

# Piggyback No. 5: Portable, Modular, and Pre-Fabricated Solutions

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## TAB D: *Ancillary Services*



**TAB D: Ancillary Services, Bid Option 2 (Must include TABs B-D)**

SPECIFICATIONS/PRICING MATRIX.....922

- RFP LINE ITEMS
- FACILITIE NEEDS SOFTWARE AND RELATED ITEMS
- INTERIOR/EXTERIOR "FINISH" DESIGN WORK
- PRE-BID PLANS & SPECIFICATIONS AUDIT AND REVIEW
- MODERNIZATION SUSTAINABILITY COORDINATOR
- SAFER ALTERNATIVE ANALYSIS DESIGN WORK
- ARCHITECTURAL SERVICES
- CALCULATING SCHOOL CAPACITY
- DSA COMPLIANCE

BASIS OF AWARD SUMMARY Bid Option 2, Tab D: *Ancillary Services*.....

## TAB D: *Ancillary Services*

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## **ANCILLARY SERVICES**

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### **RFP LINE ITEM**

### **DESIGN/BID/BUILD**

### **Specification No. L1**

We propose to provide the District with comprehensive and specialized services related to all components of public works bidding through standard design/bid/build process.

These services include presentation to the Board of Education on this delivery method, the applicable legal requirements, preparation and consultation of all bidding documents, including all pre-bid contract documents, contracts with design professional teams, construction management and bid solicitation documents.

The team will further review bid results with District staff and provide guidance regarding bid results, acceptance and/or rejection of bids, possible re-bid and all issues related to bidder responsibility/non-responsibility and overall bid responsiveness.

The team will assist the District in review of all applicable post-bid project contract documents, including insurance certificates, workers compensation documentation, licensing, bid bonds, labor/material payment bonds and performance bonds required by general contractor.

The team will assist the District with any pre-qualification issues, including statutory pre-qualification mandates set forth in the Public Contract Code and any subcontractor listing issues which may raise. The team will also assist the District in relation to any District-specific project requirements, including, but not limited to, green building.

## **ANCILLARY SERVICES**

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### **RFP LINE ITEM**

### **DESIGN/BUILD**

### **Specification No. L2**

We propose to provide the District will comprehensive and specialized services related to all components of public works bidding through standard design/build process.

These services include presentation to the Board of Education on this delivery method, the applicable requirements, preparation and consultation of all RFP documents, and master contracts with any design professionals or construction management teams.

The team will further review RFP results with District staff and provide guidance regarding selection of the winning design/builder and preparation of design/build agreement.

The team will assist the District in review of all project contract documents, including insurance certificates, workers compensation documentation, licensing, bid bonds, labor/material payment bonds and performance bonds required by design/builder.

The team will assist the District with any pre-qualification issues, including statutory pre-qualification mandates set forth in the Public Contract Code and any subcontractor listing issues which may raise. The team will also assist the District in relation to any District-specific project requirements, including, but not limited to, green building

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### **RFP LINE ITEM**

### **LEASE/LEASBACK**

### **Specification No. L3**

We propose to provide the District will comprehensive and specialized services related to all components of public works bidding through lease/leaseback process.

These services include presentation to the Board of Education on this delivery method, the applicable legal requirements, preparation and consultation of all RFP documents, and master contracts with any design professionals or construction management teams.

The team will further review RFP results with District staff and provide guidance regarding selection of the winning builder and preparation of the contract documents, including but not limited to, the project contract, site lease and facility lease and all finance terms for the lease/leaseback arrangement.

The team will assist the District in review of all project contract documents, including insurance certificates, workers compensation documentation, licensing, bid bonds, labor/material payment bonds and performance bonds required by the builder.

The team will assist the District with any pre-qualification issues, including statutory pre-qualification mandates set forth in the Public Contract Code and any subcontractor listing issues which may raise. The legal team will also assist the District in relation to any District-specific project requirements, including, but not limited to, green building.

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### **RFP LINE ITEM**

### **MULTI-PRIME**

### **Specification No. L4**

We propose to provide the District will comprehensive and specialized services related to all components of public works bidding through the multi-prime process.

These services include presentation to the Board of Education on this delivery method, the applicable legal requirements, preparation and consultation of all bidding documents, including all pre-bid contract documents, bid packages, contracts with design professional teams, construction management and bid solicitation documents.

The team will further review bid results with District staff and provide guidance regarding bid results, acceptance and/or rejection of bids, possible re-bid and all issues related to bidder responsibility/non-responsibility and overall bid responsiveness.

The team will assist the District in review of all applicable post-bid project contract documents, including insurance certificates, workers compensation documentation, licensing, bid bonds, labor/material payment bonds and performance bonds required by general contractor.

