

## RESOLUTION NO. 07-2024

A RESOLUTION AUTHORIZING THE CITY MANAGER TO ENTER INTO A PROFESSIONAL SERVICES AGREEMENT BY AND BETWEEN THE CITY OF MONROE AND BURGESS & NIPLE/KZF DESIGN JOINT VENTURE FOR A CRITERIA ARCHITECT FOR THE NEW PUBLIC WORKS FACILITY AND FIRE DEPARTMENT STATION 62 UPGRADES.

WHEREAS, the use of a criteria architect for the new public works facility and the addition and renovation of Fire Station 62 is determined to be in the best interest of City to move forward with these projects.

NOW, THEREFORE, BE IT RESOLVED BY THE COUNCIL OF THE CITY OF MONROE, STATE OF OHIO, THAT:


SECTION 1: The City Manager is hereby authorized to enter into a professional services agreement by and between the City of Monroe and Burgess & Niple/KZF Design Joint Venture for a criteria architect for the new public works facility and fire department station 62 upgrades. The terms and conditions of this agreement are set forth on Exhibit "A" attached hereto and made a part hereof.

SECTION 2: This measure shall take effect and be in full force from and after its passage pursuant to Section 7.08 (C) of the Charter.

PASSED: February 13, 2024

ATTEST:

APPROVED:

  
Clerk of Council

  
Mayor

I, the undersigned Clerk of Council of the city of Monroe, Ohio, hereby certify the foregoing (ordinance or resolution) was published as required by Section 7.16 of the Charter of the City of Monroe.

  
Clerk of Council  
City of Monroe, Ohio

This legislation was enacted in an open meeting pursuant to the terms and provisions of the Sunshine Law, Section 121.22 of the Ohio Revised Code.

Exhibit "A" Res No. 07-2024

**Date:** 15 January, 2024

**Name** ▪ Gary Morton, Public Works Director

**Address** ▪

City of Monroe  
233 South Main Street  
Monroe, Ohio 45050

**Subject:** Proposal for Criteria Architect / Engineer Services  
New Public Works Facility  
Fire Station #62 Expansion / Renovation  
City of Monroe, OH

Gary,

The Burgess & Niple / KZF Design Joint Venture (BN-KZF JV) is pleased to provide this proposal for professional design services for the above referenced project. This proposal is based on the Request for Qualifications (RFQ), dated August 10, 2024 provided by the City of Monroe (the Client), as well as subsequent discussions with City of Monroe staff clarifying the required project scope of services.

The project scope is presumed to be substantially compliant, as defined in the RFQ as well as supplemental information as noted in Attachment A "Criteria AE Project Scope Definition, Scope of Services and Deliverable Summary" included in this proposal.

**Anticipated Project Schedule:**

<u>Task</u>	<u>Start Date</u>	<u>Completion Date</u>
Project Kickoff:	February 1, 2024	
Programming Phase:	February 1, 2024	March 30, 2024
Schematic Design Phase:	April 1, 2024	June 15, 2024
Design Development Phase:	June 16, 2024	Sept. 30, 2024
Design-Builder Procurement Phase:	October 1, 2024	January 30, 2025
Bridging Phase:	February 1, 2025	February 28, 2025
DB Construction Documents Phase:	March 1, 2025	August 30, 2025
DB Bidding Phase:	September 1, 2025	October 30, 2025
Construction Phase:	November 1, 2025	November 1, 2026

**Basic Service Fee:**

For Basic Services provided by BN-KZF JV and all Consultants, the Client shall pay BN-KZF JV the Basic Service Fee of \$1,099,000 which shall not be exceeded without the prior written approval of the Client, and an amendment to this Agreement. The Basic Service Fee is based on the scope of services defined herein.

Project Stage/Task	Fee
Programming Phase	\$100,000
Schematic Design Phase	\$250,000
Design Development Phase	\$295,000
Design-Builder Procurement Phase	\$34,000
Bridging Phase	\$50,000
DB Construction Documents Phase	\$84,000
DB Bidding Phase	\$34,000
Construction Phase	\$252,000
<b>Total Basic Service Fee</b>	<b>\$1,099,000</b>

### Reimbursable Expenses

Expenses (plotting, printing, shipping / delivery, mileage) will be billed per the terms and conditions noted herein. Based on BN-KZF JV's experience with projects of this type, scale and scope, we estimate that the total for reimbursable expenses will be approximately \$5,000.00, which is NOT included in the Basic Service Fee. Reimbursable expenses will be billed at cost plus a 10% administrative fee.

### Additional Services

The scope of services as defined herein is expected to be sufficient to complete the identified phase(s) of the project. If in the course of developing the project other services are required or a modification to the scope of services is necessary, BN-KZF JV will submit a proposal for additional services. Whenever possible, the change in service will be identified prior to the performance of the service, and we will obtain Clients written approval prior to proceeding. However, if it is necessary to keep the project on schedule, we may proceed with additional services based on Client's email authorization of the change in scope only.

If additional services are requested, BN-KZF JV will offer these on an hourly rate basis, using the BN-KZF JV's standard hourly rates or on an agreed-upon stipulated fee. BN-KZF JV 2024 Hourly Rate Schedule as included in this proposal.

### Exclusions / Clarifications

1. Attendance at additional meetings, presentations, and / or open houses not specifically defined herein, or in excess of those noted herein.
2. Additional site observation visits in excess of those noted as included in the Basic Services
3. Site survey and final re-plat documents for proposed project sites is not included.
4. Individual surveying, interviews or collection of data related to programming from staff members beyond key department staff or as noted herein.
5. Traffic studies or reports which may be required by the local authorities having jurisdiction is not included.
6. Invasive or destructive investigations of existing facilities is not included.
7. Hazardous materials investigation, testing or reports is not included.
8. Any identified environmental investigation and / or remediation services which may be required by any AHJ (i.e. "blue line" stream, wetlands, protected species, etc.) are not included.
9. Detailed review of existing building systems/components is not included.
10. Topographic surveying is not included.

