- 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
- 3.5 Review with Owner and Track comments FFA
 - Incorporate Owner Comments & Issue Final Reports All team

Hours 0
 Rate \$160
 Fee \$0

\$ -

Task 4 Schematic Design (RFP Tasks 5 & 6)

~3.5 mo

- 4.0 Meetings
 - a. Owner-Architect meetings (bi-weekly)
 - b. A/E coordination meetings (weekly, 1-hour) Core design team regularly, other consultants as needed
 - c. Preliminary LEED scorecard meeting
 - 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
 - d. Cost estimates
 - 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
- 4.4 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 option
 - b. Furniture Visioning Meeting with client and track comments
- 4.7 Performance Tracking Reports for Certification/Green Design Requirements
 - a. LEED & Green Building Policy Checklists BW
 - b. Energy Model for system selection (Utilizing Schematic 3D Model) BW
 - 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. 100% Schematic Design Package - Assume alternates are included 6.25
 - a. Drawings
 - b. Outline Specification & Narratives

	Include preliminary LEED Scorecard and high performances measures			
	c. Cost Estimate	RLB/team review		
	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	FFA		
4.12	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)	FFA/MR		
	a. Prepare renderings and presentation materials	FFA		
	b. Community input summary report			
		Hours	6.25	
		Rate	\$160	
		Fee	\$1,000	\$ 1,000.00

Task 5 Design Development (35% CDs) (RFP Tasks 6, 7, & 8) ~3.5 mo

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 A/E Revit model updates due bi-weekly (prior to coordination meeting)	Core design team regularly, other consultants as needed		
5.1	<u>MEP System Selection</u> (RFP Task 7)	PAE led process		
	a. MEP Systems Focus Group Meeting with PP&R			
	b. Develop Energy Conservation Measures table			
	c. Energy Life-Cycle Cost Analysis/ Life-cycle cost energy savings evaluation			
	d. MEP systems Energy Life-Cycle Cost Analysis /Energy conservation			
	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			
	c. Security, A/V, and Technology Systems Package and Owner Coordination			
	d. Review Meeting			
	e. Lighting and Energy Management Package and Owner Review Meeting			
	f. Interior Finishes Presentation and Owner Review Meeting			
	g. Track, respond, and incorporate owner comments for each meeting			
5.3	<u>50% Design Development Progress Package - Not priced - coordination only</u>	All team	15.625	
	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)			
5.6	<u>Land Use Review - Assumed Type III Review</u> (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)			
	2. Final Package & Submittal			
	c. Public Hearing			
5.7	<u>Public Works Permit (PWP) Process</u>	Vega submitting		
	a. Submit PWP Concept package			
	b. AHJ Package Review meeting			

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			
	d. Quality Assurance review and checklists				
	e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)	All team			
5.9	<u>Performance Tracking Report Update</u> (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	15.625		
		Rate	\$160		
		Fee	\$2,500		
				\$	2,500.00

Task 6 Construction Documents (RFP Task 9) ~4.5 mo

6.0.	<u>Meetings</u>				
	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 regularly, other consultants as needed			
	A/E Revit model updates due bi-weekly (prior to coordination meeting)				
6.1	<u>Public Works Permit (PWP) Process</u>				
	a. Submit PWP Design package				
	b. AHJ Package Review meeting				
6.2	<u>75% CD Progress Package</u> (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			
	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, AV, 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)				
6.7	Plan Review Meeting with Owner Team (9.2.7.2)	FFA/PAE			
	a. Track, respond, and incorporate owner comments				
6.8	<u>Public Works Permit (PWP) Process</u>				
	a. Submit PWP Final package				
	b. AHJ Package Review meeting				
6.9	<u>100% Construction Documents</u> / 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

Hours 31.25
Rate \$160
Fee \$5,000

\$ 5,000.00

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

7.2 Bidding

- a. Prepare Bid Set Documents
- b. Pre-Bid Conference
- c. Bid Phase A/E Services

2

7.3 ~~Value Engineering and reissuance (if all bids exceed cost estimate by 20%.~~

1.125

7.4 Public Works Permit (PWP) Process

- a. Submit Final Vellum package

7.5 LEED Design Phase Review/Complete LEED Documentation

Hours 3.125
Rate \$160
Fee \$500

\$ 500.00

Task 8 Construction Administration (RFP Task 11)