The team will assist the District with any pre-qualification issues, including statutory pre-qualification mandates set forth in the Public Contract Code and any subcontractor listing issues which may raise. The team will also assist the District in relation to any District-specific project requirements, including, but not limited to, green building

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# PRICING MATRIX

Item No.	NAICS Codes	SIC Code(s)	Schedule of Supplies/Services	Description	Specification	Basic Setup Fee	UOM	Price
DBB-L1	CCL1 Design Bid Build	CC1959L1 Design Bid Build	Comprehensive and specialized Legal Services/ Design Bid Build	A legal team will assist the District with any prequalification issues contract documents, insurance certificates and related items.	L1	\$ 750.00	daily service rate + travel and per diem if required	\$20,000 per day
DBB-L2	CCL2 Design Build	CC1959L2 Design Build	Comprehensive and specialized Legal Services/ Design Build	A legal team will assist the District with any prequalification issues contract documents, insurance certificates and related items.	L2	\$ 750.00	daily service rate + travel and per diem if required	\$30,000 per day
DBB-L3	CCL3 Lease/Lesseeback	CC1959L3 Lease/Lesseeback	Comprehensive and specialized legal services/ lease/ lesseeback	A legal team will assist the District with any prequalification issues contract documents, insurance certificates and related items.	L3	\$ 750.00	daily service rate + travel and per diem if required	\$30,000 per day
DBB-L4	CCL4 Multi Prime	CC1959L4 Multi Prime	Comprehensive and specialized legal services/ multi prime	A legal team will assist the District with any prequalification issues contract documents, insurance certificates and related items.	L4	\$ 750.00	daily service rate + travel and per diem if required	\$30,000 per day



## ANCILLARY SERVICES

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# ANCILLARY SERVICES

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## SPECIFICATION A- Requirements

### Work Order Management Software

#### Bid Requirements:

1. Work Order Management Software Features:

System capabilities and functionality: Software must address, but not be limited to, the concepts of work order management, preventive maintenance and repair, labor and resource management, scheduling, hazardous materials tracking, building space and asset management, vehicle maintenance, equipment management, landscape maintenance, labor management, and related document management.

User Restrictions: The Proposer shall have the ability to set restrictions and controls at appropriate levels (i.e. set up new users, terminate or cancel users, change or modify user limits, change passwords, etc.). The Proposer's software shall have the capability to allow the Designated Administrator to initially set and later make changes to the restrictions and controls on individual accounts, within certain defined limits. The Designated Administrator shall also have the ability to activate certain accounts which may be reserved for emergency or temporary use.

Reports: Proposer shall provide reports that show daily, weekly, monthly and yearly transaction detail by Department and by end user. Summary Reports shall also be produced and must be capable of showing transactions by user, department, cost analysis, and other reports as necessary. Reports shall enable District to fully understand and manage the labor activities and costs associated with the provision of the services provided.

The following reports shall be available for all maintenance department office users:

Daily, Weekly, Monthly and Yearly Transaction Reports:

Established per individual account and flexible enough to indicate trend lines.

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### Trend Analysis:

Provide evaluation reports on daily, weekly, monthly, and yearly mobilization of labor efforts; using ongoing history, provide advanced analysis of peak labor expectations and costs of service indicators.

### Trend Cost Analysis:

Breakdown of District labor expenses associated with the provision of subscribed services.

### Advanced technologies:

System shall be web enabled (accessible from any Web browser), and support technologies, but not limited to, bar coding, internal e-mailing, internal graphical emulation, hand-held device interfacing (tablet, PDA, Cell Phones, etc.).

### Technical Requirements:

Software must support the environment and functions described below. No other solutions will be considered as qualifying proposals:

- The server database platform shall be Microsoft SQL compatible.
  - The system architecture must support the TCP/IP network protocol for use with all major Web Browser interfaces.
  - The system must support Microsoft Windows Graphical User Interface (GUI) standards.
  - The system must be able to send e-mails from within the application utilizing standard SMTP POP 3 protocol.
  - System should fulfill all requirements "out-of-the-box" without changes or modifications to underlying tables, structures, or codes.

### Sale of Client or User Information:

The Proposer shall not sell, rent or otherwise distribute a list of participating users, their addresses or any other information to any person, firm or other entity for any purpose.

### Base Setup:

Basic setup by Proposer shall include importing and setup of all static data points required for system to work properly (e.g. Properties, Users, Assets, Budgets, etc.).

### Exporting:

Data contained within system shall be exportable by District at will.

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### 2. Training:

The Proposer shall provide training to Purchasing Entities as follows:

#### Contract Start-Up Training Session:

At the start of the contract, the Proposer shall provide initial on-site training to key staff designated by the public agency client. The initial training will address benefits and features of software system, utilization and operational procedures, available reports, and any other feature associated with the program.

#### Training Materials:

Proposer shall provide electronic printable materials that may be used by school district staff to train responsible employees and individual users in the proper use of the system. Proposer will provide electronic additional copies of training materials, as required to effectively use the system, at no additional cost. Regular updates and informational reports shall also be made available to authorized users. Authorized school district staff may copy and distribute Proposer-provided materials to staff at no extra cost.

#### Telephone Support:

Proposer shall provide the name, e-mail address and telephone number of a point-of- contact who will be available by telephone and e-mail to answer questions that may arise during training of staff or to provide brief training sessions in person or by telephone to new Program Coordinators or other approved individuals. Proposers shall describe the hours this support will be available and any associated costs. All help desk activities shall be available during normal California school business hours and the operations of the help desk must be located in the United States of America.

#### Additional Training Programs:

Proposers shall describe any additional training programs, videos, printed materials, or other aids that may be available and make these items available for use upon request and the costs associated with this training or support, if any.

### 3. Customer Support:

Upon award, Proposer shall provide customer support to the Designated Administrator and end users as reasonably necessary. List the name, title, office address, telephone number, fax number, and e- mail address (if available) of the person(s) who will provide the services required hereunder. Information regarding general personnel (e.g. individual help desk operators need not be provided). This support shall include at a minimum:

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The name, title, e-mail address and telephone number of the customer account representative and alternate who would respond to inquiries by the Designated Administrator or agent.