11. Detailed energy modeling is not included.
12. Deep foundations or non-standard / unconventional foundation design services are not included.
13. Radon mitigation systems design services are not included.
14. Building or zoning code variance approval procedures are not included.
15. Value engineering services for major systems (structural and / or MEP) after the completion of the Schematic Design Phase services are not included.
16. Renderings, models or similar presentation documents unless specifically noted otherwise herein. As part of our Basic Services, BN-KZF JV proposes to prepare our designs and documents in Revit software, which facilitates the production of basic 3D images of the building's exterior elevations for diagrammatic use during design activities. Detailed renderings, animations or other or similar detailed 3D deliverables are not included, however can be provided as requested for an additional fee.
17. Geotechnical investigation, testing or reports are not included.
18. LEED administrative, studies, models, submittals, calculations or approvals is not included.
19. Investigation, surveying, analysis, studies or reporting for any public utilities, roadways or similar infrastructure is not included.
20. Quality control testing or special inspections and related reports or documentation which may be required by the AHJ and / or local codes are not included.
21. Project start-up or commissioning procedures, services or reports or preparation of operations manuals, vendor data, warranty information or similar are not included.
22. Any significant modification to the project budget (increase or decrease) greater than 5% will require additional service (for increased budget / cost) or a fee reduction (for reduced budget / cost). Increase or decrease shall be proportional to the Basic Service Fee as related to the budget stated in this proposal.
23. Additional administrative time / costs due to the extension of project delivery schedule (design or construction) beyond that noted herein are not included.
24. Consultation or recommendations related to repair / replacement of work (existing or new) damaged or incorrectly installed during construction is not included.
25. Revisions to the deliverables inconsistent with previous instructions or approvals by the Client, and/or resultant to Client's (or client's Consultants, Owners) failure to render decisions in a timely manner.

**Client Provided Items:**

1. Site survey and final re-plat documents for proposed site.
2. Geotechnical report including recommendations for foundation improvements, foundation type recommendations, soil capacities and seismic conditions at each site.
3. "Front end" general conditions / requirements, and / or procurement specifications for inclusion in Project Manuals as part of the Design-Build RFQ / P document.
4. Budget resolution at the end of each Basic Service Phase (approve, raise budget, or reduce scope) prior to authorizing commencement of subsequent phase.
5. General program information as required by BN-KZF JV for the proposed functions to be housed in the proposed projects.
6. Detailed information including specifications, design requirements / criteria and coordination for Client furnished specialized equipment to be housed in the proposed projects.
7. Access to the project site for review and observation of conditions

8. Computer / Data / Telephone / Telecom / Audio-Video / CCTV / Security / Specialty and / or Emergency Communications systems design, and documents as required by project.
9. Required special inspections and / or construction materials testing services.

**Proposed Terms and Conditions:**

BN-KZF JV shall invoice every four weeks for the amounts due for professional services rendered and expenses incurred. In addition to the compensation for professional services, BN-KZF JV shall be reimbursed for out-of-pocket expenses (printing / plotting, mailing / overnight shipping, permit fees, mileage). Client shall pay BN-KZF JV the full amount due upon receipt of invoice. All past due amounts shall bear interest at the rate of one and one-half percent (1-1/2%) per month compounded monthly after thirty days. BN-KZF JV reserves the right to suspend services and / or not issue documents if the Clients account is past due.

The Client agrees that to the fullest extent permitted by law, BN-KZF JV's total liability to the Client for any and all injuries, claims, losses, expenses, damages, arising out of this Agreement from any cause or causes shall not exceed \$2,000,000 aggregate / \$1,000,000 per occurrence from BN-KZF JV's standard professional liability and commercial general insurance coverages for this project. Upon request, BN-KZF JV will provide a standard ACORD statement of BN-KZF JV's policy limits for this project, including the Client as an additional insured on the policy, which will be maintained for the duration of the project design and construction.

It is recognized that BN-KZF JV does not have control over the cost of labor, materials or equipment, over the Contractor's methods of determining bid prices, or over competitive bidding, market or negotiating conditions. Accordingly, BN-KZF JV cannot and does not warrant or represent that bids or negotiated prices will not vary from any Opinion of Probable Construction Cost or evaluation prepared or agreed to by BN-KZF JV.

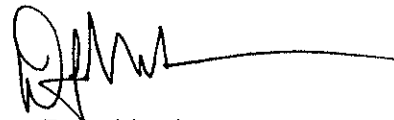
If the terms and conditions stated herein are acceptable to you, BN-KZF JV expects that a final professional services agreement, based on AIA Standard Contracts, will be executed with the Client, with this proposal and its attachments included for reference.

Thank you for selecting the BN-KZF JV team as your professional design consultant for this project. Please do not hesitate to reach out to me directly if you have questions or wish to discuss this proposal further.

Sincerely,  
KZF Design Inc.



Scott F. Csendes, A.I.A., P.M.P.  
Vice President – Director, Civic and Public Safety Division



Doug Marsh  
President/CEO

## B&N / KZF JV - 2024 Hourly Rate Schedule

<b>Category</b>	<b>Rate</b>
Architect Level 1	\$137
Architect Level 2	\$190
Architect Level 3	\$210
Construction Administrator	\$220
Civil Designer Level 1	\$126
Civil Designer Level 3	\$168
Civil Engineer Level 1	\$147
Civil Engineer Level 3	\$200
Clerical	\$115
Designer Level 1	\$95
Designer Level 2	\$137
Designer Level 3	\$179
Electrical Designer 1	\$126
Electrical Designer 2	\$158
Electrical Designer 3	\$168
Electrical Engineer Level 1	\$179
Electrical Engineer Level 3	\$305
Interior Designer Level 1	\$105
Interior Designer Level 3	\$230
Mechanical Designer Level 2	\$179
Mechanical Engineer Level 2	\$179
Mechanical Engineer Level 3	\$252
Planner Level 1	\$115
Planner Level 3	\$220
Principal	\$400
Project Manager Level 1	\$147
Project Manager Level 2	\$200
Project Manager Level 3	\$230
Structural Designer Level 2	\$126
Structural Designer Level 3	\$147
Structural Engineer Level 2	\$179
Structural Engineer Level 3	\$220

