



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

DATE OF MEETING: August 23, 2011

TITLE: Approval of Bond-Related Projects

- 2) Award of Contract for Architectural Services for Facility Improvements
Canyon del Oro High School Based on Responses to Request for
Qualifications (RFQ) 10-0073**
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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 (10-0073) 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 Canyon del Oro High School as identified in the May 2007 Blue Ribbon Budget Analysis and Facilities Needs Committee Report.

The scope of work includes renovating the kitchen & multi-purpose room, providing ADA compliant restrooms, refurbishing locker rooms, campus cabling requirements, football field turf & bleacher renovation, ramp access to the Fine Arts Performance Center and the constructing of 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 Swaim Associates, LTD Architects based on their response to RFQ 10-0073.

INITIATED BY:

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 Marsha Volpe, Principal CDO High 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 facilities to include kitchen renovations and ADA compliant restrooms.
2. The firm's demonstrated record of performance, design and renovation of K-12 facilities 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 - renovations to kitchen facilities.
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, CDG Architects, DLR Group, Corgan, Sakellar Group and Earl Kai Chann. The five highest ranked vendors were Sakellar Group, NTD Architecture, EMC2, Swaim and Burns Wald-Hopkins Shambach. Each vendor was provided a meeting agenda with discussion points covering different aspect of the scope of work at Canyon del Oro High School.

Evaluation Phase #2, Discussion Points:

- 1) A centralized production area, equipment & some storage to support a food court concept with a grill, salad bar, deli, small steam table, a breakfast bar, wrap station to provide tortillas, etc. and a smoothie station is one option for our renovated kitchen/ dining facility. Give us your thoughts. What are high school students looking for in a dining facility? What type of décor, sound system, seating, wireless service, etc.? Help us make the leap from steam tables.
- 2) Locker rooms, shower rooms and campus restrooms in new high school construction have a totally different design, traffic flow and FF&E than what is currently in place at CDO HS. Update us on what is new & exciting, what works, the maintenance required, floor coverings, lighting and user acceptance, etc. for these facilities.
- 3) A goal of this project is to renovate the 7,200 square foot school Administration Building to provide functional & user friendly work spaces, efficient traffic flows and allow for security requirements while at the same time designing a space that welcomes the public to this beautiful campus. Budget is a consideration. Your firm has undoubtedly addressed owner challenges to transform a work space, working with a minimal budget, to create something special that more than met the owners expectations. Tell the us about one such project.
- 4) New classrooms to replace aging portables are included in the scope of work. There are options for the delivery of technology to these classrooms. Tell us about the options currently available, their cost and what we might expect to see in the future.

5) Evaluation Team Questions

The Evaluation Team ranked each vendor based on their response to the five agenda items listed. Based on their presentation Swaim Associates, LTD Architects was rated first followed by Sakellar Group, EMC2, Burns Wald-Hopkins Shambach and NTD Architects. The Evaluation Team acknowledged any one of these five firms could provide architectural services which would more than meet the scope of work requirements.

A concern of the Evaluation Committee is the renovation of the kitchen and multi-purpose room. The goal is to repurpose this area as a student commons with a food court with multiple dining options. Swaim Associates provided excellent examples of reconfigured cafeterias which now successfully cater to a high school student clientele. They recommended a stage be incorporated into the design to allow student performing groups, class programs, speakers, etc. to present in the commons area. Other recommendations were seating clusters, alternate furniture styles, roll up to doors to exterior venues, a sound system, and healthy choice meals provided prepared to a students request. Swaim Associates addressed locker room specifications to include rubber tile floors for cleats, durable moisture resistant lighting, toilet patricians, locker placement, etc. The Evaluation Committee was most impressed with Swaim's response to Administration Building renovation question. They spoke of safety & security, defining a main entrance, view corridors, separating functions; the administration from nursing, the student career center, the vice-principals office, etc. They provided three examples of administration building remodels completed for under \$80,000. Based on their presentation, their ability to provide in depth & relevant design suggestions to address each area of the scope of work required at Canyon del Oro High School Swaim Associates was selected as the firm recommended for an award of contract.

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.

Swaim Associates fee will be a percentage of the guaranteed maximum price using the Arizona School Facilities Board (SFB) architectural fee scheduled 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 Swaim Associates is 7.2% which will cover the Program System Elements as designated in the Amphitheater USD Facilities Assessment to include new classrooms, locker room, MPR & kitchen renovation, ADA restroom compliance, communications and athletic field upgrades.

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

Chris Louth, Bond Projects Manager has reviewed the fee schedule provided by Swaim 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% 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.

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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August 11, 2011

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

Re: RFQ 10-0073 – CDO High 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 is 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%

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1. Project Scope:

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

- a. CDO High School
 - Classroom Addition
 - MPR/Kitchen Upgrades
 - Modernize and Add ADA Restrooms
 - Security Fencing
 - Team Locker Room Remodel
 - Communications System Upgrade
 - Football Bleacher Corrections
 - Renovate Ramp

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 / S.F. 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. Preparation of LEED certification documentation is included in our Basic Services.

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 CDO High School
 - Classroom Addition = \$ 1,060,000.00
 - (Group A – Complex Addition)
- b. Restroom Renovations = \$ 1,575,000.00
 - (Group D – Renovations)
- c. MPR/Kitchen Improvements Budget = \$ 2,400,000.00
 - (Group D – Renovations)

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d. Renovate Ramp (Group D- Renovations)	=	\$ 9,000.00
e. Security Fencing Upgrades (Group D- Renovations)	=	\$ 93,000.00
f. Communications Upgrades (Group D-Renovations)	=	\$ 1,000,000.00
g. Remodel Team Locker Rooms (Group D-Renovations)	=	\$ 425,000.00
h. Football Bleacher Corrections (Group D-Renovations)	=	\$ 350,000.00

Fee Calculation

a.	1,060,000.00 x 7.0%	=	\$74,200.00
b.	1,575,000.00 x 7.2%	=	\$113,400.00
c.	2,400,000.00 x 7.2%	=	\$172,800.00
d.	9,000.00 x 8.0%	=	720.00
e.	93,000.00 x 8.0%	=	7,440.00
f.	1,000,000.00 x 7.2%	=	72,000.00
g.	425,000.00 x 7.2%	=	30,600.00
h.	350,000.00 x 7.2%	=	25,200.00

Total Basic Services Fee	=	496,360.00
		(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
- e. Native Plant Preservation Plans
- f. Preparation of Record "As-Built" Documents
- g. Kitchen Equipment Design Consultant
- h. Code Variances
- i. Cost Estimating

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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
- 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,

A handwritten signature in black ink, appearing to read "M E BOLLARD".

Mark E. Bollard, AIA

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