The name, title, e-mail address and telephone number of the technical representative and alternate who would respond to inquiries by the Designated Administrator or their agent.

#### 4. Changes in Contact Accounts:

The Designated Administrator or agent may request changes to a District individual account. Such changes may include additional or deletion of departmental account details, modifications to informational reports, additional controls or restrictions, and other information which could be of assistance in providing comprehensive analysis of labor activities. These changes may be made in writing, on-line (email or web access), or orally with written, fax or electronic mail confirmation follow-up within five (5) business days.

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## SPECIFICATION B- Requirements

### Mobile Work Order Management Application

#### Bid Requirements:

#### **Mobile Work Order Management Application Features:**

##### Mobile Application:

A mobile software application designed for an Apple iPad based platform that allows for the operation and processing of work orders on-line or off-line.

##### Security:

The Proposer software shall have the ability to set restrictions and controls for the management of users (i.e. terminate or cancel users, change passwords, etc.).

##### Access and Reporting:

Proposer shall provide method of reporting that show daily, weekly, monthly and yearly transaction detail by Department and by end user. Summary Reports shall also be produced and must be capable of showing transactions by user, department, cost analysis, and other reports as necessary. Reports shall enable District to fully understand and manage the labor activities and costs associated with the provision of the services provided.

##### System capabilities and functionality:

Application shall have the ability to open, close, edit, add new, close, schedule date, track labor/materials used per work order, and attach files to work orders. Software must address, but not be limited to, the concepts of work order management, preventive maintenance and repair, labor and resource management, scheduling, hazardous materials tracking, building space and asset management, vehicle maintenance, equipment management, landscape maintenance, labor management, and related document management.

##### Advanced technologies:

System shall be web enabled (accessible from any Web browser), and support technologies, but not limited to, bar coding, internal e-mailing, internal graphical emulation, hand-held device interfacing (tablet, PDA, Cell Phones, etc.).

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### **Technical Requirements:**

Software must support the environment and functions described below. No other solutions will be considered as qualifying proposals:

- The server database platform shall be Microsoft SQL compatible.
- The system architecture must support the TCP/IP network protocol for use with all major Web Browser interfaces.
- System should fulfill all requirements "out-of-the-box" without changes or modifications to underlying tables, structures, or codes.

### **Sale of Client or User Information:**

The Proposer shall not sell, rent or otherwise distribute a list of participating users, their addresses or any other information to any person, firm or other entity for any purpose.

### **Training:**

The Proposer shall provide training to Purchasing Entities as follows:

#### **Contract Start-Up Training Session:**

At the start of the contract, the Proposer shall provide initial on-site training to key staff designated by the public agency client. The initial training will address benefits and features of software system, utilization and operational procedures, available reports, and any other feature associated with the program(s).

#### **Training Materials:**

Proposer shall provide electronic printable materials that may be used by school district staff to train responsible employees and individual users in the proper use of the system. Proposer will provide electronic additional copies of training materials, as required to effectively use the system, at no additional cost. Regular updates and informational reports shall also be made available to authorized users. Authorized school district staff may copy and distribute Proposer-provided materials to staff at no extra cost.

#### **Telephone Support:**

Proposer shall provide the name, e-mail address and telephone number of a point-of-contact who will be available by telephone and e-mail to answer questions that may arise during training of staff or to provide brief training sessions in person or by telephone to new Program Coordinators or other approved individuals. Proposers shall describe the hours this support will be available and any associated costs. All help desk activities shall be available during normal California school business hours and the operations of the help desk must be located in the United States of America.

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### Additional Training Programs:

Proposers shall describe any additional training programs, videos, printed materials, or other aids that may be available and make these items available for use upon request and the costs associated with this training or support, if any.

### Customer Support:

Upon award, proposer shall provide customer support to the Designated Administrator and end users as reasonably necessary. List the name, title, office address, telephone number, fax number, and e-mail address (if available) of the person(s) who will provide the services required hereunder. Information regarding general personnel (e.g. individual help desk operators need not be provided}. This support shall include at a minimum:

- The name, title, e-mail address and telephone number of the customer account representative and alternate who would respond to inquiries by the Designated Administrator or agent.
- The name, title, e-mail address and telephone number of the technical representative and alternate who would respond to inquiries by the Designated Administrator or their agent.

### Changes in Contact Accounts:

The Designated Administrator or agent may request changes to a District individual account. Such changes may include additional or deletion of departmental account details, modifications to informational reports, additional controls or restrictions, and other information which could be of assistance in providing comprehensive analysis of labor activities. These changes may be made in writing, on-line (email or web access), or orally with written, fax or electronic mail confirmation follow-up within five (5) business days.

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## SPECIFICATION C • Requirements

### Asset Tracking Software

#### Bid Requirements:

##### **Asset Tracking Software Features:**

###### Overview:

Proposer solution shall be a barcode based asset tracking system to catalog, inventory, track, and identify locations of assets.

###### System capabilities and functionality:

Software must address, but not be limited to, the concepts of asset tracking. System must be able to interface with existing industry standard bar code standard Code 3 of 9 for ease of inventory assessment. System shall support basic life cycle tracking of assets.