Rates Effective through 12/31/2024

Project Information	Public Works	
	Scope of Services	Deliverables Notes
	<p>&gt;\$16M to \$18M construction budget, includes ALL facility equipment, excludes AE fees &amp; similar soft costs (geotechnical services, special inspection services, DB fees, permit fees, bonding / insurance, commissioning &amp; similar).</p> <p>&gt;Design in capability for future growth in Office / Admin Area.</p> <p>&gt;Include a mechanic shop area to perform service on PW equipment / vehicles including 4 service bays.</p> <p>&gt;Include a 5,000 ton salt storage capacity &amp; brine mixing area</p> <p>&gt;Equipment storage can be provided in a variety of environments appropriate for the equipment being stored (covered &amp; warm, covered &amp; cold, open &amp; cold, etc.)</p> <p>&gt;Key spaces / areas to be included:</p> <ol style="list-style-type: none"><li>1. Sign Shop</li><li>2. Space for Water Department including EPA testing lab.</li><li>3. Space for Future Parks &amp; Rec Department</li><li>4. Consider Space for possible inclusion of Development Department</li></ol> <p>&gt;Scope shall include the study of both east &amp; west sites on Clark</p> <p>&gt;Road Design to extend Clark as needed including utilities shall be included in the Scope (which is expected to be generally limited)</p> <p>&gt;Site layout included in final Criteria Package shall allow flexibility for reconfiguration by the DB Teams as a betterment.</p> <p>&gt;Total program expected to be approximately 100,000sf.</p> <p>&gt;Developed project site expected to be approximately 15 acres.</p> <p>&gt;Project expected to be delivered in a Design-Build model, with a 2-step procurement process</p>	

	Scope of Services	Criteria AE Team Leading	Deliverables Notes
Programming	<ul style="list-style-type: none"><li>&gt;Assist the Client in procurement of geotechnical services</li><li>&gt;Perform site due diligence / analysis services including contacting gas, electric, water &amp; sanitary providers to confirm availability &amp; requirements for services to both sites.</li><li>&gt;Attend kick-off meeting with key PW stakeholders to review project goals, budget, schedule, requirements &amp; program.</li><li>&gt;Distribute PW facility questionnaire to key stakeholders.</li><li>&gt;Collect, analyze questionnaires &amp; develop preliminary project program (building &amp; site).</li><li>&gt;Meet with Client to review program questions, review room diagrams, review site elements / diagrams for program spaces &amp; areas.</li><li>&gt;Meet with PW staff (in multiple groups) to review project scope, program, schedules including engaging with groups to gain feedback &amp; input on proposed project program &amp; design. Includes up to 3 group meetings.</li><li>&gt;Revise preliminary program &amp; issue final project program including room diagrams.</li><li>&gt;Develop a preliminary project budget including hard and soft costs to be used for comparative analysis during design phases.</li><li>&gt;Develop a preliminary project schedule including key milestones &amp; critical path items including anticipated construction phase activities.</li><li>&gt;Identify critical project criteria items (materials, systems, equipment) required to be detailed in the final criteria documents.</li></ul>	<p><b>General -</b></p> <ul style="list-style-type: none"><li>&gt;PW facility questionnaire</li><li>&gt;Meeting minutes from scheduled project meetings.</li><li>&gt;Project Budget Format Report &amp; Initial budget breakdown</li><li>&gt;Initial General Project Schedule including primary project phases.</li></ul> <p><b>Site / Civil -</b></p> <ul style="list-style-type: none"><li>&gt;Report confirming available utilities to site &amp; utility provider required service configurations.</li><li>&gt;Zoning Summary Report.</li><li>&gt;Narrative summary of zoning required landscaping improvements.</li></ul> <p><b>Architectural -</b></p> <ul style="list-style-type: none"><li>&gt;Final Project Program</li><li>&gt;Room Diagrams for Program Spaces</li><li>&gt;Preliminary Room Data Sheets (Primary Spaces only this Phase)</li></ul> <p><b>FF&amp;E -</b></p> <ul style="list-style-type: none"><li>&gt;Preliminary Equipment List of anticipated Owner Furnished Items.</li></ul> <p><b>Structural -</b></p> <ul style="list-style-type: none"><li>&gt;Draft RFP for geotechnical services.</li></ul> <p><b>Mechanical - None</b></p> <p><b>Electrical - None</b></p> <p><b>Plumbing - None</b></p> <p><b>Fire Protection - None</b></p>	
Schematic Design	<ul style="list-style-type: none"><li>&gt;Propose schematic design solutions and identify design strategy / options for the site layout (Includes both east &amp; west Clark sites).</li><li>&gt;Propose schematic design solutions and identify design strategy / options for the building shell / envelope</li><li>&gt;Propose schematic design solutions and identify design strategy / options for the building layout.</li><li>&gt;Propose schematic design solutions and identify design strategy / options for the building structural systems</li><li>&gt;Propose schematic design solutions and identify design strategy / options for the building MEP systems. Includes presentation / review of optional mechanical system types with Client.</li><li>&gt;Develop project equipment list including (OFCI, OFCI &amp; CFCI items).</li><li>&gt;Prepare and issue a Preliminary Schematic Design Package including architectural, structural, civil, and MEP documents at 75% complete of the Schematic Design Phase to allow review and approval by the Client. Subsequently make revisions based on review comments received. Includes meeting to review Client comments.</li><li>&gt;Preparation of project specification list of contents for anticipated project materials, components, systems.</li><li>&gt;Issue a Final Schematic Design Package including architectural, structural, civil, and MEP documents for submittal to, and approval by the Client.</li><li>&gt;Based on Final Schematic Design Package prepare an Opinion of Anticipated Construction Cost.</li><li>&gt;Update preliminary project schedule.</li><li>&gt;Participate in regular design meetings (anticipated to be six (6) this phase to review regular design progress, identified issues, and general coordination with the Client</li></ul>	<p><b>General -</b></p> <ul style="list-style-type: none"><li>&gt;75% Schematic Design Review Submittal (containing info noted below)</li><li>&gt;100% Schematic Design Review Submittal (containing info noted below)</li><li>&gt;Meeting minutes from scheduled project meetings.</li><li>&gt;Updated Project Budget</li><li>&gt;Updated Project Schedule.</li></ul> <p><b>Site / Civil -</b></p> <ul style="list-style-type: none"><li>&gt;Preliminary design options / studies (layout plan).</li><li>&gt;Narrative report of preliminary civil design requirements.</li><li>&gt;Identification of required civil specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</li></ul> <p><b>Architectural -</b></p> <ul style="list-style-type: none"><li>&gt;Preliminary building floor plan options / studies.</li><li>&gt;Preliminary interior elevation options / studies.</li><li>&gt;Preliminary building shell wall sections / studies.</li><li>&gt;Narrative report of selected building shell system.</li><li>&gt;Further Developed Room Data Sheets (RDSs) defining anticipated physical characteristics / finishes &amp; specified environmental requirements.</li><li>&gt;Identification of required architectural specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</li></ul> <p><b>FF&amp;E -</b></p> <ul style="list-style-type: none"><li>&gt;Preliminary Equipment List including A/CCHV, OFCI &amp; CFCI items.</li></ul> <p><b>Structural -</b></p> <ul style="list-style-type: none"><li>&gt;Preliminary building structural foundation &amp; framing plans, details.</li><li>&gt;Narrative report of selected structural system.</li><li>&gt;Identification of required structural specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</li></ul> <p><b>Mechanical -</b></p> <ul style="list-style-type: none"><li>&gt;Presentation of good / better / best optional mechanical systems.</li><li>&gt;Narrative report of selected mechanical system.</li><li>&gt;Identification of required mechanical specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</li></ul> <p><b>Electrical -</b></p> <ul style="list-style-type: none"><li>&gt;Narrative report of anticipated electrical service &amp; system strategy, including description of primary system components.</li><li>&gt;Identification of required electrical specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</li></ul> <p><b>Plumbing -</b></p> <ul style="list-style-type: none"><li>&gt;Narrative report of anticipated plumbing service &amp; system strategy, including description of primary system components.</li><li>&gt;Identification of required plumbing specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</li></ul> <p><b>Fire Protection -</b></p> <ul style="list-style-type: none"><li>&gt;Narrative report of anticipated fire protection service &amp; system strategy, including description of primary system components.</li><li>&gt;Identification of required fire protection specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</li></ul>	