~18 mo

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

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)

9.375

a. Submittals

b. RFIs/ASIs/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

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 9.375
Rate \$160
Fee \$1,500

\$ 1,500.00

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 0
 Rate \$160
 Fee \$0

\$0 \$ -

Task 10 Project Closeout (RFP Task 11 & 14)

1 mo

- 10.1 Asset Management Plan - Review contractor and Praxis deliverables
 - a. Review Plan and evaluate maintenance and life-cycle informatior
 - b. Review Facility Information Model (FIM)
- 10.2 Final Completion Observations (RFP 14.6)
 - 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
 Reproducible Record Drawings (PDF)
 - b. Operations & Maintenance Manual and closeout document reviews
 - c. Close out coordination
- 10.5 Issue Final Payment after owner final acceptance

Praxis
 PAE/FFA/MH
 PAE/FFA/MH
 ALL TEAM

ALL TEAM

ALL TEAM
 FFA
 FFA

Hours 0
 Rate \$160
 Fee \$0

\$0 \$ -

TOTAL FEES \$ 10,660.00

EX Expenses

Total Expenses No Additional

\$ -

Contract Total \$ 10,660.00

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

Rider Levett Bucknall
 Cost Estimator

	Role	Resident Manager	Associate	Senior Cost Manager	Cost Estimator	Administrative	Duration	Subtotals
	Rate	\$230	\$225	\$200	\$150	\$95		
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							
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		
	Rate	\$230	\$225	\$200	\$150	\$95		
	Fee	\$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								
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								
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	0	0	0	0	0		

Rate	\$230	\$225	\$200	\$150	\$95		
Fee	\$0	\$0	\$0	\$0	\$0	\$	-

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 meetings) FFA/PAE/BW
 - a. 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 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
 - i. Quality Assurance Review
 - j. Draft Outline
- 3.2 Building Performance Strategies PAE/All team
 - 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
- 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
- 3.5 Review with Owner and Track comments FFA
 Incorporate Owner Comments & Issue Final Reports All team

Hours	0	0	0	0	0		
Rate	\$230	\$225	\$200	\$150	\$95		
Fee	\$0	\$0	\$0	\$0	\$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) Core design team regularly, other consultants as needed
 - c. Preliminary LEED scorecard meeting
 - 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

d. Cost estimates		8	9	10	9	3	
e. Quality Assurance, revisions, and issue package							
4.2 <u>Design Charrette One</u> : 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							
4.4 Discuss strategy for continued pool operation during construction (fee only for exploring options, full design NIC)							
4.5 <u>Design Charrette Two</u> : Preferred option (4 hours)	FFA						
a. Electronic presentation and presentation boards							
b. Charette (4 hrs)							
4.6 <u>Furniture Design</u> - 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 <u>Performance Tracking Reports</u> for Certification/Green Design Requirements	BW BW PAE						
a. LEED & Green Building Policy Checklists							
b. Energy Model for system selection (Utilizing Schematic 3D Model)							
4.8 Define scope of work for PP&R to select Commissioning Agent							
4.9 <u>Pre-Application</u> with City of Portland	AP led process AP/FFA/Vega/MR FFA/Vega/AP ALL TEAM						
a. Pre-Application package							
b. Pre-application Conference							
c. Pre-application notes response							
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							
h. Revisions and Issue Report							
4.11 Present SD package to Owner's staff	FFA						
4.12 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)							
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	\$ 17,500.00

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 design team regularly, other consultants as needed
- 5.1 MEP System Selection (RFP Task 7)
 - a. MEP Systems Focus Group Meeting with PP&R
 - b. Develop Energy Conservation Measures table
 PAE led process

	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	<u>50% Design Development Progress Package - Not priced - coordination only</u>	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)								
5.6	<u>Land Use Review - Assumed Type III Review</u> (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)								
	2. Final Package & Submittal								
	c. Public Hearing								
5.7	<u>Public Works Permit (PWP) Process</u>	Vega submitting							
	a. Submit PWP Concept package								
	b. AHJ Package Review meeting								
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	14	18	23	25	4		
	d. Quality Assurance review and checklists								
	e. Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)	All team							
5.9	<u>Performance Tracking Report Update</u> (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	14	18	23	25	4		
Rate	\$230	\$225	\$200	\$150	\$95		
Fee	\$3,220	\$4,050	\$4,600	\$3,750	\$380	\$	16,000.00