###### User Restrictions:

The Proposer shall have the ability to set restrictions and controls at appropriate levels i.e. set up new users, terminate or cancel users, change or modify user limits, change passwords, etc.). The Proposer's software shall have the capability to allow the Designated Administrator to initially set and later make changes to the restrictions and controls on individual accounts, within certain defined limits. The Designated Administrator shall also have the ability to activate certain accounts which may be reserved for emergency or temporary use.

###### Reports:

Proposer shall provide reports that show inventory, location, inspections logs, last inspections conducted, next inspections due; cost/value of inventory.

###### Required Supporting Technologies:

System shall be web enabled (accessible from any web browser), and support technologies, but not limited to, bar coding, internal e-mailing, internal graphical emulation, hand-held device interfacing (tablet, PDA, Cell Phones, etc.).

###### Technical Requirements:

Software must support the environment and functions described below. No other solutions will be considered as qualifying proposals.

- The server database platform's shall be Microsoft SQL compatible.
- The system architecture must support the TCP/IP network protocol for use with all major Web Browser interfaces.
- The system shall support mobile device use.

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- Utilize bar code standard Code 3 of 9 for all bar code items:
  - properties
  - locations
  - people
  - assets

The system must be able to send e-mails from within the application utilizing standard SMTP POP 3 protocol.

System should fulfill all requirements "out-of-the-box" without changes or modifications to underlying tables, structures, or codes.

### Requisite Bar Code Readers/kits:

System should include all requisite hardware to support 4 staff members conducting inventory.

### Sale of Client or User Information:

The Proposer shall not sell, rent or otherwise distribute a list of participating users, their addresses or any other information to any person, firm or other entity for any purpose.

### **Training:**

The Proposer shall provide training to Purchasing Entities as follows:

### Contract Start-Up Training Session:

At the start of the contract, the Proposer shall provide initial on-site training to key staff designated by the public agency client. The initial training will address benefits and features of software system, utilization and operational procedures, available reports, and any other feature associated with the program(s).

### Training Materials:

Proposer shall provide electronic printable materials that may be used by school district staff to train responsible employees and individual users in the proper use of the system. Proposer will provide electronic additional copies of training materials, as required to effectively use the system, at no additional cost. Regular updates and informational reports shall also be made available to authorized users. Authorized school district staff may copy and distribute Proposer-provided materials to staff at no extra cost.

### Telephone Support:

Proposer shall provide the name, e-mail address and telephone number of a point-of-contact who will be available by telephone and e-mail to answer questions that may arise during training of staff or to provide brief training sessions in person or by telephone to new Program Coordinators or other approved individuals. Proposers shall describe the hours this support will be available and any associated costs. All help desk activities shall

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be available during normal California school business hours and the operations of the help desk must be located in the United States of America

### **Additional Training Programs:**

Proposers shall describe any additional training programs, videos, printed materials, or other aids that may be available and make these items available for use upon request and the costs associated with this training or support, if any.

### **Customer Support:**

Upon award, proposer shall provide customer support to the Designated Administrator and end users as reasonably necessary. List the name, title, office address, telephone number, fax number, and e-mail address (if available) of the person(s) who will provide the services required hereunder. Information regarding general personnel (e.g. individual help desk operators need not be provided). This support shall include at a minimum:

- The name, title, e-mail address and telephone number of the customer account representative and alternate who would respond to inquiries by the Designated Administrator or agent.
- The name, title, e-mail address and telephone number of the technical representative and alternate who would respond to inquiries by the Designated Administrator or their agent.

### **Changes in Contact Accounts:**

The Designated Administrator or agent may request changes to a District individual account. Such changes may include additional or deletion of departmental account details, modifications to informational reports, additional controls or restrictions, and other information which could be of assistance in providing comprehensive analysis of labor activities. These changes may be made in writing, on-line (email or web access), or orally with written, fax or electronic mail confirmation follow-up within five (5) business days.

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## SPECIFICATION D- Requirements

### Technical Support Desk, Management Software

#### Bid Requirements:

#### Technical Support Desk, Management Software Features:

##### Overview:

District seeking an out-of-the-box cloud based technical support management system to manage support tickets, support staff, information technology equipment, software licenses and versions on computers, labor spent on tickets, a dashboard of departmental metrics toward providing analytics of productivity.

##### User Restrictions:

The Proposer shall have the ability to set restrictions and controls at appropriate levels (i.e. set up new users, terminate or cancel users, change or modify user limits, change passwords, etc.). The Proposer's software shall have the capability to allow the Designated Administrator to initially set and later make changes to the restrictions and controls on individual accounts, within certain defined limits. The Designated Administrator shall also have the ability to activate certain accounts which may be reserved for emergency or temporary use.

##### Reports:

Proposer shall provide reports that show daily, weekly, monthly and yearly transaction detail by school, department and by technician. Summary Reports shall also be produced and must be capable of showing transactions by user, department, cost analysis, and other reports as necessary. Reports shall enable District to fully understand and manage the labor activities and costs associated with the provision of the services provided. Equipment reports shall include last inspection types, and location within district.

##### Advanced technologies:

System shall be web enabled (accessible from any Web browser), and support technologies, but not limited to, internal e-mailing, internal graphical emulation, hand-held device interfacing (tablet, PDA, Cell Phones, etc.).

##### Technical Requirements:

Software must support the environment and functions described below. No other solutions will be considered as qualifying proposals:

- The server database platform shall be Microsoft SQL compatible.

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- The system architecture must support the TCP/IP network protocol for use with all major Web Browser interfaces.
- The system must be able to send e-mails from within the application utilizing standard SMTP POP 3 protocol.
- System should fulfill all requirements "out-of-the-box" without changes or modifications to underlying tables, structures, or codes.