Design Development (Start)	<p>&gt;Building and zoning code due diligence review and analysis, including meeting with governing department(s) to review any identified potential code concerns / limitations.</p> <p>&gt;Continue design development of approved schematic design solution for the selected site layout (includes one selected site - east or west).</p> <p>&gt;Continue design development of approved schematic design solution for the selected building shell / envelope systems.</p> <p>&gt;Continue design development of approved schematic design solutions for the selected building plan layout.</p> <p>&gt;Continue design development of approved schematic design solutions for the selected building structural systems.</p> <p>&gt;Continue design development of approved schematic design solutions for the selected building MEP systems.</p> <p>&gt;Finalize a project equipment list including (OFOI, OFCI &amp; CFCl items).</p> <p>&gt;Prepare and Issue a Preliminary Design Development Package including architectural, structural, civil, and MEP documents at 75% complete of the Design Development Phase to allow review and approval by the Client. Subsequently make revisions based on review comments received. Includes meeting to review Client comments.</p> <p>&gt;Preparation of project criteria specifications for anticipated project materials, components, systems.</p> <p>&gt;Issue a Final Design Development Package including architectural, structural, civil, and MEP documents for submittal to, and approval by the Client. (To be used as the Criteria Documents).</p> <p>&gt;Based on Final Design Development Package update the Schematic Design Opinion of Anticipated Construction Cost.</p> <p>&gt;Participate in regular design meetings (anticipated to be six (6) this phase to review regular design progress, identified issues, and general coordination with the Client</p>	<p><b>General -</b></p> <ul style="list-style-type: none"> <li>&gt;75% Design Development Review Submittal (containing info noted below)</li> <li>&gt;100% Design Development Review Submittal (containing info noted below)</li> <li>&gt;Meeting minutes from scheduled project meetings</li> <li>&gt;Updated Project Budget</li> <li>&gt;Updated Project Schedule</li> <li>&gt;Final RFP for geotechnical services</li> <li>&gt;Site / C&amp;E -</li> <li>&gt;Final site design including site plan, utility plan, conceptual topog plan.</li> <li>&gt;Narrative report of final civil design requirements supporting drawings.</li> <li>&gt;Required civil specification sections (presumed to be 90% performance spec &amp; 10% product specification type)</li> <li><b>Architectural -</b></li> <li>&gt;Building Floor plan, equipment layout plan, reflected ceiling plan</li> <li>&gt;Interior elevations.</li> <li>&gt;Building shell wall sections and specialized details identified.</li> <li>&gt;Final narrative report of selected building shell system &amp; requirements supporting drawings.</li> <li>&gt;Final Room Data Sheets (RDS) defining physical characteristics &amp; special use environmental requirements</li> <li>&gt;Required arch technical specification sections (presumed to be 75% performance spec &amp; 25% product specification type)</li> <li><b>MEP -</b></li> <li>&gt;Final Equipment List including all OFOI, OFCI &amp; CFCl items, basis of design specifications (for CFCl items, OFOI &amp; OFCI data to be provided by Client).</li> <li><b>Structural -</b></li> <li>&gt;Building structural foundation plan, framing plan.</li> <li>&gt;Final narrative report of selected structural system supporting drawings.</li> <li>&gt;Required structural specification sections (presumed to be 90% performance spec &amp; 10% product specification type)</li> <li><b>Mechanical -</b></li> <li>&gt;Building mechanical plan including primary mechanical system components &amp; equipment (includes duct layouts), air-greased primary mechanical equip. schedule.</li> <li>&gt;Final narrative report of selected mechanical system supporting drawings.</li> <li>&gt;Required mechanical specification sections (presumed to be 50% performance spec &amp; 50% product specification type).</li> <li><b>Electrical -</b></li> <li>&gt;Building electrical power plan including electrical services, load center &amp; service panel locations, electrical system single line diagram, lighting plan, air-greased primary electrical equipment schedule including switchgear, anticipated switchgear, generator, transformer.</li> <li>&gt;Building communication / AV / access control / security plan (based on Client provided information)</li> <li>&gt;Final narrative report of anticipated electrical service &amp; system strategy, including description of primary system components</li> <li>&gt;Final narrative report of anticipated fire / life / access control / security systems (based on Client provided information)</li> <li>&gt;Required electrical specification sections (presumed to be 75% performance spec &amp; 25% product specification type).</li> <li><b>Plumbing -</b></li> <li>&gt;Building plumbing plan including primary plumbing system components &amp; equipment.</li> <li>&gt;Final narrative report of anticipated plumbing service &amp; system strategy, including description of primary system components.</li> <li>&gt;Required plumbing specification sections (presumed to be 90% performance spec &amp; 10% product specification type).</li> <li><b>Risk Protection -</b></li> <li>&gt;Final narrative report of anticipated fire protection service &amp; system strategy, including description of primary system components.</li> <li>&gt;Required fire protection specification sections (presumed to be 100% performance spec &amp; 0% product specification type).</li> </ul>
