



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

DATE OF MEETING: November 13, 2012

TITLE: Approval of Bond-Related Projects

- 1) Award of Contract for Architectural Services for Cross Middle School and Harelson Elementary School Based on Responses to Request for Qualifications 12-0017**
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BACKGROUND:

Request for Qualifications (RFQ) 12-0017 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 Cross Middle School and Harelson Elementary School as identified in the May 2007 Blue Ribbon Budget Analysis and Facilities Needs Committee Report. The scope of work included construction of new classrooms to replace aging portable buildings, restroom renovation to meet ADA compliance, improved site drainage, campus security fencing, etc.

Nine vendors responded. The evaluation team ranked each vendor based on the evaluation criteria listed in the request for qualifications. The three highest-ranked vendors were scheduled to meet with the evaluation team for discussions. The top-ranked vendor, after discussions, was asked to provide certified cost and pricing data for the proposed work.

RECOMMENDATION:

The Administration recommends that the Governing Board make the determination that the vendor's compensation for the services provided is fair and reasonable and Award a Contract to Swaim Associates LTD Architects based on their response to Request for Qualifications 12-0017.

INITIATED BY:

Scott Little, Chief Financial Officer

Date: November 5, 2012

Patrick Nelson, Superintendent

Evaluation Phase #1:

The evaluation team, Chris Louth, Bond Projects Manager, Shannon Chandler, Principal Cross Middle School, Andy Heinemann, Principal Harelson Elementary School, Pat Sledge, Director Facility Support Services & AJ Malis, Instructional Support Assistant 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 facilities to include new construction, ADA compliant restrooms, IT upgrades and site drainage.
2. The firm's demonstrated record of performance, design and renovation of K-12 facilities on occupied campuses utilizing a Construction Manager at Risk construction procurement.
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 nine vendors evaluated were Scott Rumel, Breckenridge Group, Earl Kai Chann, L2 Architecture, EMC2, Swaim Associates, Burns Wald-Hopkins Shambach, Krebs Carhuff, and Sakellar Associates.

The three highest ranked vendors selected for discussions were Breckenridge Group, Swaim Associates and Burns Wald-Hopkins Shambach. Each vendor was provided a meeting agenda with discussion points covering different aspects of the scope of work at Cross Middle School and Harelson Elementary School.

Evaluation Phase #2, Meeting Agenda Discussion Points:

1) The Cross Middle School campus has extensive drainage crossing the campus exiting onto and across Chapala Drive to the South. The Blue Ribbon Budget Analysis & Facility Needs Committee has identified site drainage at Cross Middle School as a potential standing water health hazard. As build outs of neighborhoods and commercial property occur, drainage issues often arise. Remediation after the fact is then required. Tell the Committee of your recent experience working to correct just such a problem. Briefly explain the cause, the remediation done and how the work required impacted and /or benefited the property.

2) The Blue Ribbon Committee also identified Technology Infrastructure required to support the Teaching of 21st Century Skills. Current cabling, optics and other infrastructure components are insufficient to meet this need. Both Cross Middle School and Harelson Elementary School are scheduled for complete re-cabling with Cat Six Cable. The Committee would like know the presenters experience providing technology upgrades to older construction, the challenges met & addressed and the lessons learned.

3) The work required at Cross/Harelson, ADA compliant restrooms, covered walkways, new classrooms and security fencing all must be designed for ease of maintenance and longevity.

Sustainability is a word used by Facility Support Services personnel to define the above. Their expectations are products with:

- ✓ low maintenance such as anodized walkway coverings that require no painting
- ✓ minimizing or eliminating roof mounted equipment/roof penetrations
- ✓ equipment accessibility for servicing
- ✓ equipment with proven life expectancies and serviceable
- ✓ low maintenance landscaping
- ✓ minimizing irrigation or drainage next to buildings
- ✓ sustainable design that addresses all phases of facility life cycle
- ✓ equipment and design that minimizes usage of resources such as energy and water
- ✓ building layouts to maximize access control
- ✓ renewable energy usage and natural lighting

Provide for the Committee how your design will achieve sustainability for each of the following:

New classrooms

Covered walkways

ADA compliant restrooms

Security fencing

4) Sound attenuation in the MPR is major concern for a quality environment. Provide the Committee with three examples of your firm's work taking a large, highly used space and improving the quality of the space to allow for, (for example) a musical review, a theatrical production, meal service and indoor gym classes.

Evaluation Team: Questions 15 Minutes

The evaluation team ranked each vendor based on their response to the discussion points. Swaim Associates was rated first followed by Burns Wald-Hopkins Shambach and Breckenridge Group.

Swaim Associates demonstrated recent K-12 experience, new classroom & ADA restroom construction, site drainage remediation, installation of IT cabling and work completed on occupied campuses utilizing a Construction Manager at-Risk construction delivery method. Two Swaim consultants spoke to the Evaluation Committee.

