9 October 2020

Proposal for Architectural and Engineering Services

The following is a Proposal for the performance of Architectural and Engineering Services. Upon acceptance of this Proposal by the Owner, work shall commence.

Client

Mountain View Whisman School District
1400 Montecito Ave.
Mountain View, CA 94043

Project

Various Sites
HVAC Replacement
Mountain View Whisman School District
Mountain View, CA 94043

Intentions and Considerations

- The District would like to replace the existing HVAC equipment at (8) school sites.
- Equipment will be replaced by either new split systems, new VRF units, in-kind rooftop/package units, or in-kind Bard units.
- New control systems will be installed only at the (2) Middle Schools to bring them in line with District Standards.
- It is understood that the existing ductwork will remain in place.
- All work performed will be in compliance with Title 24 Energy Conservation Standards, and will conform with the CalGreen Code Mandatory Measures.
- The District has indicated a tentative project schedule – see below.
- The District has indicated a preliminary construction budget of $12M.
- It is understood that portions of this scope of work may require submittal, review and approval by the Division of the State Architect (DSA) and will require DSA Certification.

- The scope anticipated for the project will include, but may not be limited to:
  - Bubb Elementary School
    - Replace HVAC equipment with new split systems in (20) classrooms
    - Existing control systems to remain
  - Huff Elementary School
    - Replace HVAC equipment with new split systems in (18) classrooms
    - Existing control systems to remain
  - Landels Elementary School
    - Replace HVAC equipment with new split systems in (18) classrooms
    - Existing control systems to remain
  - Mistral Elementary School
    - Replace HVAC equipment with new split systems in (16) classrooms
    - Existing control systems to remain

- Graham Middle School
  - Replace HVAC equipment with new split systems in (35) classrooms
  - Replace (6) Bard units in the portable buildings
  - (68) New control system units will be installed to bring in line with District Standards
- Theuerkauf Elementary School
  - Replace HVAC equipment with new VRF units in (26) classrooms
  - Existing control systems to remain
- Monta Loma Elementary School
  - Replace HVAC equipment with new VRF units in (24) classrooms
  - Existing control systems to remain
- Crittenden Middle School
  - Replace HVAC equipment with new VRF units in (26) classrooms
  - Replace (4) existing rooftop/ package units at the Administration Building
  - (58) New control system units will be installed to bring in line with District Standards
- Control sequencing and air re-balancing will be done to newly installed HVAC systems.

Services

DTA and their Consulting Engineers as identified, will provide the following services.

Phases / Tasks:

Phase 1: Existing Conditions Reconnaissance / As-Built Documents – NOT USED

Phase 2: Schematic Design
- Prepare drawing backgrounds for use by the Engineering consultants to prepare the HVAC Design
- Work with District and Construction Managers to obtain record documents for existing facilities and related HVAC equipment.
- Review Record Documents with Mechanical / Plumbing / Electrical Consultants and make site visits for existing conditions reconnaissance.
- Meet with District to discuss scope, intentions and coordinate recommendations from Engineers
- Prepare Schematic Design Drawings – major equipment locations and rough layout of selected mechanical systems
- Meet with the District to review Schematic Concepts and verify scope alignment with District goals, intentions, and budget.

Phase 3: Design Development
- Review Owner direction with Consultants and revise Schematics
- Design Development with notes, equipment schedules and major equipment location
- DSA coordination for determination of Project Submittal requirements and potential exemptions
- Coordinate and provide cutsheets on HVAC units and plumbing fixtures
- Present Design Development to District for direction to proceed with CD's

Phase 4: Construction Documents
- Review Owner direction with Consultants and revise Design Development
- Provide final drawings, specifications, energy compliance certification and other calculations for DSA, and/or bidding packages.
- Review final document with District prior to DSA submittal or Bidding
- Coordinate with Construction Managers for Bid Packaging and DSA Submittals (if necessary.)
- Submit to DSA (if necessary) and attend / manage DSA Back Check