	<p><b>Qualifications Phase:</b></p> <ul style="list-style-type: none"> <li>&gt;Assist the Client in preparing Request for Qualifications package for Design-Build Services</li> <li>&gt;Coordinate with the Client's legal representatives related to regulatory requirements and their inclusion / integration into the Final Design-Build RFP and RFQ packages.</li> <li>&gt;Attend one pre-RFQ submittal meeting for Interested DB teams</li> <li>&gt;Respond to RFI's during RFQ phase</li> <li>&gt;Assist the Client in reviewing submitted RFQ's, tabulating scoring, and confirming qualifications of submitted SOQ's for compliance with RFQ.</li> </ul> <p><b>Proposal Phase:</b></p> <ul style="list-style-type: none"> <li>&gt;Assist the Client in preparing Request for Proposal packages for shortlisted Design-Build teams.</li> <li>&gt;Coordinate with the Client's legal representatives related to regulatory requirements and their inclusion / integration into the Final Design-Build RFP and RFQ packages.</li> <li>&gt;Attend one pre-RFP submittal meeting for shortlisted DB teams</li> <li>&gt;Respond to RFI's during RFP phase</li> <li>&gt;Participate in interviews / presentations by short-listed DB teams for presentation of final proposals.</li> <li>&gt;Assist the Client in reviewing submitted Proposals, tabulating scoring, review of offered "value add" / alternate / betterment proposal items, supporting RFP scoring committee as required related to clarifying submittals, and assistance with scoring tabulation of RFP submittals rankings, and issue recommendations based on conformance with criteria.</li> </ul>	<p><b>General -</b></p> <ul style="list-style-type: none"> <li>&gt;Final RFQ for Design-Builders package</li> <li>&gt;Addenda related to RFI's received during RFQ process.</li> <li>&gt;Final RFP for Shortlisted Design-Builders package</li> <li>&gt;Addenda related to RFI's received during the RFP process.</li> <li>&gt;Report of Criteria Compliance for submitted Design-Build Proposals.</li> </ul>
DB Procurement		
Bridging Phase	<ul style="list-style-type: none"> <li>&gt;Attend Bridging Kickoff Meeting with DB Team, Client to generally review Project Program and Criteria Documents, project goals, project schedule and milestones, administrative requirements, etc.</li> <li>&gt;Review updated project schedules and budgets as submitted &amp; provide recommendations to Client</li> <li>&gt;Review proposed material / equipment substitutions</li> <li>&gt;Assist the Client with contract negotiations &amp; contract review with DB (presumed to be lead by Client's legal representative).</li> </ul>	<p><b>Handoff to DB Team</b></p> <p>None</p>
Construction Documents	<ul style="list-style-type: none"> <li>&gt;Participate in up to 6 meetings with DB team during final document development to review criteria, review proposed modifications, review DB documents &amp; observe coordination activities of the DB team AOR/EOR.</li> <li>&gt;Respond to DB Team RFI's during development of final documents by DB team.</li> <li>&gt;Review DB Team 50% CD Submittal for compliance with Criteria Documents, including issuing report</li> <li>&gt;Review DB Team 95% CD Submittal for compliance with Criteria Documents, including issuing report</li> </ul>	<ul style="list-style-type: none"> <li>&gt;50% CD Review Report of Design-Builders submittal</li> <li>&gt;95% CD Review Report of Design-Builders submittal</li> </ul>
Bidding	>Assist the Client in procurement of special inspections services	>Final RFP for special inspection services
Construction	<ul style="list-style-type: none"> <li>&gt;Provide Owner Rep Services</li> <li>&gt;Attend weekly OAC meetings on site to review construction progress &amp; general compliance with DB drawings &amp; criteria - includes up to 50 meetings.</li> <li>&gt;Issue weekly field reports</li> <li>&gt;Review limited / select shop drawings for key building components and equipment (TBD).</li> <li>&gt;Review &amp; provide feedback to Client on construction materials testing reports &amp; special inspection reports.</li> <li>&gt;Monitor DB provided schedule for performance &amp; report issues.</li> <li>&gt;Monitor contingency budgets and provide regular feedback &amp; recommendations.</li> <li>&gt;Review monthly DB pay applications.</li> <li>&gt;Report any identified potential change order items or schedule delays.</li> <li>&gt;Review &amp; advise Client on potential scope changes which may be required / requested.</li> <li>&gt;Review &amp; verify change order scope, costs.</li> <li>&gt;Complete punch list on site observation (all disciplines) &amp; provide final punch list. Includes back-punch visit to confirm completion of corrections.</li> <li>&gt;Issue certificate of substantial completion.</li> <li>&gt;Assist in confirming DB required closeout documents &amp; items have been provided.</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Weekly observation reports with photos.</li> <li>&gt;Monthly report on project budget status.</li> <li>&gt;Monthly report on project schedule / construction progress status</li> <li>&gt;Project punch list report.</li> <li>&gt;Certificate of Substantial Completion</li> </ul>