Ryan Stucci of EEC, a Civil Engineer, provided examples of his work with Swaim to resolve drainage problems. Work on K-12 occupied campuses. Mr. Stucci spoke of his professional relationships with local municipal jurisdictions and the cooperation he has received from them in solving complex drainage issues on school sites.

Vicki Benavidez of GLHN, presented her experience designing IT distribution networks on eleven different K-12 campuses. Ms. Benavidez's review of school IT distribution networks provided detailed information on IT networks and their design. The evaluators appreciated the lessons learned on her previous projects and how they allow for continuous improvement in IT design development.

Mark Bollard and Mike Culbert from Swaim spoke of their previous experience providing sustainable materials in the design of easily supervised cost effective new classrooms and ADA compliant restrooms. Sound Attenuation in multi-use campus facilities, multi-purpose rooms was

reviewed. Swaim utilizes the services of Mark Macelli, a nationally recognized sound technician who worked with the District on the Canyon del Oro Performing Arts Theater. In closing they reviewed their firm's current work load and their ability to timely complete the required design work at Cross Middle School and Harelson Elementary School.

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.

Swaim Associates 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, ('Attachment A').

The Swaim Associates fee will be a percentage of the guaranteed maximum price using the Arizona School Facilities Board (SFB) Architectural Fee Guidelines referenced above. The Swaim fee schedule is based on Group A, (More Than Average Complexity Projects) to include libraries, special purpose classrooms, etc. and Group D, (Repairs And Renovations) covering system upgrades, alterations, (restroom renovations), etc. Please see 'Attachment B' the Swaim fee proposal for Cross Middle School and Harelson Elementary School.

Chris Louth, Amphitheater Bond Projects Department Manager, has reviewed the fee schedule provided by Swaim Associates and has determined it to be fair and reasonable. A notarized Swaim Associates (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

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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% to 5.0%	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.

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

October 30, 2012

Pete Burgard
Purchasing Manager
Amphitheater Unified School District No. 10
1001 W. Roger Road
Tucson, Arizona 85705

Re: RFQ 12-0017 Cross Middle School

Dear Pete,

We are pleased to submit the following fee proposal for architectural services for the referenced project. Our fee will be a percentage of the guaranteed maximum price using the School Facility Boards Architectural Fee Guidelines. When the scope of work falls under multiple fee groups, the rate will be prorated based on the work falling under each category. The School Facilities Board criteria are listed below.

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.

FEE 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% to 5.0%	Up to 6.0%

1. Project Scope:

We understand that the proposed scope of this project to be a combination of new classroom additions and renovation improvements to Cross Middle School as outlined in the RFQ.

- a. Cross Middle School
 - 4 Classroom Addition
 - Modernize and Add ADA Restrooms
 - Technology: Re-cable Campus
 - Replace Covered Walkways and Campus Security Fencing

The actual scope will be determined and confirmed in the programming and site investigation phase.

Based on recent past experience we estimate the required Construction Budget for classroom additions will be approximately \$200 to \$230/SF depending on available infrastructure and site improvements.

2. Basic Services:

- a. Basic Services include architectural, structural, mechanical, plumbing, electrical, on-site civil, and landscape architecture as defined in the Owner-Architect Agreement.

This fee includes weekly meetings during design, construction document development, and construction administration at the project sites.

3. Fee:

Our fee for the outlined work will be a percentage of the guaranteed maximum price using the School Facilities Board Architectural Fee Guidelines included previously in this letter. If desired Swaim Associates is agreeable to working on a fixed lump sum fee when the budget and scope are identified.

- a. Sample Fee for Cross Middle School:

Classroom Addition (Group A – Complex Addition)	=	\$ 1,002,758.00
Restroom Renovations (Group D – Renovations)	=	\$ 648,988.00
Walkway and Fencing (Group D – Renovations)	=	\$ 106,833.00
Site Drainage Corrections (Group D – Renovations)	=	\$ 297,188.00

Fee Calculation:

\$1,002,758 x 7.0%	=	\$	70,193
\$648,988 x 7.4%	=	\$	48,025
\$106,833 x 7.0%	=	\$	7,478
<u>\$297,188 x 8.0%</u>	=	\$	<u>23,775</u>
Total Basic Services Fee	=	\$	149,471
			(7.2% Prorated Fee)

4. Additional Services:

Our proposed Basic Services do not include the following and can be added as an additional service:

- a. Off-Site Civil Engineering
- b. Improvements to Public Utilities
- c. Storm Water Pollution Plans
- d. Special System Design and Engineering (Communications)
- e. Native Plant Preservation Plans
- f. Preparation of Record "As-Built" Documents
- g. Kitchen Equipment Design Consultant
- h. Code Variances
- i. Cost Estimating

Proposed Fee (Telecommunications Design)	\$55,000.00
Proposed Fee (Civil - Off-site Drainage Calculations)	\$10,000.00

Additional Services will be proposed on a per task basis and can be either a fixed fee or hourly based on the following billing rates:

Principal	\$120 / Hr.
Architect	\$ 90 / Hr.
CADD	\$ 65 / Hr.
Administration	\$ 50 / Hr.