Task 6 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 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
 - a. Track, respond, and incorporate owner comments
- 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~~
 - c. ~~Security, A/V, and Technology Systems Package and Owner 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

- 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
 - a. Track, respond, and incorporate owner comments

- 6.8 Public Works Permit (PWP) Process
 - 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 9 16 17 17 4

- e. Permit Application Forms and support documentation
- 6.10. Owner review and approval

Hours	24	41	44	44	9		
Rate	\$230	\$225	\$200	\$150	\$95		
Fee	\$5,520	\$9,225	\$8,800	\$6,600	\$855	\$	31,000.00

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
 - 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	0	0	0		
Rate	\$230	\$225	\$200	\$150	\$95		
Fee	\$0	\$0	\$0	\$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
 - 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 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.)
- 8.3. Envelope testing
 - a. Mock up Reviews
 - b. Window Testing
- 8.4. 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)
 - 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. A/E Punch List Observations and Reports
 - c. Back punch walk of contractor completed punch list

MH/FFA

FFA

All Team

- d. Issue Certificate of Substantial Completion
- 8.6 Certificate of Occupancy

Hours	0	0	0	0	0		
Rate	\$230	\$225	\$200	\$150	\$95		
Fee	\$0	\$0	\$0	\$0	\$0	\$	-

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	0	0	0	0	0		
Rate	\$230	\$225	\$200	\$150	\$95		
Fee	\$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
 - a. Review Plan and evaluate maintenance and life-cycle information
 - b. Review Facility Information Model (FIM)
- 10.2 Final Completion Observations (RFP 14.6)
 - 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
 - Reproducible Record Drawings (PDF)
 - b. Operations & Maintenance Manual and closeout document reviews
 - c. Close out coordination
- 10.5 Issue Final Payment after owner final acceptance

Praxis
 PAE/FFA/MH
 PAE/FFA/MH
 ALL TEAM

 ALL TEAM
 FFA
 FFA

Hours	0	0	0	0	0		
Rate	\$230	\$225	\$200	\$150	\$95		
Fee	\$0	\$0	\$0	\$0	\$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

Portland Tree Consultancy
 Consulting Arborist

	Role	Consulting Arborist	Rate	Hours	Fee	Duration	Subtotals
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					
1.2	Client Kick-off Meeting (PP&R + FFA)	FFA					
1.3	A/E Team Kick-off Meeting (1-hour meeting)	All Team		1			
				Hours	1		
				Rate	\$115		
				Fee	\$115		\$ 115.00
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						
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						
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		14			
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	14		
				Rate	\$115		
				Fee	\$1,610		\$ 1,610.00
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 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 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
- i. Quality Assurance Review
- j. Draft Outline
- 3.2 Building Performance Strategies PAE/All team
 - 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
- 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
- 3.5 Review with Owner and Track comments FFA
 - Incorporate Owner Comments & Issue Final Reports All team

Hours 0
 Rate \$115
 Fee \$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) Core design team regularly, other consultants as needed
 - c. Preliminary LEED scorecard meeting
 - d. Sustainable Procurement kick-off meeting and documentator 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
 - d. Cost estimates
 - 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
- 4.4 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 option
 - b. Furniture Visioning Meeting with client and track comments
- 4.7 Performance Tracking Reports for Certification/Green Design Requirements
 - a. LEED & Green Building Policy Checklists BW
 - b. Energy Model for system selection (Utilizing Schematic 3D Model) BW
 - 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. 100% Schematic Design Package- Assume alternates are included 2
 - a. Drawings
 - b. Outline Specification & Narratives

	Include preliminary LEED Scorecard and high performances measures			
	c. Cost Estimate	RLB/team review		
	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	FFA		
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)			
	a. Prepare renderings and presentation materials	FFA/MR		
	b. Community input summary report	FFA		
		Hours	4	
		Rate	\$115	
		Fee	\$460	
				\$ 460.00

Task 5 Design Development (35% CDs) (RFP Tasks 6, 7, & 8) 14 wks + 2 wks owner review