#### Notes:

- Geotechnical services are presumed to be based on the final approved site & sitelayout plan.
- Equipment acronym key - OFOI = Owner Furnished Owner Installed, OFCI = Owner Furnished Contractor Installed, CFCl = Contractor Furnished Contractor Installed.
- Scope presumes that previously completed site survey remains accurate, if site topo, utilities, etc. have been modified since completion of previous survey, updated survey services can be provided as an additional service.
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Project Information	Fire Station
	>\$2M to \$3M construction budget, includes facility equipment, excludes AE fees & similar soft costs. >Include Training Room to fit 50-60 people at tables/chairs (similar to MPD Training Room, size & durability) which may also be used by the public. >Update living quarters for 6 firefighters, with existing Bat. Chief quarters to remain, & possible expansion for 2 additional bunk rooms. >Update and enlarge the current Fitness Room. >Update the current Rest Rooms to be gender neutral configurations. >Expand for one new Apparatus Bay, with consideration to include a saddlebag area for support spaces. >Consider upgrades to the existing Turn-out Gear Room >Facility no longer uses septic field, has sanitary tie into adjacent residential development. >A new generator is on order to replace existing, will be located at SE side of building. >Wood "Barn" can be demolished for expansion. >Equipment to be stored in Apparatus Bays includes 1 Engine, 2 Squads, 1 Reserve Ladder, Battalion Vehicle, Pick-up w/ Boat/Trailer, Gator >

Scope of Services		Deliverables Notes
Programming	<p>&gt;Perform site due diligence / analysis services including contacting gas, electric, water &amp; sanitary providers to confirm availability &amp; requirements for anticipated service modifications to the facility.</p> <p>&gt;Attend kick-off meeting with key FD stakeholders to review project goals, budget, schedule, requirements &amp; program.</p> <p>&gt;Distribute FD facility questionnaire to key stakeholders.</p> <p>&gt;Collect, analyze questionnaires &amp; develop preliminary project program.</p> <p>&gt;Meet with Client to review program questions, review room diagrams, review site elements / diagrams for program spaces &amp; areas.</p> <p>&gt;Revise preliminary program &amp; issue final project program including room diagrams.</p> <p>&gt;Building and zoning code due diligence review and analysis, including meeting with governing department(s) to review any identified potential code concerns / limitations.</p> <p>&gt;Complete general facility system review (A/S/C/MEP) to identify any existing systems / components which may require replacement / repairs due to age / condition.</p> <p>&gt;Develop a preliminary project budget including hard and soft costs to be used for comparative analysis during design phases.</p> <p>&gt;Develop a preliminary project schedule including key milestones &amp; critical path items including anticipated construction phase activities.</p> <p>&gt;Identify critical project criteria items (materials, systems, equipment) required to be detailed in the final criteria documents.</p>	<p><b>Criteria AE Team Leading</b></p> <p><b>General -</b></p> <p>&gt;Fire Station facility questionnaire</p> <p>&gt;Meeting minutes from scheduled project meetings.</p> <p>&gt;Project Budget Format Report &amp; Initial budget breakdown</p> <p>&gt;Initial General Project Schedule including primary project phases.</p> <p><b>Site / Civil -</b></p> <p>&gt;Report confirming capacity of utilities to building confirming ability of existing services to meet increased demands.</p> <p>&gt;Zoning Summary Report.</p> <p>&gt;Narrative summary of zoning required landscaping improvements.</p> <p><b>Architectural -</b></p> <p>&gt;Final Project Program</p> <p>&gt;Room Diagrams for Program Spaces</p> <p>&gt;Preliminary Room Data Sheets (Primary Spaces only this Phase)</p> <p><b>FF&amp;E -</b></p> <p>&gt;Preliminary Equipment List of anticipated Owner Furnished Items.</p> <p><b>Structural -</b></p> <p>&gt;Draft RFP for geotechnical services.</p> <p><b>Mechanical - None</b></p> <p><b>Electrical - None</b></p> <p><b>Plumbing - None</b></p> <p><b>Fire Protection - None</b></p>
Schematic Design	<p>&gt;Propose schematic design solutions and identify design strategy / options for the site layout.</p> <p>&gt;Propose schematic design solutions and identify design strategy for the building shell / envelope (to match existing facility construction).</p> <p>&gt;Propose schematic design solutions and identify design strategy / options for the building layout.</p> <p>&gt;Propose schematic design solutions and identify design strategy / options for the building structural systems (to match existing facility construction).</p> <p>&gt;Propose schematic design solutions and identify design strategy / options for the building MEP systems (to match existing facility systems).</p> <p>&gt;Develop project equipment list including (CFOI, OFCI &amp; CFCI items) for new equipment.</p> <p>&gt;Prepare and issue a Preliminary Schematic Design Package including architectural, structural, civil, and MEP documents at 75% complete of the Schematic Design Phase to allow review and approval by the Client. Subsequently make revisions based on review comments received. Includes meeting to review Client comments.</p> <p>&gt;Preparation of project specification list of contents for anticipated project materials, components, systems.</p> <p>&gt;Issue a Final Schematic Design Package including architectural, structural, civil, and MEP documents for submittal to, and approval by the Client.</p> <p>&gt;Based on Final Schematic Design Package prepare an Opinion of Anticipated Construction Cost.</p> <p>&gt;Participate in regular design meetings (anticipated to be three (3) this phase to review regular design progress, identified issues, and general coordination with the Client</p>	<p><b>General -</b></p> <p>&gt;75% Schematic Design Review Submittal (per timing info noted below)</p> <p>&gt;75% Schematic Design Review Submittal (per timing info noted below)</p> <p>&gt;Meeting minutes from scheduled project meetings.</p> <p>&gt;Updated Project Budget</p> <p>&gt;Updated Project Schedule.</p> <p><b>Site / Civil -</b></p> <p>&gt;Preliminary site design options / studies (if/ not plan).</p> <p>&gt;Narrative report of preliminary civil design requirements.</p> <p>&gt;Identification of required civil specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</p> <p><b>Architectural -</b></p> <p>&gt;Preliminary building floor plan options / studies.</p> <p>&gt;Preliminary exterior elevation options / studies.</p> <p>&gt;Preliminary building shell wall sections / studies.</p> <p>&gt;Narrative report of selected building shell system (presumed to match existing facility)</p> <p>&gt;Further Developed Room Data Sheets (RDS Tables) defining anticipated physical characteristics / finishes &amp; specialized environmental requirements.</p> <p>&gt;Identification of required architectural specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</p> <p><b>FF&amp;E -</b></p> <p>&gt;Preliminary Equipment List including (CFOI, OFCI &amp; CFCI items).</p> <p><b>Structural -</b></p> <p>&gt;Preliminary building structural foundation &amp; framing plans, details. (Presumed to match existing facility)</p> <p>&gt;Narrative report of selected structural system.</p> <p>&gt;Identification of required structural specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</p> <p><b>Mechanical -</b></p> <p>&gt;Representation of optional mechanical systems.</p> <p>&gt;Narrative report of selected mechanical system.</p> <p>&gt;Identification of required mechanical specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</p> <p><b>Electrical -</b></p> <p>&gt;Narrative report of anticipated electric service &amp; system upgrades.</p> <p>&gt;Identification of required electrical specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</p> <p><b>Plumbing -</b></p> <p>&gt;Narrative report of anticipated plumbing service &amp; system upgrades.</p> <p>&gt;Identification of required plumbing specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</p> <p><b>Fire Protection -</b></p> <p>&gt;Narrative report of anticipated fire protection service &amp; system upgrades.</p> <p>&gt;Identification of required fire protection specification sections (table of contents &amp; confirmation of performance spec vs. product specification required).</p>