### Sale of Client or User Information:

The Proposer shall not sell, rent or otherwise distribute a list of participating users, their addresses or any other information to any person, firm or other entity for any purpose.

### **Training:**

The Proposer shall provide training to Purchasing Entities as follows:

### Contract Start-Up Training Session:

At the start of the contract, the Proposer shall provide initial on-site training to key staff designated by the public agency client. The initial training will address benefits and features of software system, utilization and operational procedures, available reports, and any other feature associated with the program(s).

### Training Materials:

Proposer shall provide electronic printable materials that may be used by school district staff to train responsible employees and individual users in the proper use of the system. Proposer will provide electronic additional copies of training materials, as required to effectively use the system, at no additional cost. Regular updates and informational reports shall also be made available to authorized users. Authorized school district staff may copy and distribute Proposer-provided materials to staff at no extra cost.

### Telephone Support:

Proposer shall provide the name, e-mail address and telephone number of a point-of-contact who will be available by telephone and e-mail to answer questions that may arise during training of staff or to provide brief training sessions in person or by telephone to new Program Coordinators or other approved individuals. Proposers shall describe the hours this support will be available and any associated costs. All help desk activities shall be available during normal California school business hours and the operations of the help desk must be located in the United States of America.

### Additional Training Programs:

Proposers shall describe any additional training programs, videos, printed materials, or other aids that may be available and make these items available for use upon request and the costs associated with this training or support, if any.

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### **Customer Support:**

Upon award, proposer shall provide customer support to the Designated Administrator and end users as reasonably necessary. List the name, title, office address, telephone number, fax number, and e-mail address (if available) of the person(s) who will provide the services required hereunder. Information regarding general personnel (e.g. individual help desk operators need not be provided). This support shall include at a minimum:

- The name, title, e-mail address and telephone number of the customer account representative and alternate who would respond to inquiries by the Designated Administrator or agent.
- The name, title, e-mail address and telephone number of the technical representative and alternate who would respond to inquiries by the Designated Administrator or their agents.

### **Changes in Contact Accounts:**

The Designated Administrator or agent may request changes to a District individual account. Such changes may include additional or deletion of departmental account details, modifications to informational reports, additional controls or restrictions, and other information which could be of assistance in providing comprehensive analysis of labor activities. These changes may be made in writing, on-line (email or web access), or orally with written, fax or electronic mail confirmation follow-up within five (5) business days.

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## SPECIFICATION E •

### Requirements Fire & Life Safety Management Software

#### Bid Requirements:

#### Fire & Life Safety Equipment Management Software Features:

##### System capabilities and functionality:

Software must address, but not be limited to, the concepts of management, preventive maintenance and repair or replacement of equipment and systems in support of standard NFPA (The National Fire Protection Association) fire and life safety requirements.

##### User Restrictions:

The Proposer shall have the ability to set restrictions and controls at appropriate levels (i.e. set up new users, terminate or cancel users, change or modify user limits, change passwords, etc.). The Proposer's software shall have the capability to allow the Designated Administrator to initially set and later make changes to the restrictions and controls on individual accounts, within certain defined limits. The Designated Administrator shall also have the ability to activate certain accounts which may be reserved for emergency or temporary use.

##### Reports:

Proposer shall provide reports that show daily, weekly, monthly and yearly transaction detail by Department and by end user. Summary Reports shall also be produced and must be capable of showing transactions by user, department, cost analysis, and other reports as necessary. Reports shall enable District to fully understand and manage the labor activities and costs associated with the provision of the services provided.

##### Advanced technologies:

System shall be web enabled (accessible from any web browser), and support technologies, but not limited to, bar coding, internal e-mailing, internal graphical emulation, hand-held device interfacing (tablet, PDA, Cell Phones, etc.).

##### Technical Requirements:

Software must support the environment and functions described below. No other solutions will be considered as qualifying proposals:

- The server database platform shall be Microsoft SQL compatible.
- The system architecture must support the TCP/IP network protocol for use with all major Web Browser interfaces.
- The system must be able to send e-mails from within the application utilizing standard SMTP POP 3 protocol.

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- System should fulfill all requirements "out-of-the-box" without changes or modifications to underlying tables, structures, or codes.
- The system shall support mobile device use.
- The system shall utilize bar code standard Code 3 of 9 for all bar code items:
  - properties
  - locations
  - people
  - assets

### Requisite Bar Code Readers/kits:

System should include all requisite hardware to support staff members conducting inventory.

### Sale of Client or User Information:

The Proposer shall not sell, rent or otherwise distribute a list of participating users, their addresses or any other information to any person, firm or other entity for any purpose.

### **Training:**

The Proposer shall provide training to Purchasing Entities as follows:

### Contract Start-Up Training Session:

At the start of the contract, the Proposer shall provide initial on-site training to key staff designated by the public agency client. The initial training will address benefits and features of software system, utilization and operational procedures, available reports, and any other feature associated with the program(s).

### Training Materials:

Proposer shall provide electronic printable materials that may be used by school district staff to train responsible employees and individual users in the proper use of the system. Proposer will provide electronic additional copies of training materials, as required to effectively use the system, at no additional cost. Regular updates and informational reports shall also be made available to authorized users. Authorized school district staff may copy and distribute Proposer-provided materials to staff at no extra cost.