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 A/E Revit model updates due bi-weekly (prior to coordination meeting	Core design team regularly, other consultants as needed		
5.1	<u>MEP System Selection</u> (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	<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	<u>50% Design Development Progress Package - Not priced - coordination only</u>	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	<u>Value Engineering, as required</u> (RFP Task 8.8)			
5.6	<u>Land Use Review - Assumed Type III Review</u> (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 (Including support drawings, tree plan, reports, and materials board	All team	4	
	2. Final Package & Submittal			
	c. Public Hearing			
5.7	<u>Public Works Permit (PWP) Process</u>	Vega submitting		

5.8	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	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	<u>Performance Tracking Report Update</u> (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		4		
			Hours	8	
			Rate	\$115	
			Fee	\$920	
					\$ 920.00

Task 6 Construction Documents (RFP Task 9) 18 weeks

6.0.	<u>Meetings</u> 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	<u>Public Works Permit (PWP) Process</u> a. Submit PWP Design package b. AHJ Package Review meeting				
6.2	<u>75% CD Progress Package</u> (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 i. Quality Assurance - copy of redline set	RLB/team review			
6.3	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 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)				
6.7	Plan Review Meeting with Owner Team (9.2.7.2) a. Track, respond, and incorporate owner comments	FFA/PAE			
6.8	<u>Public Works Permit (PWP) Process</u> 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 c. Stamped Final Design Calculations	All Team	2		

d. Updated Cost Estimate	RLB/team review		
e. Permit Application Forms and support documentation			
6.10. Owner review and approval			
	Hours	2	
	Rate	\$115	
	Fee	\$230	
			\$ 230.00

Task 7 Permitting and Bidding (RFP Task 10)

7.0. Owner-Architect Update Meetings (monthly)			
7.1 <u>Permitting</u>			
a. Submit for Permit			
b. Permit check sheet responses and tracking			
7.2 <u>Bidding</u>			
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	
	Rate	\$115	
	Fee	\$0	
			\$ -

Task 8 Construction Administration (RFP Task 11) ~12-18 mo.

8.0. <u>Meetings</u>			
a. Pre-Construction Meetings			
1. Contractor Kick-off Pre-construction Meeting		2	
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)		8	
d. Client/Vendor Furniture coordination meetings (five meetings)			
e. LEED update meetings (every 4-6 weeks 9 meetings)			
8.1 <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.)			
<u>Envelope testing</u>	MH/FFA		
a. Mock up Reviews			
b. Window Testing			
8.3 Furnishing Installation Punch List Observations	FFA		
(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	10	
	Rate	\$115	
	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 0
 Rate \$115
 Fee \$0

\$ -

Task 10 Project Closeout (RFP Task 11 & 14)

1 mo.

- 10.1 Asset Management Plan - Review contractor and Praxis deliverables
 - 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 1
 - 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
 - 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 1
 Rate \$115
 Fee \$115

\$ 115.00

TOTAL FEES \$ 4,600.00

EX Expenses

Total Expenses No Additional

Contract Total \$ 4,600.00

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

12.21.2020 DRAFT

PBS Environmental
 Geotechnical and Environmental Engineers

	Role	IH Project Manager	Principal Geotechnical Engineer	Senior Geotechnical Engineer (Engr VII)	Senior Engineering Geologist	Engineer I	Project Geologist I	Project Administrator II	Role	Role	Role	Duration	Subtotals
	Rate	\$110	\$225	\$180	\$150	\$110	\$105	\$95	\$100	\$100	\$100		
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											
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	0	0	0	0		
	Rate	\$110	\$225	\$180	\$150	\$110	\$105	\$95	\$100	\$100	\$100		
	Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	-
Task 2 Pre-Design Assessment (RFP Tasks 2 & 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 followup)												
2.4.	A/E Team Coordination Meetings (Three, 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												
d.	Deficiencies / Opportunities and Constraints												
e.	Building Assessment Report												
2.6.	Site Survey (RFP Task 4)	KPFF											
2.7.	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	40	14	32	20	76	40	16			~4 wks	
c.	Hazardous Materials Assessment and Abatement Design	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	40	14	32	20	76	40	16	0	0	0		
	Rate	\$110	\$225	\$180	\$150	\$110	\$105	\$95	\$100	\$100	\$100		
	Fee	\$4,400	\$3,150	\$5,760	\$3,000	\$8,360	\$4,200	\$1,520	\$0	\$0	\$0	\$	30,390.00
Task 3 Pre-Design Framework (RFP Task 3)												~6 wks	
	Hours	0	0	0	0	0	0	0	0	0	0		
	Rate	\$110	\$225	\$180	\$150	\$110	\$105	\$95	\$100	\$100	\$100		
	Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$	-
Task 4 Schematic Design (RFP Tasks 5 & 6)												~3.5 mo	