Phase 5: Bidding Assistance
- Issue / Package Documents for Bidding
- Attend pre-proposal conference
- Issue bidding addenda as necessary to respond to Bidders' RFI's
- Review bid results and advise as necessary

Phase 6: Construction Administration
- Attend Pre-Construction Meeting
- Site Visits as necessary to observe Construction – assume (4) site visits for each campus the duration of the project
- Review submittals and shop drawings as necessary
- Issue Field Sketches and Clarifications as necessary during construction
- Punch List preparation and issue

Phase 7: Project Closeout
- Prepare / Coordinate As-Built Documents per District Standards
- Prepare and Submit DSA closeout documentation for any Projects / Scope that requires DSA review
- Coordinate with District's CM for Notices of Completion

Personnel

DTA Staff who will be assigned to work on this project include:
- Richard Terrones, Principal
- Alicia Ader, Project Manager
- Other Architectural Staff as needed

This proposal also includes the following Engineering Consultants. Refer to Consulting Engineers' firm details for other critical team members that will be assigned to this Project.

Consultants Included in this Proposal	
Mechanical / Plumbing	**H&M Mechanical Group** Oakland, CA John Chou, Principal / Mechanical Engineer Stephen Wafer, Plumbing Designer
Electrical	**Alliance Engineering Consultants (AEC)** Santa Clara, CA Ken Ngai, Principal / Electrical Engineer
Structural	**Duquette Engineering** Santa Clara, CA Steve Duquette, Principal / Structural Engineer

Excluded Service:

- Other Engineering disciplines not currently identified above
  Other Engineering Services can be provided as needed via a supplement to this proposal, as mutually agreed by MVWSD and DTA.
- Formal Commissioning services, beyond punch list and systems operations checks
- LEED and/or CHPS certification

Owner Provided Items

Owner shall provide the following information for Architects use:

- As-Built / Record Drawings from prior Construction – CAD and PDF format

Project Schedule

The Mountain View Whisman School District has proposed the following project timeline, as described in the RFP issued 9/18/2020.

- **Schematic Design:** October 22, 2020 – November 19, 2020
- **Design Development:** November 20, 2020 – December 30, 2020
- **Construction Documents:** December 31, 2020 – January 31, 2021
- **DSA Review / OTC / Backcheck:** February 1, 2021 – May 20, 2021
- **Construction:** June 2021 – August 2021

DTA is able to meet the District's aggressive tentative project schedule.

Current Work Commitments

DTA will have the necessary level of staffing available to immediately begin design once the project is awarded by the Board in October 2020, and will continue to have the appropriate staffing necessary complete the project.

Compensation

Architectural Fees will cover services described above except for items defined as additional services. Items considered to be additional services will be identified prior to performance of those services and will proceed only upon written authorization from the Owner.

Expenses required as part of the Project are estimated below. Reimbursable expenses not included in the contract will be billed at cost.

DTA is proposing on a lump sum basis as a maximum not-to-exceed fee. Invoicing will be sent on a monthly basis, for work completed during the prior period, as described below. Any fees remaining at the end of a Project Phase, will be invoiced as a lump sum for that remaining fee.

DTA is willing to agree to fees that are aligned with the OPSC Fee Calculator, presuming the Project type and related services are aligned with the standard type of services that the Fee Calculator generally presumes.

Fees and other charges will be billed on or about the first day of each month for services rendered during the previous month. Invoices will be due and payable within twenty days from the date of invoice. Invoices remaining unpaid for thirty days from date of invoice will be considered past due and may be cause for termination of work. Invoices remaining unpaid for forty-five days will be grounds for termination of any agreement existing between the Owner/Client and the Architect.

It is understood that the Client may wish to terminate the project for convenience at any point during the process. In such case, fees will be invoiced and due, for services rendered to that point of termination, and for any residual or shut-down expenses that may occur.

