



**GOVERNING BOARD AGENDA ITEM
AMPHITHEATER UNIFIED SCHOOL DISTRICT NO. 10**

DATE OF MEETING: August 23, 2011

TITLE: Approval of Bond-Related Projects

- 1) Award of Contract for Architectural Services for Facility Improvements Amphitheater Middle School Based Upon Responses to Request for Qualifications (RFQ) 10-0072**
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BACKGROUND:

A Notice of Request for Qualifications (RFQ) for Professional Architectural Services was advertised in the Legal Section of *The Daily Territorial* pursuant to the requirements of Arizona Administrative Code R7-2-1117. This RFQ (10-0072) asked for statements of qualifications from interested architectural firms to provide professional architectural services for design, drawings, specifications, code & ADA compliance review, budget and scheduling for facility improvements at Amphitheater Middle School as identified in the May 2007 Blue Ribbon Budget Analysis and Facilities Needs Committee Report.

The scope of work included renovating the kitchen & cafeteria, providing ADA compliant restrooms, expanding the nursing facility, refurbishing the gymnasium & locker rooms and constructing new classrooms to replace aging portable buildings. Seventeen vendors responded. The evaluation team ranked each vendor based on the evaluation criteria listed in the request for qualifications.

RECOMMENDATION:

The Administration recommends the Governing Board make the determination that the vendor's compensation for the services provided is both fair and reasonable and award a contract to Burns Wald-Hopkins Shambach Architects based on their response to RFQ 10-0072.

INITIATED BY:

A handwritten signature in black ink that reads "Scott Little".

Scott Little, Chief Financial Officer

Date: August 13, 2011

Vicki Balentine, Ph.D., Superintendent

Evaluation Phase #1:

The evaluation team, Chris Louth, Bond Projects Manager, Brian Nottingham, Assistant Bond Projects Manager and Tassi Call, Principal Amphitheater Middle School & Prince Elementary School reviewed each vendor's response. The evaluation criteria in order of importance were:

1. Professional background & caliber of previous experience of each professional person with a focus on the design and renovation of existing K-12 properties to include kitchen renovations and ADA compliant restrooms.
2. The firm's demonstrated record of performance, design and renovation of K-12 properties on occupied campuses.
3. Control of costs, ability to meet schedules, quality of work, etc. The District reserves the right to conduct independent vendor evaluations based on site visits, reference checks and user acceptance.
4. Creativity of the firm in their design solutions.
5. Other criteria, excluding cost, desired by the District to include responsiveness of the vendor in meeting the requirements of the RFQ.

The seventeen responding vendors evaluated were Merry Carnell Schlecht, NTD Architecture, Breckenridge Group, Line & Space, Seaver Franks, EMC2, ABA Architects, Orcutt Winslow, Swaim, Randel Jacob, The Architecture Company, Burns Wald-Hopkins Shambach, WLFA Associates, CDG Architects, DLR Group, Corgan and Earl Kai Chann.

EMC2, Swaim and Burns Wald-Hopkins Shambach were the three highest ranked vendors. Each vendor was provided a meeting agenda with discussion points covering different aspect of the scope of work at Amphitheater Middle School.

Evaluation Phase #2, Discussion Points:

1) The work at Amphitheater Middle School, major new construction and site renovation requires considerable forthought to provide a superior learning environment while integrating the new construction into a dated campus creating a space where people want to come. Walk us through a project your firm recently completed with similar challenges. Describe the project. What were the challenges? How were they addressed? What were the major accomplishments?

2) A significant part of the budget for Amphitheater Middle School is designated for the auditorium and locker room renovation. Walk us through another project completed by your firm, a middle school gymnasium renovation to include locker rooms. Tell us about the floor covering, lighting, locker room fixtures, etc. What made the project special?

3) Communication; define communications role if your firm is selected as the successful architect for the Amphitheater Middle School Project.

4) Evaluation Team Questions

The Evaluation Team ranked each vendor based on their response to the four agenda items listed. Based on their presentation Burns Wald-Hopkins Shambach was rated first followed by Swaim and

then EMC2. The Evaluation Team acknowledged any one of these three firms could provide architectural services which would more than meet the scope of work requirements. Burns Wald-Hopkins Shambach spoke of incorporating exterior space when renovating the cafeteria. The use of outdoor seating, walkways, amphitheaters, building placement, awnings, landscaping, circulation, etc. to build a campus with a synergy of purpose was the focal point of their presentation. They addressed early phasing, planning for safety & staging, acoustical treatments for the gymnasium, drainage issues, shower treatment for the locker rooms, table storage in the cafeteria, etc.. For the work required at Amphitheater Middle School the Evaluation Team voted Burns Wald-Hopkins Shambach as the highest ranked vendor.

Evaluation Point #3:

The Arizona Administrative Code Title 7 Chapter 2 governs the procurement process for specified professional services which includes architects. R7-2-1122 defines the final evaluation criteria, fee negotiation, in the selection of a professional service provider. The Code requires the fee charged to be both fair and reasonable to the school district taking into account the estimated value, scope, complexity and nature of the required services. R7-2-1079 requires an analysis of the fee proposed to determine if the fee is reasonable and fair.