### Telephone Support:

Proposer shall provide the name, e-mail address and telephone number of a point-of-contact who will be available by telephone and e-mail to answer questions that may arise during training of staff or to provide brief training sessions in person or by telephone to new Program Coordinators or other approved individuals. Proposers shall describe the hours this support will be available and any associated costs. All help desk activities shall be available during normal California school business hours and the operations of the help desk must be located in the United States of America.



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### Additional Training Programs:

Proposers shall describe any additional training programs, videos, printed materials, or other aids that may be available and make these items available for use upon request and the costs associated with this training or support, if any.

### **Customer Support:**

Upon award, proposer shall provide customer support to the Designated Administrator and end users as reasonably necessary. List the name, title, office address, telephone number, fax number, and e-mail address (if available) of the person(s) who will provide the services required hereunder. Information regarding general personnel (e.g. individual help desk operators need not be provided). This support shall include at a minimum:

- The name, title, e-mail address and telephone number of the customer account representative and alternate who would respond to inquiries by the Designated Administrator or agent.
- The name, title, e-mail address and telephone number of the technical representative and alternate who would respond to inquiries by the Designated Administrator or their agent.

### **Changes in Contact Accounts:**

The Designated Administrator or agent may request changes to a District individual account. Such changes may include additional or deletion of departmental account details, modifications to informational reports, additional controls or restrictions, and other information which could be of assistance in providing comprehensive analysis of labor activities. These changes may be made in writing, on-line (email or web access), or orally with written, fax or electronic mail confirmation follow-up within five (5) business days.

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## SPECIFICATION F- Requirements

### Customized Report Creation

#### Bid Requirements:

#### Customized Report Creation:

##### Purpose and functionality:

District is soliciting proposals to provide hourly unit pricing for new report customization and/or existing report customization to the various aforementioned packages that are part of this bid.

#### Report Customization Sample Scope:

Proposer shall provide an hourly rate to create reports, a typical request being as follows:

- Need a report that displays a group of employees based on their department, displaying the quantity of work assigned each, with a percentage of workload by the grouped department name allocated to each.

##### Technical Requirements:

Resulting software must fully integrate with existing product with no new plug-in or stand-alone requirement. It shall become part of the existing cloud based program and function within its framework.

##### Approval:

Any customized report request shall come exclusively from a manager level District representative and shall not commence in any way without a purchase order in place.

#### Training:

The Proposer shall provide completion notification and access training to district staff upon completion.

#### Customer Support:

Upon award, proposer shall provide customer support to the Designated Administrator and end users as reasonably necessary.

- A list of the name, title, office address, telephone number, fax number, and e-mail address (if available) of the person(s) who will provide the services required hereunder.

## **ANCILLARY SERVICES**

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Information regarding general personnel (e.g. individual help desk operators need not be provided). This support shall include at a minimum:

- The name, title, e-mail address and telephone number of the customer account representative and alternate who would respond to inquiries by the Designated Administrator or agent.
- The name, title, e-mail address and telephone number of the technical representative and alternate who would respond to inquiries by the Designated Administrator or their agent.

### **Changes in Contact Accounts:**

The Designated Administrator or agent may request changes to a District individual account. Such changes may include additional or deletion of departmental account details, modifications to informational reports, additional controls or restrictions, and other information which could be of assistance in providing comprehensive analysis of labor activities. These changes may be made in writing, on-line (email or web access), or orally with written, fax or electronic mail confirmation follow-up within five (5) business days.

[END OF SECTION]

# ANCILLARY SERVICES

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## SPECIFICATION G- Requirements

### System Integration to Existing Software

#### Bid Requirements:

#### System Integration to Existing Software Features:

##### Purpose and functionality:

District is soliciting proposals to provide hourly unit pricing to integrate the various aforementioned packages that are part of this bid with existing district systems via service creation. Scope is to create a service that on a pre-determined agreed upon schedule will upload/download a CSV(comma separated value) document containing agreed upon primary key values to correlate data sets between systems. Service will provide functionality such as insert, delete, and update.

##### Approval:

Any integration scope shall come exclusively from a manager level District representative and shall not commence in any way without a purchase order in place.

#### Training:

The Proposer shall provide completion notification and access training to district staff upon completion.

#### Customer Support:

Upon award, proposer shall provide customer support to the Designated Administrator and end users as reasonably necessary.

- List the name, title, office address, telephone number, fax number, and e-mail address (if available) of the person(s) who will provide the services required hereunder.

Information regarding general personnel (e.g. individual help desk operators need not be provided). This support shall include at a minimum:

- The name, title, e-mail address and telephone number of the customer account representative and alternate who would respond to inquiries by the Designated Administrator or agent.

## ANCILLARY SERVICES

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- The name, title, e-mail address and telephone number of the technical representative and alternate who would respond to inquiries by the Designated Administrator or their agent.
- The name, title, e-mail address and telephone number of the technical representative and alternate who would respond to inquiries by the Designated Administrator or their agent.

### **Changes in Contact Accounts:**

The Designated Administrator or agent may request changes to a District individual account. Such changes may include additional or deletion of departmental account details, modifications to informational reports, additional controls or restrictions, and other information which could be of assistance in providing comprehensive analysis of labor activities. These changes may be made in writing, on-line (email or web access), or orally with written, fax or electronic mail confirmation follow-up within five (5) business days.