Task 10 Project Closeout (RFP Task 11 & 14) 1 mo

Hours	0	0	0	0	0	0	0	0	0	0	0		
Rate	\$110	\$225	\$180	\$150	\$110	\$105	\$95	\$100	\$100	\$100	\$100		
Fee	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$

TOTAL FEES \$ **30,390.00**

EX Expenses

Geotechnical Services Laboratory Testing	\$	3,300.00
Geotechnical Subcontractors	\$	20,000.00

TOTAL EXPENSES \$ **23,300.00**

SS Optional Supplemental 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 4
- 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

	Role	Frank Angelo, Principal Planner	Courtney Simms, Planner	Duration	Subtotals
	Rate	\$231	\$90		
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				
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	ABHT				
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. 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	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	0	0		
	Rate	\$231	\$90		
	Fee	\$0	\$0		\$ -

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)	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 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
- i. Quality Assurance Review
- j. Draft Outline
- 3.2 Building Performance Strategies PAE/All team
- 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
- 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
- 3.5 Review with Owner and Track comments FFA
- Incorporate Owner Comments & Issue Final Reports 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

- 4.0 Meetings
- a. Owner-Architect meetings (bi-weekly)
- b. A/E coordination meetings (weekly, 1-hour) Core design team regularly, other consultants as needed
- c. Preliminary LEED scorecard meeting
- 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
- d. Cost estimates
- 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
- 4.4 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 option
- 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
- 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. 100% Schematic Design Package - Assume alternates are included
 - a. Drawings
 - b. Outline Specification & Narratives
 - c. Cost Estimate RLB/team review
 - 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 FFA
- 4.12 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)
 - a. 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

- 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 regularly, other consultants as needed
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
 - c. ~~Energy Life-Cycle Cost Analysis~~ / ~~Life-cycle cost energy savings evaluation~~ / ~~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
 - c. Security, A/V, and Technology Systems Package and Owner Coordination
 - d. Review Meeting
 - e. Lighting and Energy Management Package and Owner Review Meeting
 - f. Interior Finishes Presentation and Owner Review Meeting
 - g. 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)
- 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			
3.	Attendance list and meeting notes	AP			
b.	Land Use Package	AP	40	120	
1.	Development, Draft Report, internal review (Including support drawings, tree plan, reports, and materials board)	All team			
2.	Final Package & Submittal				
c.	Public Hearing		8	8	
5.7	<u>Public Works Permit (PWP) Process</u>	Vega submitting			
a.	Submit PWP Concept package				
b.	AHJ Package Review meeting				
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			
d.	Quality Assurance review and checklists				
e.	Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)	All team			
5.9	<u>Performance Tracking Report Update</u> (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
					\$ 25,536.00

Task 6 Construction Documents (RFP Task 9) 18 weeks

6.0.	<u>Meetings</u>				
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	<u>Public Works Permit (PWP) Process</u>				
a.	Submit PWP Design package				
b.	AHJ Package Review meeting				
6.2	<u>75% CD Progress Package</u> (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			
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			
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 Meeting				
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)
- 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
- 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

Hours	0	0
Rate	\$231	\$90
Fee	\$0	\$0

\$ -

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

Hours	0	0
Rate	\$231	\$90
Fee	\$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
 - 2. LEED Pre-construction Meeting
 - 3. Specialty and System Pre-construction Meetings
 - b. Owner-Architect-Contractor Meetings: Weekly
 - c. Site Visits and Observation Reports - ~~four times per month min:~~ 2x per 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
 - a. Mock up Reviews
 - b. Window Testing
- 8.3 Furnishing Installation Punch List Observations FFA
 - (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 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	0	0
Rate	\$231	\$90
Fee	\$0	\$0

\$ -

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	0	0
Rate	\$231	\$90
Fee	\$0	\$0

\$0 \$ -

Task 10 Project Closeout (RFP Task 11 & 14)

1 mo.