Burns Wald-Hopkins Shambach provided the evaluation team with a State of Arizona School Facilities Board Architectural fee schedule adopted January 7, 1999 and modified September 2, 1999 covering four categories (groups) of school construction and the associated architectural fees.

Burns Wald-Hopkins Shambach fee will be a percentage of the guaranteed maximum price using the Arizona School Facilities Board (SFB) architectural fee schedule referenced above. Group D covers projects, repairs and renovations, alterations to facilities, code corrective work or upgrades, systems replacements, etc. The fee range, Group D, for a projected cost of less than \$10,000,000 is 6.8% to 7.2%. Please see Attachment A, Architectural Fee Guidelines. The fee proposed by Burns Wald-Hopkins Shambach Architects is 7.2% which will cover the Program System Elements as designated in the Amphitheater USD Facilities Assessment to include new classrooms, gymnasium & locker room renovation, remodeled cafeteria & kitchen, ADA restroom upgrades and an expanded nursing facility.

Services not included in the basic fee are listed in Attachment B.

Chris Louth, Bond Projects Manager has reviewed the fee schedule provided by Burns Wald-Hopkins Shambach Architects and has determined it to be fair and reasonable. A notarized Burns Wald-Hopkins Shambach Architects (certified) fee schedule signed by an officer of the company is on file in the Purchasing Department.

'Attachment A'

SCHOOL FACILITIES BOARD

Adopted: January 7, 1999

Modified: September 2, 1999
Certified Correct: November 13, 2000

ARCHITECTURAL FEE GUIDELINES

These guidelines are to be used to determine the Lump Sum Architectural & Engineering (A&E) fees for "Basic Services" for all SFB projects, including both New Construction and Deficiency Correction projects. **** These are guidelines, not a schedule ****.

The A&E fee for an individual project should be determined by both the difficulty and the estimated cost of the project. In New Construction projects, the fee should be determined by the square foot times the formula cost of the planned facility or project (Construction Cost) multiplied by a factor determined by the size and complexity of the scope of the project. See below both "Project Types" (to determine the difficulty of the project) and the "Fee Guidelines Multiplier" (for the percentage multiplier) to determine the project's fee.

Basic Services: The architectural contract should identify and include all of the services necessary to design and construct the project under "Basic Services" without any hidden or unknown cost. The services to be included as part of the contract as "Basic Services" shall consist of architectural, structural, mechanical, electrical, civil, and landscape design. The descriptions of these services are described in the American Institute of Architect (A.I.A). Document B141, "Standard Form of Agreement Between Owner and Architect (1987 Edition)", Article 2, and Add, Modified and/or Delete paragraphs 2.6.5, 2.6.5.1, 2.6.15.1, 3.2, 3.2.1, 3.2.2, 3.2.3, 3.3.1.2, 3.3.1.3, 3.3.3, 3.3.4, 3.3.6, 3.3.9, 3.4.1, 3.4.4, 3.4.9, 4.6.1, 4.6.1.1, 5.2.2, 5.2.3, 8.6, 8.7.1, 8.7.2, 8.7.3, 10.2.1.1, 10.2.1.2, 10.2.1.4, 10.2.1.6

(Please REFER TO the SFB provided ENCLOSED SAMPLE DOCUMENT).

Lump Sum Fee: This is a fixed A&E fee that is based on a percentage of the estimated cost of construction for the approved project specified for a defined scope of work.

Construction Cost: The cost of construction includes the cost of the construction of the building, site improvements, and all fixed and installed equipment. It does not include Furniture, Fixtures & Equipment (FF&E), testing, surveys, permits, land cost, studies, contingencies, or A&E fees.

PROJECT TYPES:

Group A - MORE THAN AVERAGE COMPLEXITY PROJECTS: New complex stand-alone facilities such as special purpose classrooms, laboratory classrooms, libraries, auditoriums, and food service facilities.

Group B - AVERAGE COMPLEXITY PROJECTS: Total facilities such as new elementary schools, middle schools, high schools, or large additions to existing facilities.

Group C - LESS THAN AVERAGE COMPLEXITY PROJECTS: New less complex stand-alone facilities such as warehouses, maintenance facilities, bus barns, offices, and storage facilities or any repetitive design use of a facility.

Group D - REPAIRS AND RENOVATIONS: Miscellaneous repairs and renovations, alterations to facilities, code corrective work or upgrades, system replacements, etc.

ARCHITECTURAL FEE GUIDELINES

Page 2

Fee Guideline Multiplier:

Construction Cost:	Group A	Group B	Group C	Group D
\$ 0 to \$ 100,000	8.8%	7.9%	7.2%	8.9%
\$ 100,000 to \$ 400,000	7.8% - 8.8%	7.2% - 7.9%	6.6% - 7.2%	8.3% - 8.9%
\$ 400,000 to \$ 1,000,000	7.2% - 7.8%	6.7% - 7.2%	6.2% - 6.6%	7.8% - 8.3%
\$ 1,000,000 to \$ 4,000,000	6.3% - 7.2%	6.0% - 6.7%	5.7% - 6.2%	7.2% - 7.8%
\$ 4,000,000 to \$10,000,000	6.0% - 6.3%	5.5% - 6.0%	5.3% - 5.7%	6.8% - 7.2%
\$10,000,000 to \$20,000,000	5.5% - 6.0%	5.5% - 6.0%	5.0% - 5.3%	5.7% - 6.8%
\$20,000,000 and above	5.5% - 6.0%	5.5% - 6.0%	4.3% 5.0%	to Up to 6.0%

FEE FORMULA:

Estimated Construction Cost _____ x Multiplier _____ % = Fee

Notes:

The higher the Construction Cost in each range, the multiplier percentage should be proportionally lower.