Design Development [Start]	<p>&gt;Continue design development to approved schematic design solution for the site layout.</p> <p>&gt;Continue design development of approved schematic design solution for the building shell / envelope systems.</p> <p>&gt;Continue design development of approved schematic design solutions for the selected building plan layout.</p> <p>&gt;Continue design development of approved schematic design solutions for the selected building structural systems.</p> <p>&gt;Continue design development of approved schematic design solutions for the selected building MEP systems.</p> <p>&gt;Finalize a project equipment list including (OFOI, OFCI &amp; CFCI Items) for new equipment.</p> <p>&gt;Prepare and issue a Preliminary Design Development Package including architectural, structural, civil, and MEP documents at 75% complete of the Design Development Phase to allow review and approval by the Client. Subsequently make revisions based on review comments received. Includes meeting to review Client comments.</p> <p>&gt;Preparation of project criteria specifications for anticipated project materials, components, systems.</p> <p>&gt;Issue a Final Design Development Package including architectural, structural, civil, and MEP documents for submittal to, and approval by the Client. [To be used as the Criteria Documents]</p> <p>&gt;Based on Final Design Development Package update the Schematic Design Opinion of Anticipated Construction Cost.</p> <p>&gt;Participate in regular design meetings (anticipated to be three (3) this phase to review regular design progress, identified issues, and general coordination with the Client</p>	<p><b>General</b> -</p> <ul style="list-style-type: none"> <li>&gt;75% Design Development Review Submittal (containing performance addenda)</li> <li>&gt;100% Design Development Review Submittal (containing performance addenda)</li> <li>&gt;Meeting minutes from scheduled project meetings.</li> <li>&gt;Updated Project Budget</li> <li>&gt;Updated Project Schedule</li> <li>&gt;Final RFP for geotechnical services.</li> </ul> <p><b>Site / Civil</b> -</p> <ul style="list-style-type: none"> <li>&gt;Final design including layout plan, utility plan (if required), conceptual topsoil plan.</li> <li>&gt;Narrative report of final civil design requirements supporting drawings.</li> <li>&gt;Required civil specification sections (presumed to be 95% performance spec &amp; 5% product specification type).</li> </ul> <p><b>Architectural</b> -</p> <ul style="list-style-type: none"> <li>&gt;Separation area floor plan, equipment layout plan, reflected ceiling plan.</li> <li>&gt;Interior elevations.</li> <li>&gt;Building shell wall sections and special details identified.</li> <li>&gt;Final narrative report of selected building shell system &amp; requirements supporting drawings.</li> <li>&gt;Final Room Data Sheets (RDS) (Space defining physical characteristics / finishes &amp; special needs / environmental requirements)</li> <li>&gt;Required architectural specification sections (presumed to be 75% performance spec &amp; 25% product specification type).</li> </ul> <p><b>MEP</b> -</p> <ul style="list-style-type: none"> <li>&gt;Final Equipment List including (OFOI, OFCI &amp; CFCI Items), basis of design specifications (for CFCI Items, OFCI &amp; OFOI data to be provided by Client).</li> </ul> <p><b>Structural</b> -</p> <ul style="list-style-type: none"> <li>&gt;Separation area structural foundation plan, framing plan.</li> <li>&gt;Final narrative report of selected structural system supporting drawings.</li> <li>&gt;Required structural specification sections (presumed to be 95% performance spec &amp; 5% product specification type).</li> </ul> <p><b>Mechanical</b> -</p> <ul style="list-style-type: none"> <li>&gt;Separation area mechanical plan indicating new primary mechanical system components &amp; equipment (includes duct layouts), engineered primary mechanical equipment schedule for primary system components requiring modification.</li> <li>&gt;Required mechanical specification sections (presumed to be 50% performance spec &amp; 50% product specification type).</li> </ul> <p><b>Electrical</b> -</p> <ul style="list-style-type: none"> <li>&gt;Separation area electrical plan indicating modifications to electrical service, electrical system single line diagram, lighting plan, engineered primary electrical equipment schedule for primary system components requiring modification.</li> <li>&gt;Final narrative report of anticipated electrical service &amp; system strategy, including description of new primary system components.</li> <li>&gt;Final narrative report of anticipated electrical service &amp; system strategy (based on Client provided information).</li> <li>&gt;Required electrical specification sections (presumed to be 75% performance spec &amp; 25% product specification type).</li> </ul> <p><b>Plumbing</b> -</p> <ul style="list-style-type: none"> <li>&gt;Separation area plumbing plan indicating new primary plumbing system components &amp; equipment.</li> <li>&gt;Final narrative report of anticipated plumbing service &amp; system strategy, including description of primary system components.</li> <li>&gt;Required plumbing specification sections (presumed to be 90% performance spec &amp; 10% product specification type).</li> </ul> <p><b>Risk Mitigation</b> -</p> <ul style="list-style-type: none"> <li>&gt;Final narrative report of anticipated fire protection service &amp; system strategy.</li> <li>&gt;Required fire protection specification sections (presumed to be 100% performance spec &amp; 0% product specification type).</li> </ul>