[END OF SECTION]

# ANCILLARY SERVICES

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## SPECIFICATION H- Requirements

### Facility Inventory Auditing Services

#### Bid Requirements:

#### Facility Inventory-Auditing Assessment Service:

##### Overview:

District is seeking proposals to perform labor services to conduct inventory of District assets and/or provide facility assessment services to determine status of facility and/or asset condition. A system is not required, this proposal is for services to provide labor and resulting reporting under general direction of District utilizing District provided methods.

#### General Proposal Requirements:

Proposer shall bid a rate that is per square foot for services rendered for inspection and/or data collection services, with the base fee charge to provide minimum reporting outcomes per audit/assessment as follows:

Base Fee to include:

- An estimated work plan with hours budget and schedule.
- A resulting detailed report log of inspection activities to include:
  - date, time;
  - the item(s) audited or location inspected;
  - details as to data-points or evaluation metric(s);
  - Proposer's data collection;
  - staff member identification;
  - condition result or evaluation affirmation;
  - summary findings report detailing results.
  - any preparation and staging costs per audit.
- 

Proposer shall include in Base Fee:

- 2,000.00 requisite hardware contingency to support necessary equipment for four (4) staff members to conduct inventory; and
- A contingency fee to cover materials for inspectors such as tablet, bar code reader, and supplies.

## **ANCILLARY SERVICES**

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Inspector materials would be considered District Property and returned to District at conclusion of audit.

### Data and Data Collection:

Proposer shall provide labor to achieve scope as determined by District at time of audit scope creation to achieve District objectives. District will direct at time of scope development the method, inspection points, any scheduling limitations (i.e. audit may be required on evenings or weekends) and will direct or provide District equipment (e.g. a bar code reader or tablet) as necessary to perform duties. All data collection and data collection devices, methods, forms, or intellectual property of District shall be returned to District at conclusion.

### Scheduling:

The District may require audits to be conducted after hours, weekends, or student free days. All scheduling will be determined at time of scope creation.

### Method and Staff Capability:

Typical inspections will be conducted in person by individuals able to skillfully operate technology utilizing electronic equipment and or software; read and work from blue prints, schematics and technical manuals; perform minor manual labor; lift, carry, push and pull heavy objects; work at heights or in confined spaces; bend, stoop, squat, twist, reach and grasp; understand and carry out oral and written instructions; communicate effectively; establish and maintain cooperative working relationships.

### Sale of Client or User Information:

The Proposer shall not sell, rent or otherwise distribute a list of participating users, their addresses or any other information to any person, firm or other entity for any purpose.

### **Customer Support:**

Upon award, Proposer shall provide customer support to the Designated Administrator and end users as reasonably necessary.

- A list of the name, title, office address, telephone number, fax number, and e-mail address (if available) of the person(s) who will provide the services required hereunder.

Information regarding general personnel (e.g. individual help desk operators need not be provided}. This support shall include at a minimum:

- The name, title, e-mail address and telephone number of the customer account representative and alternate who would respond to inquiries by the Designated Administrator or agent;

## ANCILLARY SERVICES

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- The name, title, e-mail address and telephone number of the technical representative and alternate who would respond to inquiries by the Designated Administrator or their agent.

### **Changes in Contact Accounts:**

The Designated Administrator or agent may request changes to a District individual account. Such changes may include additional or deletion of departmental account details, modifications to informational reports, additional controls or restrictions, and other information which could be of assistance in providing comprehensive analysis of labor activities. These changes may be made in writing, on-line (email or web access}, or orally with written, fax or electronic mail confirmation follow-up within five (5} business days.

[END OF SECTION]

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# ANCILLARY SERVICES

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## SPECIFICATION I - Requirements

### Use of Facilities Scheduling and Invoicing Software

#### Bid Requirements:

#### Use of Facility Scheduling and Invoicing Software Features:

##### System capabilities and functionality:

Software must address, but not be limited to, the concepts of use of facilities scheduling and invoicing in the context of the Civic Center Act and SB 1404 with regards to school district use of facility billing.

##### User Restrictions:

The systems shall have the ability to set restrictions and controls at appropriate levels including the designation of internal versus external users (i.e. set up new users, terminate or cancel users, change or modify user limits, change passwords, etc.). The Proposer's software shall have the capability to allow end user to create their own user accounts that a designated District administrator can approve and make changes. The District system administrator shall be able to restrict and control individual accounts, within certain defined limits. The Designated Administrator shall also have the ability to activate certain accounts which may be reserved for emergency or temporary use.

##### Use Approvals:

System shall utilize an unrestricted approval system allowing for one to many approvers per spaces and per properties. End-user reservations should result in system generated emails to the various configurable approvers, with approval screens and abilities for school site staff to deny use or manage time of use conflicts.

##### Real Time Quotes:

System shall provide end users with real time pricing upon submission of request based on District published Fee schedule.

##### Reports:

System shall provide reports that show user reservations with detailed information including daily, weekly, monthly and yearly transaction detail by property and space utilized. Summary reports shall also be produced and must be capable of showing transactions by property, end-user group, including cost/revenue.

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### **Technical Requirements:**

Software must support the environment and functions described below. No other solutions will be considered as qualifying proposals:

- The server database platform shall be Microsoft SQL compatible.
- The system architecture must support the TCP/IP network protocol for use with all major web browser interfaces.
- The system must be able to send e-mails from within the application utilizing standard SMTP POP 3 protocol.