Districts in remote areas and/or with high cost per square foot should not use a higher multiplier percentage than normal. The increased cost per square foot difference automatically increases the fee to cover the additional cost of travel. Since most of the architects' offices and their consultants are in urban areas, the cost to design and produce the contract documents would be the same as if the project were in the same city. See example below for a 750 student elementary school.

<p>City:</p> <p>750 x 95 S.F/ student. = 71,250 S.F.</p> <p>71,250 S.F. x \$85 / S.F. = \$6,056,250</p> <p>\$6,056,250 x 5.7% = \$345,206 = Fee</p>	<p>Rural:</p> <p>750 x 95 S.F/ student. = 71,250 S.F.</p> <p>71,250 S.F. x \$125 / S.F. = \$8,906,250</p> <p>\$8,906,250 x 5.6% = \$498,750 = Fee</p>
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'Attachment B'

July 25, 2011

Pete Burgard, Purchasing Manager
Amphitheater Public Schools
1001 W. Roger Road
Tucson, AZ 85705

RE: Amphitheater Middle School Architectural Services RFQ #10-0072

Dear Pete,

BWS Architects is pleased to submit this fee proposal for architectural services for the above noted project.

Scope:

We understand the proposed scope of this project to be new construction and site renovations at Amphitheater Middle School, 315 Prince Road as described in the RFQ and as follows:

- (6) New classrooms
- Renovate auditorium, gym, and locker rooms
- Remove accordion classroom walls and replace with framed walls
- Expand nurse office / remodel administration building
- Remodel cafeteria and kitchen
- Modernize / update restrooms to include ADA considerations
- Campus security fencing
- Campus technology re-cabling

The actual scope will be determined or confirmed in the programming phase and during site investigation phase. We also understand this will be a phased construction project due to the need to maintain the operation of the existing campus during construction. As such the construction period may be extended beyond what is typical for a project of this magnitude.

We understand the construction budget for the project has been established as \$5.5 million.

Services:

Basic services will consist of architectural, structural, mechanical, plumbing and electrical design and engineering for all phases of document preparation and construction as defined by the Amphitheater Unified School district No. 10 Owner – Architect Agreement Paragraph 5, as distributed with the RFQ.

Our fee includes regular meetings during the design, document prep at your office or the project site and weekly meetings during the construction administration phase at the site.
08/12/11 10:08 AM 2

Fee:

Our fee for the work outlined above will be a percentage of the guaranteed maximum price using the Arizona School Facility Boards Architectural Fee Guidelines (see attachment). BWS Architects is agreeable to working on fixed lump sum fee when the budget and scope are correctly identified at the beginning of the project.

Sample Fee for Amphitheater Middle School:

\$5,500,000 X 0.072 (Group D) = \$396,000

Food Service \$7,150

Campus Technology Re-cabling \$27,500

Total \$430,650

08/17/11 10:32 AM

Additional Services:

Our basic services do not include the following which, if required, will be considered additional services:

- 1. Offsite civil design or engineering*
- 2. Preparation of easements, dedications, or civil reports.*
- 3. Storm Water Pollution Prevention Plans*
- 4. Special System design and engineering Raceway and device locations will be provided in basic services*
- 5. Design services caused by scope changes or extensive value engineering changes after the completion of documents*
- 6. Preparation of code variances*
- 7. Preparation of Record Drawings*

Additional Services will be proposed on a per task basis and submitted for approval prior to performing the services. Where applicable they will be performed on an hourly basis at our standard 2011 billing rate per the attached rate sheet.

Reimbursable Costs:

Our basic services do not include the following services which typically are the responsibility of the Owner to provide or procure. These services, if provided through BWS Architects will be considered reimbursable at cost plus 10%:

- 1. Printing and reproduction of Owner review sets, bid sets, presentation and submittal sets.*
- 2. Plan review or permit fees*
- 3. Special Inspections*
- 4. Materials Testing*
- 5. Geotechnical Report*
- 6. Environmental Reports*
- 7. Topographical and ALTA Surveys*

All work will be billed monthly based on the percentage of completion. We will begin work immediately upon receipt of a purchase order or a signed contract.

BWS Architects carries \$2,000,000 E&O Insurance Policy. A Certificate of Insurance will be forwarded showing standard coverage.

We look forward to working with you on this important project. Please feel free to call if there are any comments or concerns regarding our proposal. I would be happy to discuss this proposal further.

Sincerely,

BWS Architects
Robin Shambach AIA
Principal/Project Manager