Fee Outline

The following is a lump sum proposal for **Architectural and Engineering Services.**

task		fee
Architectural Services		
Phase 1: Existing Conditions Reconnaissance / As-Built Documents		**N/A**
Phase 2: Schematic Design • Prepare backgrounds for use by Engineering Consultants • Coordinate with District / CM to obtain record documents of existing equipment • Review Record Documents with Consultants; site visits for reconnaissance • Meet with District to discuss scope, intentions and Consultant recommendations • Prepare Schematic Drawings • Meet with District to review Schematic Drawings		
	subtotal	**$15,100**
Phase 3: Design Development • Review Owner Direction with Consultants; revise Schematics • Design Dev with notes, equip. schedules, locations • DSA coordination for Submittal requirements and exemptions • Coordinate and provide cutsheets • Present DD to District for direction to proceed with CDs		
	subtotal	**$4,545**
Phase 4: Construction Documents • Review Owner direction with Consultants; revise Design Development • Provide final documents for DSA and/or bidding package • Review final documents with District prior to DSA Submittal / Bidding • Coordinate w/ CM for Bid Packaging and DSA Submittal (if necessary) • Submit to DSA (if necessary) and attend/ manage Backcheck		
	subtotal	**$8,960**
Phase 5: Bidding Assistance • Issue / Package Documents for Bidding • Attend pre-proposal conference • Issue bidding addenda as necessary, to respond to Bidders' RFI's • Review bid results and advise as necessary		
	subtotal	**$7,660**
Phase 6: Construction Administration • Attend Pre-Construction Meeting • Site Visits to observe Construction – assume (4) site visits per campus • Review submittals and shop drawings (as necessary) • Issue Field Sketches and Clarifications as necessary during construction • Punch List preparation / issue – includes Consultants Punch Review		
	subtotal	**$5,320**
Phase 7: Project Close-Out / As-Built Coordination • Prepare / Coordinate As-Built Documents per District Standards • Prepare / Submit DSA closeout documentation • Coordinate with CM for Notices of Completion		
	subtotal	**$4,380**

Consulting Engineering Services			
• Mechanical / Plumbing Engineering	proposal	$115,000	
• Electrical Engineering	allowance	$50,000	
• Structural Engineering	allowance	$10,000	
	subtotal		**$175,000**
Reimbursable Expenses:	estimate		**$2,000**
• Printing, Deliveries, etc.			
	Lump Sum Total		**$222,965**

Rates

Project services will be based on the following DTA billing rates.

Billing Rates		
Principal	per hour	$270
Project Architect	per hour	$175
Staff / Clerical	per hour	$115

Authorization to Proceed

Signature indicates acceptance of terms of this agreement and authorization for the Architect to proceed with the work described herein. Once a signed Proposal is received, we will schedule the work and proceed within two weeks' time.

_____

Client Date

Sincerely,

10/09/2020

_____

DTA Date
R. Terrones, License #C24686

Personnel

Richard Terrones, Architect

Vice President

Richard is a partner and manages our Burlingame office. He is an Architect versed in a full range of services including principal level consulting for Design, Planning, Construction Documents, Construction Administration and general Project Management. He is a Burlingame Resident, and has been a Planning Commissioner for Burlingame for the past 12+ years

Richard will be the Principal-in-Charge and oversee general project direction and strategies for the projects. He will represent DTA during all Staff and Client or User Engagement that may be necessary.

Richard successfully co-developed, and is managing and overseeing the current Building Program for the Burlingame School District. He has also assisted with the management of the Campbell Union High School District Program for over fifteen years. He is currently overseeing multiple projects for the Mountain View Whisman School District, totaling more than $50M in construction.

Richard has vast experience in dealing with the many agencies that are involved in public projects, and has developed a good working relationship with various government agencies throughout the Bay Area.

