



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

DATE OF MEETING: March 6, 2012

TITLE: Approval of Bond-Related Projects

- 1) Award of Contract for Architectural Services for Facility Improvements at Holaway Elementary School Based on Responses to Request for Qualifications (RFQ) 11-0028**
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BACKGROUND:

Pursuant to the requirements of Arizona Administrative Code R 7-2-1118, a notice of Request for Qualifications (RFQ) for Professional Architectural Services was posted to the District's Web site. All architectural services vendors registered with the Purchasing Department were notified of the posting. Request for Qualifications 11-0028 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 Holaway Elementary School as identified in the May 2007 Blue Ribbon Budget Analysis and Facilities Needs Committee Report.

The scope of work addressed the following campus needs; library renovation to include new instructional space & energy efficient lighting, ADA compliant restrooms, eight new classrooms to replace aging portable buildings and the installation of information technology cabling. 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. A meeting agenda was provided. The top ranked vendor after discussions was asked to provide certified cost and pricing data for the proposed work.

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 Request for Qualifications (RFQ) 11-0028.

INITIATED BY:

A handwritten signature in cursive script that reads "Scott Little".

Scott Little, Chief Financial Officer

Date: February 28, 2011

A handwritten signature in cursive script that reads "Vicki Balentine".

Vicki Balentine, Ph.D., Superintendent

Evaluation Phase #1:

The evaluation team, Chris Louth, Bond Projects Manager, Brian Nottingham, Assistant Bond Projects Manager, Tanya Wall, Assistant Principal Amphitheater Middle School, Pat Sledge, Assistant Manager Operational Support & Tony Young, Energy Resource Coordinator 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 ADA compliant restrooms.
2. The firm's demonstrated record of performance, design and renovation of elementary school 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 nine responding vendors evaluated were NTD Architecture, Breckenridge Group, Line & Space, EMC2, Swaim Associates, Burns Wald-Hopkins Shambach, WSM Architects, GLHN, and Sakellar Associates.

The three highest ranked vendors selected for discussions were EMC2, Swaim Associates and Burns Wald-Hopkins Shambach. Each vendor was provided a meeting agenda with discussion points covering different aspect of the scope of work at Holaway Elementary School.

Evaluation Phase #2, Discussion Points:

1) Vendors responding to the RFQ were asked to provide design information on three institutional projects. The text targeted creative solutions utilized, owner & ADA requirements and continuity of design existing structures & new construction. Pick one of your three projects and drill down. Tell the evaluation team in some detail what your team did to meet the above requirements and others. How does the project described relate to the scope of work at Holaway Elementary School?

2) Construction Administration: a commitment to the project, availability / site monitoring. If you were to provide a job description for a construction administrator what would it entail? Will your company provide the services as just describe. Please explain in relation to the Holaway project.

3) The scope of work at Holaway Elementary School requires cabling the entire site with Cat Six cable. Past installations have required the District to spend many hours rectifying classrooms with missing ceiling tiles, damaged furniture, construction derbies, doors left unsecured, loss of classroom equipment, etc. How will your firm attend to these pervasive problems? How will the Cat Six cable installation be integrated with the rest of the project?

Evaluation Team: Questions

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 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. The Swaim Associates presenters, two architects & a registered communications distribution designer spoke to the committee in detail of previous elementary schools renovations similar in scope to the work at Holaway. In one example Swaim, working with the municipal planning & zoning office, was able to reduce the number of code required bathroom fixtures & restrooms based changes in campus enrollment, providing a considerable cost savings. Swaim Associates spoke of bi-weekly seminars for all staff members on new technologies & products to the construction industry. For the work required at Holaway Elementary School the evaluation team voted Swaim Associates 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.

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.

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.

Chris Louth, 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

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'



February 23, 2012

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

Re: RFQ 11-0028 Holaway Elementary 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%

7350 E SPEEDWAY 210
TUCSON, ARIZONA 85710
(520) 326-3700 FAX 326-1148



1. Project Scope:

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

- a. Holaway Elementary School
 - 10 Classroom Addition
 - Modernize and Add ADA Restrooms
 - Technology: Re-cable Campus

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 Holaway Elementary School		
Classroom Addition	=	\$2,520,038.00
(Group A – Complex Addition)		
Restroom Renovations	=	\$ 551,452.00
(Group D – Renovations)		

Fee Calculation:

$\$2,520,038 \times 6.5\%$	=	\$ 163,802.00
$\$551,452 \times 7.4\%$	=	\$ 40,807.00
Total Basic Services Fee	=	\$ 204,609.00
		(6.7% Prorated Fee)

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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) \$28,000.00

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

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- 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,

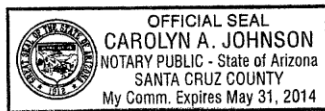
Mark E. Bollard, AIA

Notary:

Signed and sworn into before me this, 23rd day of February, 2012.

Notary Public: Carolyn Johnson

My Commission Expires: May 31, 2014



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