- 10.1 Asset Management Plan - Review contractor and Praxis deliverables
 - a. Review Plan and evaluate maintenance and life-cycle informatior
 - Praxis
 - PAE/FFA/MH
 - b. Review Facility Information Model (FIM)
 - PAE/FFA/MH
- 10.2 Final Completion Observations (RFP 14.6)
 - a. Two (2) comprehensive punch list closeout observations and updates
 - ALL TEAM
- 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
 - Reproducible Record Drawings (PDF)
 - Operations & Maintenance Manual and closeout document reviews
 - ALL TEAM
 - Close out coordination
 - FFA
 - b. ALL TEAM
 - c. FFA
- 10.5 Issue Final Payment after owner final acceptance
 - FFA

Hours	0	0
Rate	\$231	\$90
Fee	\$0	\$0

\$0 \$ -

TOTAL FEES \$ 25,536.00

EX Expenses

(List expenses here and manually add amount to end of row)

\$ -

Contract Total \$ 25,536.00

a. Whole Building Energy Performance	PAE, FFA, BW	4					4
b. Site and Irrigation	Vega/MR						
c. Structural Engineering	ABHT						
d. Building Enclosure/Envelope	FFA/MH/BW	1					2
e. Interior Systems – Construction Products and Finish Materials.	FFA/BW	2	2	2			
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	4					4
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							
3.3 LEED Owner's Project Requirements (OPR) Development							
a. OPR Follow-up Meetings							7
b. OPR Summary Draft							6
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	0					
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	FFA						
Incorporate Owner Comments & Issue Final Reports	All team						
	Hours	0	23	2	2	33	0
	Rate	\$200	\$180	\$160	\$160	\$180	\$110
	Fee	\$0	\$4,140	\$320	\$320	\$5,940	\$0
							\$ 10,720.00

Task 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)	Core design team regularly, 1	14						
c. Preliminary LEED scorecard meeting		8						
d. Sustainable Procurement kick-off meeting and documentation	BW		12	12				
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	12						
d. Cost estimates		4						
e. Quality Assurance, revisions, and issue package		6						
4.2 <u>Design Charrette One</u> : Three design schemes and select preferred	FFA, BW/MR prep	8						
a. Electronic presentation and presentation boards								
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 <u>Design Charrette Two</u> : Preferred option (4 hours)	FFA							
a. Electronic presentation and presentation boards								
b. Charette (4 hrs)								
4.6 <u>Furniture Design</u> - 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 <u>Performance Tracking Reports</u> for Certification/Green Design Requirements	BW							
a. LEED & Green Building Policy Checklists	BW	8	8	8			16	
b. Energy Model for system selection (Utilizing Schematic 3D Model)	PAE							
4.8 Define scope of work for PP&R to select Commissioning Agent							8	
4.9 <u>Pre-Application</u> 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								
c. Include preliminary LEED Scorecard and high performances measures Cost Estimate	RLB/team review		15					
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	FFA							
4.12 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)								
a. Prepare renderings and presentation materials	FFA/MR							
b. Community input summary report	FFA							
	Hours	0	75	20	20	8	16	
	Rate	\$200	\$180	\$160	\$160	\$180	\$110	
	Fee	\$0	\$13,500	\$3,200	\$3,200	\$1,440	\$1,760	\$ 23,100.00

Task 5 Design Development (35% CDs) (RFP Tasks 6, 7, & 8) 14 wks + 2 wks owner review

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, A/E Revit model updates due bi-weekly (prior to coordination meeting)	Core design team regularly, r		9					
5.1 <u>MEP System Selection</u> (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			2					
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				8	8			
f. Track, respond, and incorporate owner comments for each meeting								
5.3 <u>50% Design Development Progress Package - Not priced - coordination only</u>	All team		8	4	4			
a. Drawings								
b. Outline Specifications Attach system and material packages Include draft envelope testing and commissioning requirements	PAE MH/PAE/BW					6		
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)								
5.6 <u>Land Use Review - Assumed Type III Review</u> (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 (Including support drawings, tree plan, reports, and materials board)	All team							
2.	Final Package & Submittal								
c.	Public Hearing								
5.7	<u>Public Works Permit (PWP) Process</u>	Vega submitting							
a.	Submit PWP Concept package								
b.	AHJ Package Review meeting								
5.8	<u>100% Design Development Package</u> (35% Construction Documents)		8	4	4				
a.	Drawings (RFP Task 8.11)								
b.	Specifications	RLB/team review							
c.	Cost Estimate								
d.	Quality Assurance review and checklists								
e.	Major Systems Report (RFP Task 8.11.8) (Narratives - see RFP tab)	All team	2						
5.9	<u>Performance Tracking Report Update</u> (RFP Task 8.12)								
a.	LEED & Green Building Policy Checklists		16	5	5			20	
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	0	45	21	21	6	20
			Rate	\$200	\$180	\$160	\$160	\$180	\$110
			Fee	\$0	\$8,100	\$3,360	\$3,360	\$1,080	\$2,200
								\$	18,100.00