Experience

- **20 years of Professional Experience in Architecture, including Project Design, Project Management and Program Management**
- **Specialization in K-12 Public School Design and Construction Administration in California. Personally designed over half a million square feet of classroom modernizations in the past 15 years alone**
- **Developed and implemented Logistics Program for multiple project, multi-million dollar, public school building program for the Campbell Union High School District, San Jose, CA**
- **Currently managing the multi-million dollar, multiple project Program for the Burlingame School District, Burlingame, CA**

Notable Projects

- **Independence High School Modernization of Buildings G, H and L**
  Modernization of existing Classrooms for Alternative School (Charter) Programs at existing Campus
- **Vargas Elementary School New Campus**
  New Construction for re-emerging neighborhood K-5 Elementary School
- **Stevenson Elementary School Entire Site Reconstruction**
  Re-building of the entire School - removing portable classrooms and an undersized Library, and providing a new standard Multiuse Room Facility
- **Theuerkauf Elementary School Alterations & Addition**
  Interior and exterior alterations to Classrooms, Administration Offices, Student and Staff Restrooms, the Multi-use Room and the serving Kitchen

Education

Bachelor of Arts: Architecture,
University of California, Berkeley

Registration and Affiliations

Licensed Architect in California C24686
Issue Date: 11/23/1993

LEED GA

Professional Memberships

Congress for New Urbanism
Coalition for Adequate School Housing (CASH)
City of Burlingame, Planning Commissioner
Member of Downtown Burlingame Citizens Advisory Committee

References

Julio Lucas
Senior Manager of Bond Program
East Side Union High School District
p: 408.347.5102

Tim Ryan
Director of Facilities, Retired
Burlingame School District
p: 415.299.3816

Alicia Ader

Project Manager / Production

Alicia has four years of experience working in Public School Construction. She received her Bachelor of Architecture from the University of Nevada, Las Vegas and a Masters of Architecture from Massachusetts College of Art and Design. She is an expert in construction and design documentation and construction administration methods.

Alicia was raised in Silicon Valley, attending public schools in the Cupertino Union School District and the Fremont Union High School District, and is very familiar with life on the San Francisco Peninsula.

For the these projects, Alicia will be assisting with production and consultant coordination. As projects move towards fruition, she will oversee construction drawings, agency approvals, and construction administration.

Education

Bachelor of Architecture
University of Nevada, Las Vegas

Master of Architecture
Massachusetts College of Art and Design

Reference:
Tim Ryan
Director of Facilities, Retired
Burlingame School District
p: 415.299.3816

Dwight Ortmann
President
Beals Martin, Inc.
p: 650.207.9027

Experience

- **Vargas Elementary School New Campus**
  New Construction for re-emerging neighborhood K-5 Elementary School
- **Stevenson Elementary School New Campus**
  Managed Construction Documents and is overseeing construction for new $20M Elementary School Campus
- **Burlingame Intermediate School Library / Science Building Modernization**
  Managing production for $4M renovation of Library and Science Classrooms
- **Burlingame School District Measures M & O Program Management**
  Assisting with Program Management for Measure M's $56M in Bond Projects and Measure O's additional $97M Bond Program

H&M Mechanical Group

Mechanical Engineers

Company Profile

H&M Mechanical Group was founded in 1984 by Gary Henning and Mel Miyakado. We are a mechanical engineering organization that provides Heating, Ventilating and Air Conditioning Systems design, Plumbing System design, Fire Sprinkler System design and Energy Analysis.

H&M's engineering approach is streamlined and fundamental, not elaborate and theoretical. When designing a system, the elements are based on budget, type of occupancy, and energy usage. Incorporating these considerations in the building design is Leadership in Energy and Environmental Design (LEED), Collaborative for High Performance Schools (CHPS), and CalGreen, which have set the parameters for building designs. With LEED Accredited Professional personnel, H&M is familiar with these requirements while working on projects which have gone through this certification process.

Project Schedule

H&M Mechanical Group will be able to fulfill the tentative project schedule(s).