DB Procurement	<p><b>Qualifications Phase:</b></p> <ul style="list-style-type: none"> <li>&gt;Assist the Client in preparing Request for Qualifications package for Design-Build Services</li> <li>&gt;Attend one pre-RFQ submittal meeting for interested DB teams</li> <li>&gt;Respond to RFI's during RFQ phase</li> <li>&gt;Assist the Client in reviewing submitted RFQ's, tabulating scoring, and confirming qualifications of submitted SOQ's for compliance with RFQ.</li> </ul> <p><b>Proposal Phase:</b></p> <ul style="list-style-type: none"> <li>&gt;Assist the Client in preparing Request for Proposal packages for shortlisted Design-Build teams.</li> <li>&gt;Respond to RFI's during RFP phase</li> <li>&gt;Participate in interviews / presentations by short-listed DB teams for presentation of final proposals.</li> <li>&gt;Assist the Client in reviewing submitted Proposals, tabulating scoring, review of offer "value add" / alternate / betterment proposal items, supporting RFP scoring committee as required related to clarifying submittals, and assistance with scoring tabulation of RFP submittals rankings, and issue recommendations based on conformance with criteria.</li> </ul>	<p><b>General</b> -</p> <ul style="list-style-type: none"> <li>&gt;Final RFQ for Design-Builders package</li> <li>&gt;Addenda related to RFI's received during RFQ process.</li> <li>&gt;Final RFP for Shortlisted Design-Builders package</li> <li>&gt;Addenda related to RFI's received during the RFP process.</li> <li>&gt;Report of Criteria Compliance for submitted Design-Build Proposals.</li> </ul>
Bridging Phase	<ul style="list-style-type: none"> <li>&gt;Attend Bridging Kickoff Meeting with DB Team, Client to generally review Project Program and Criteria Documents, project goals, project schedule and milestones, administrative requirements, etc.</li> <li>&gt;Review updated project schedules and budgets as submitted &amp; provide recommendations to Client</li> <li>&gt;Review proposed material / equipment substitutions</li> <li>&gt;Assist the Client with contract negotiations &amp; contract review with DB (presumed to be lead by Client's legal representative).</li> </ul>	<p><b>Handoff to DB Team</b></p> <p>None</p>
Construction Documents	<ul style="list-style-type: none"> <li>&gt;Participate in up to 2 meetings with DB team during final document development to review criteria, review proposed modifications, review DB documents &amp; observe coordination activities of the DB team AOR/EOR.</li> <li>&gt;Respond to DB Team RFI's during development of final documents by DB team.</li> <li>&gt;Review DB Team 50% CD Submittal for compliance with Criteria Documents, including issuing report</li> <li>&gt;Review DB Team 95% CD Submittal for compliance with Criteria Documents, including issuing report</li> </ul>	<ul style="list-style-type: none"> <li>&gt;50% CD Review Report of Design-Builders submittal</li> <li>&gt;95% CD Review Report of Design-Builders submittal</li> </ul>
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Construction	<ul style="list-style-type: none"> <li>&gt;Provide Owner Rep Services</li> <li>&gt;Attend weekly OAC meetings on site to review construction progress &amp; general compliance with DB drawings &amp; criteria - includes up to 36 meetings.</li> <li>&gt;Issue weekly field reports</li> <li>&gt;Review limited / select shop drawings for key building components and equipment (TBD).</li> <li>&gt;Review &amp; provide feedback to Client on construction materials testing reports &amp; special inspection reports.</li> <li>&gt;Monitor DB provided schedule for performance &amp; report issues.</li> <li>&gt;Monitor contingency budgets and provide regular feedback &amp; recommendations.</li> <li>&gt;Review monthly DB pay applications.</li> <li>&gt;Report any identified potential change order items or schedule delays.</li> <li>&gt;Review &amp; advise Client on potential scope changes which may be required / requested.</li> <li>&gt;Review &amp; verify change order scope, costs.</li> <li>&gt;Complete punch list on site observation (all disciplines) &amp; provide final punch list. Includes back-punch visit to confirm completion of corrections.</li> <li>&gt;Issue certificate of substantial completion.</li> <li>&gt;Assist in confirming DB required closeout documents &amp; items have been provided.</li> </ul>	<ul style="list-style-type: none"> <li>&gt;Weekly observation reports with photos.</li> <li>&gt;Monthly report on project budget status.</li> <li>&gt;Monthly report on project schedule / construction progress status</li> <li>&gt;Project punch list report.</li> <li>&gt;Certificate of Substantial Completion</li> </ul>

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