Task 6 Construction Documents (RFP Task 9) 18 weeks

6.0.	<u>Meetings</u>								
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, t	10						
6.1	<u>Public Works Permit (PWP) Process</u>								
a.	Submit PWP Design package								
b.	AHJ Package Review meeting								
6.2	<u>75% CD Progress Package</u> (RFP Task 9.1)								
a.	Drawings								
b.	Specifications		10	8	8				
c.	Updated Performance Tracking Reports								
	LEED & Green Building Policy Checklists		12	4	4				
	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							
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	<u>95% CD Progress Package</u> (RFP Task 9.2)								
a.	Drawings								
b.	Specifications (incorporating LEED lists and list of O&M requirements)		12	4	4				
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 <u>Public Works Permit (PWP) Process</u>								
a. Submit PWP Final package								
b. AHJ Package Review meeting								
6.9 <u>100% Construction Documents</u> / 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								
	Hours	0	44	16	16	0	0	
	Rate	\$200	\$180	\$160	\$160	\$180	\$110	
	Fee	\$0	\$7,920	\$2,560	\$2,560	\$0	\$0	\$ 13,040.00

Task 7 Permitting and Bidding (RFP Task 10)

7.0. Owner-Architect Update Meetings (monthly)								
7.1 <u>Permitting</u>								
a. Submit for Permit								
b. Permit check sheet responses and tracking								
7.2 <u>Bidding</u>								
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			30				35	
	Hours	0	30	0	0	0	35	
	Rate	\$200	\$180	\$160	\$160	\$180	\$110	
	Fee	\$0	\$5,400	\$0	\$0	\$0	\$3,850	\$ 9,250.00

Task 8 Construction Administration (RFP Task 11) ~12-18 mo.

8.0. <u>Meetings</u>								
a. Pre-Construction Meetings								
1. Contractor Kick-off Pre-construction Meeting								
2. LEED Pre-construction Meeting			2				6	
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;								
LEED update meetings (every 4-6 weeks 9 meetings; and LEED Design-								
e. Phase documentation and certification review)			40	12	12		100	
8.1 <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.)								
<u>Envelope testing</u>	MH/FFA							
a. Mock up Reviews								
b. Window Testing								
8.3 Furnishing Installation Punch List Observations	FFA							
(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	0	42	12	12	0	106	
		Rate	\$200	\$180	\$160	\$160	\$180	\$110	
		Fee	\$0	\$7,560	\$1,920	\$1,920	\$0	\$11,660	\$ 23,060.00

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			25	8			40	
	b. LEED Submission								
		Hours	0	25	8	0	0	40	
		Rate	\$200	\$180	\$160	\$160	\$180	\$110	
		Fee	\$0	\$4,500	\$1,280	\$0	\$0	\$4,400	\$ 10,180.00

Task 10 Project Closeout (RFP Task 11 & 14) 1 mo.

10.1	<u>Asset Management Plan</u> - 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	<u>Final Completion Observations</u> (RFP 14.6)	ALL TEAM		5	2	2			
	a. Two (2) comprehensive punch list closeout observations and updates								
10.3	Furnishing Final Completion Observation and Closeout								
10.4	<u>Project Closeout Documents</u> (RFP 14.7)								
	a. Record Documents from contractor as-built mark-ups (RFP 14.1)	ALL TEAM							
	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	0	5	2	2	0	0	
		Rate	\$200	\$180	\$160	\$160	\$180	\$110	
		Fee	\$0	\$900	\$320	\$320	\$0	\$0	\$ 1,540.00

TOTAL FEES \$ 111,690.00

EX Expenses									
Total Expenses									\$ 1,000.00

Contract Total \$ 112,690.00

Exhibit B

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