Current Work Commitments

Currently, H&M has two projects which have construction document due dates into mid-October. The remainder of our project load requires punch lists to be performed and close out of said projects. During the district's SD and DD due dates, we feel our workload will be about 10% during this time frame and will be manageable.

H&M Mechanical Group

Mechanical Engineers

John Chou, PE, LEED AP

Principal

John became one of the company's principals in April of 2012. He joined H&M Mechanical Group 21 years ago, and is a consummate engineer working on multiple projects in the design of heating, ventilating, and air conditioning. John is instrumental in the development and implementation of AutoCAD and Revit standards and details.

Prior to joining H&M Mechanical Group, John was employed by an Energy Savings Service Company providing recommendations as to where energy costs could be saved. Because of his energy conservation background, John persistently researched energy savings on designs prior to LEED, CHPS, Green Building Design, and other energy groups. One of his projects, Maritime Child Care Center, a historic building, received an LEED Gold award. Main Street Village Apartments was named Project of the Quarter by the California Multi-Family New Homes (CMFNH) organization. This project was designed over 50% above 2005 Title 24 which qualified the project for an Energy Rebate from PG&E. In addition, there are several other projects John has worked on which have received substantial Energy Rebates from PG&E.

A vital element to John's repertoire is continuing his education to stay current, as he attends a variety of seminars and tests to remain updated on Energy Codes and code changes that will impact the future. He also remains up to date on changes in system design and new technologies in the HVAC industry.

During his time away from the office, he can be found on his snowboard on the slopes of Tahoe, riding his bicycle along the trails of San Ramon, on the golf course or in the kitchen cooking for his wife and son. John is a man of many talents and quite a cook.

Education

B.S. Mechanical Engineering
California Polytechnic State University, San Luis Obispo.

Registration and Affiliations

P.E. California 2008

P.E. Hawaii 2013

LEED Accredited Professional

Certified Energy Plans Examiner (CEPE), 2012, Lic. R08-12-2115

Experience

- **Stevenson Elementary School, MVWSD**
  Replace the existing HVAC unit with new split system at remodeled Library; and new packaged AC unit and kitchen ventilation system at remodeled MUR / Kitchen
- **Woodside Elementary School, Mt. Diablo Unified School District**
  Replace existing HVAC unit with new split system for the whole campus and new campus EMS
- **Spangler Elementary School, Milpitas Unified School District**
  Replace existing rooftop packaged unit with new higher efficient rooftop packaged unit for all Classrooms

H&M Mechanical Group

Mechanical Engineers

Stephen Wafer

Plumbing Designer

Stephen joined H&M Mechanical Group in the Fall of 2014 and joins us with experience from ACCO Engineered Systems and WSP Flack & Kurtz. He has worked on projects very similar to what our group has been involved in: high-rise office and retail buildings, hospitals, R&D and correctional facilities, schools, and a myriad of others. With over 20 years of design experience, we are excited to welcome Steve to work and interact with our clients.

Steve is an Associate member of American Society of Plumbing Engineers in the San Francisco Chapter.

When not working, Steve leads a local Bible Talk group and enjoys spending time with his grandkids. As a previous football coach, Steve is an avid sports fan and attends many sporting events.

Education

Computer Aided Design/ Drafting,
Silicon Valley College

ASPE Plumbing Design,
San Francisco City College

Certifications

Plumbing Design, 2003

Experience

- **Theuerkauf Elementary School, MVWSD**
  Design a complete HVAC, Plumbing and fire sprinkler system for a new MUR, and replace existing HVAC unit with new split system at remodeled Library
- **Crittendent Middle School, MVWSD**
  Design a complete HVAC, Plumbing and fire sprinkler system for a new Auditorium building and a new Renovation Center (Library/Classroom building); replace existing HVAC unit with new split unit in a few classrooms in Building 200; site EMS control upgrade and various HVAC scope in Buildings 100, 300, 500, 700 and 900
- **Vargas Elementary School, MVWSD**
  Design a complete HVAC, Plumbing and fire sprinkler system for a new MUR Building, and replace existing HVAC unit with new split system at remodeled Library Building