5. Reimbursable Costs:

The following are considered reimbursable expenses which are not included in our basic services fee. Swaim Associates will bill these as direct cost with no mark-up.

- a. Printing and Reproductions of Owner review sets, Bid Sets and Presentation Materials
- b. Plan Review and Permit Fees

- c. Utility Review and Connection Fees
- d. Special Inspections
- e. Materials Testing
- f. Geotechnical Report
- g. Environmental Reports
- h. Topographical and ALTA Survey
- i. Archaeological Surveys

All work will be billed monthly based on the percentage of work completed. Swaim Associates Ltd. carries a \$4,000,000 E & O Policy. A Certificate of Insurance will be forwarded to you.

Please contact me with any questions you may have regarding this proposal and thank you for the opportunity to work with you on this project.

Sincerely,



Mark E. Bollard, AIA

Notary:

Signed and sworn into before me this, 30th day of October, 2012.

Notary Public: Carolyn Johnson

My Commission Expires: _____

'Attachment B' (cont)

October 30, 2012

Pete Burgard
Purchasing Manager
Amphitheater Unified School District No. 10
1001 W. Roger Road
Tucson, Arizona 85705

Re: RFQ 12-0017 Harelson Elementary School

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

FEE MULTIPLIER

Please	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%
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	\$ 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% to 5.0%	Up to 6.0%

1. Project Scope:

We understand that the proposed scope of this project to be a combination of new classroom additions and renovation improvements to Harelson Elementary School as outlined in the RFQ.

- a. Harelson Elementary School
 - 4 Classroom Addition
 - Modernize and Add ADA Restrooms
 - Technology: Re-cable Campus
 - MPR Acoustics, Renovate Walkways, and Security Fencing

The actual scope will be determined and confirmed in the programming and site investigation phase.

Based on recent past experience we estimate the required Construction Budget for classroom additions will be approximately \$200 to \$230/SF depending on available infrastructure and site improvements.

2. Basic Services:

- a. Basic Services include architectural, structural, mechanical, plumbing, electrical, on-site civil, and landscape architecture as defined in the Owner-Architect Agreement.

This fee includes weekly meetings during design, construction document development, and construction administration at the project sites.

3. Fee:

Our fee for the outlined work will be a percentage of the guaranteed maximum price using the School Facilities Board Architectural Fee Guidelines included previously in this letter. If desired Swaim Associates is agreeable to working on a fixed lump sum fee when the budget and scope are identified.

- a. Sample Fee for Harelson Elementary School:

Classroom Addition (Group A – Complex Addition)	=	\$ 996,288.00
Restroom Renovations (Group D – Renovations)	=	\$ 519,014.00
MPR Sound Attenuation (Group D – Renovations)	=	\$ 11,339.00
Renovate Covered Walkways & Security Fencing (Group D – Renovations)	=	\$ 69,172.00

Fee Calculation:

\$996,288 x 7.0%	=	\$	69,740
\$519,014 x 7.4%	=	\$	38,407
\$11,339 x 8.0%	=	\$	907
<u>\$69,172 x 7.0%</u>	=	\$	<u>4,842</u>
Total Basic Services Fee	=	\$	113,896 (7.1% Prorated Fee)

4. Additional Services:

Our proposed Basic Services do not include the following and can be added as an additional service:

- a. Off-Site Civil Engineering
- b. Improvements to Public Utilities
- c. Storm Water Pollution Plans
- d. Special System Design and Engineering (Communications)
- e. Native Plant Preservation Plans
- f. Preparation of Record "As-Built" Documents
- g. Kitchen Equipment Design Consultant
- h. Code Variances
- i. Cost Estimating

Proposed Fee (Telecommunications Design)	\$42,000.00
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Additional Services will be proposed on a per task basis and can be either a fixed fee or hourly based on the following billing rates:

Principal	\$120 / Hr.
Architect	\$ 90 / Hr.
CADD	\$ 65 / Hr.
Administration	\$ 50 / Hr.

5. Reimbursable Costs:

The following are considered reimbursable expenses which are not included in our basic services fee. Swaim Associates will bill these as direct cost with no mark-up.

- a. Printing and Reproductions of Owner review sets, Bid Sets and Presentation Materials
- b. Plan Review and Permit Fees

- c. Utility Review and Connection Fees
- d. Special Inspections
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Please contact me with any questions you may have regarding this proposal and thank you for the opportunity to work with you on this project.

Sincerely,



Mark E. Bollard, AIA

Notary:

Signed and sworn into before me this, 30th day of October, 2012.

Notary Public: Carolyn Johnson

My Commission Expires: _____