AEC

Electrical Engineers

Company Profile

Alliance Engineering Consultants, Inc. is an electrical engineering firm headquartered in Santa Clara, California. The firm provides a broad range of electrical engineering services for projects in educational, medical, detention, commercial, government facilities, high tech, electronics, aerospace, biotechnology, pharmaceutical, transportation, infrastructure, parks, streetscapes, utilities, and other technical related industries.

The firm has the capabilities and experience to engineer and design site electrical and communications systems, medium and low voltage power distribution systems, interior and exterior lighting and control systems, emergency power generation and distribution, energy management and control systems, life safety, security and communications systems, and electric utility systems.

Alliance Engineering Consultants, Inc. has established an excellent record of performance in providing cost effective professional services of the highest quality and completing each project efficiently and timely. Our excellent record of performance is evidenced by the high percentage of work from our repeat clients. The firm has a diversified client base.

Kenneth Ngai, PE, LEED AP

Principal

Kenneth Ngai has thirty years of broad experience in management, engineering, design and construction supervision of electrical systems for educational, institutional, high technology, R&D, industrial, clean rooms and laboratories, government, transportation, infrastructure, electric utilities, sport facilities, parks, streetscapes, and commercial projects.

Education

Bachelor of Science
Purdue University

Registration and Affiliations

Electrical Engineer
CA No. 11537

Member of IEEE, IES, NFPA, US-GBC and BICSI

Experience

- **Vargas Elementary School New Campus**
  Mountain View Whisman School District
- **Theuerkauf Elementary School Additions & Alterations**
  Mountain View Whisman School District
- **Mount Pleasant High School Modernization, Buildings 300, 400 & 500**
  East Side Union High School District
- **Newark Memorial High School, New Student Events Center & Gymnasium**
  Newark Unified School District
- **Sir Francis Drake HS Modernization**
  Tamalpais Union High School District
- **District-wide Electrical & Low Voltage Upgrade**
  Jefferson Union School District

Duquette Engineering

Structural Engineers

Company Profile

Duquette Engineering is a full-service engineering company specializing in residential and small to mid-size commercial projects. Steven Duquette started Duquette Engineering as a sole proprietor in January of 1990. Currently our staff consists of 1 structural engineer, 1 civil engineer, 4 engineering assistants, 2 CAD drafters and 1 office support staff.

Duquette Engineering has a variety of experience working with architects, building owners, public agencies, and developers on a wide variety of projects, which include residential, commercial, educational, and historic buildings. We have thirty years of specialized experience in the rehabilitation, seismic retrofit, and modification of existing structures. Our varied experience with gives Duquette Engineering a unique ability to provide the proper level of engineering to both large and small projects.

Steven Duquette, PE

Principal

Mr. Duquette has been providing structural engineering services as a licensed structural engineer since 1990. As President of Duquette Engineering he has become experienced in all areas of an engineering practice, client development, project management and employee relations, in addition to experience with providing structural analysis, construction documents, and quality assurance.

Education

B.S. Architectural Engineering
California Polytechnic State University, San Luis Obispo.

Registration and Affiliations

Structural Engineer
CA No. S3019

Civil Engineer
CA No. 38080

Experience

- Pioneer High School Addition
- San Jose City College Boiler Room Remodel
- Andrew Hill High School Cable Structure
- Downtown College Prep. Charter School
- Silver Creek High School Building N Modernization
- Foothill High School Building F Modernization
- Gatos High School Music Room
- Fisher Middle School Gym
- Evergreen HS Special Education Classroom
- Independence HS - Building J Modernization
- ESUHSD Foothill High School Building F Remodel
- Oak Grove High School Building "R"