System should fulfill all requirements "out-of-the-box" without changes or modifications to underlying tables, structures, or codes.

### Sale of Client or User Information:

The Proposer shall not sell, rent or otherwise distribute a list of participating users, their addresses or any other information to any person, firm or other entity for any purpose.

### **Training:**

The Proposer shall provide training to Purchasing Entities as follows:

#### Contract Start-Up Training Session:

At the start of the contract, the Proposer shall provide initial on-site training to key staff designated by the public agency client. The initial training will address benefits and features of software system, utilization and operational procedures, available reports, and any other feature associated with the program(s).

#### Training Materials:

Proposer shall provide electronic printable materials that may be used by school district staff to train responsible employees and individual users in the proper use of the system. Proposer will provide electronic additional copies of training materials, as required to effectively use the system, at no additional cost. Regular updates and informational reports shall also be made available to authorized users. Authorized school district staff may copy and distribute Proposer-provided materials to staff at no extra cost.

#### Telephone Support:

Proposer shall provide the name, e-mail address and telephone number of a point-of-contact who will be available by telephone and e-mail to answer questions that may arise during training of staff or to provide brief training sessions in person or by telephone to new Program Coordinators or other approved individuals. Proposers shall describe the hours this support will be available and any associated costs. All help desk activities shall be available during normal California school business hours and the operations of the help desk must be located in the United States of America.

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### **Additional Training Programs:**

Proposers shall describe any additional training programs, videos, printed materials, or other aids that may be available and make these items available for use upon request and the costs associated with this training or support, if any.

### **Customer Support:**

Upon award, Proposer shall provide customer support to the Designated Administrator and end users as reasonably necessary:

- A list of the name, title, office address, telephone number, fax number, and e-mail address (if available) of the person(s) who will provide the services required hereunder.

Information regarding general personnel (e.g. individual help desk operators need not be provided). This support shall include at a minimum:

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[END OF SECTION]

PRICING MATRIX

Item No	NAICS Codes	SIC Code(s)	Schedule of Supplies/Services	Description	Specification	Base Setup Fee	UOM	Unit Cost	Price
	511210 - Software Publishers	7372 packaged software	Work order management software	Subscription to web based computerized maintenance management system	A	\$ 6,000.00	Per 500 students	\$ 90.00	\$ 90.00
	511210 - Software Publishers	7372 packaged software	Electronic Facility Inspection System (e-FIT); fka Mobile work order management application	Subscription to web based mobile device computerized maintenance management system	B	\$ 5,000.00	Per 500 students	\$ 60.00	\$ 60.00
	511210 - Software Publishers	7372 packaged software	Asset Tracking software	Subscription to web based asset tracking and management system	C	\$ 3,500.00	Per 500 students	\$ 90.00	\$ 90.00
	511210 - Software Publishers	7372 packaged software	Technical Support desk management software	Subscription to web based technology desk management system	D	\$ 6,000.00	Per 500 students	\$ 90.00	\$ 90.00
	511210 - Software Publishers	7372 packaged software	Fire & Life safety inspection management software	Subscription to web based fire & life safety equipment management system	E	\$ 6,000.00	Per 500 students	\$ 90.00	\$ 90.00
	511210 - Software Publishers	7374 Computer processing and data preparation and preprocessing services	Customized reports	Creating a customized report for any existing product suite	F	\$ 250.00	Per report	\$ 250.00	\$ 250.00
	511210 - Software Publishers	7374 Computer processing and data preparation and preprocessing services	System Integration (accounting/ purchasing systems)	Software service creation for integration to existing accounting, purchasing, or related systems	G	\$ 4,500.00	Per integration	\$ 1,875.00	\$ 1,875.00
	541614 - Process, Physical Distribution, and logistics Consulting Services	7374 Computer processing and data preparation and preprocessing services	Facility Inventory auditing assessment, inspection, with summary report of results	Provide inspection grade facility assessment, inspection, with summary report of results	H	\$ 7,500.00	Per square foot	\$ 0.12	\$ 0.12
	511210 - Software Publishers	7372 pre packaged software	Subscription to web based use of facility management system	Subscription to web based use of facility management system	I	\$ 9,600.00	Per 500 students	\$ 125.00	\$ 125.00

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# ANCILLARY SERVICES

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## SPECIFICATIONS DESIGN

### Consultant Services

#### **Interior Finishes & Specifications Facilities, Operations and Maintenance Modernization Projects**

#### **Instructions to Bidders:**

Bidder shall have the following capabilities and/or experience:

- Require at least a bachelor's degree in design preferred, but will accept one in another is acceptable as long as it's accompanied by coursework in interior design
- 15+ years of experience in the commercial interior design industry and specifying finishes and furniture for the commercial environment
- 15+ years of experience working with school and government agency projects and provide references from previous projects
- 15+ years of experience in selecting interior finishes and writing specifications for schools and government agencies
- Involved with commercial interior design associations such as IIDA, AIA-Interior Architecture and IFMA or up to date trends in design to include surface finishes, textiles and furniture
- Regularly attends interior design and education conference/trade shows for information on the latest in trends in interior design for K-12 and higher education spaces such as NeoCon, CASH, CASBO and APPA.
- " 15+ years of experience and understanding of facility operations, maintenance and construction projects
- Experience in verbal communication and in written form and able to write reports and giving presentations to various types of end users and administrative levels

Bidders shall formulate a strategy for implementing design consultant services for the Owner (District). Scope shall cover initial meeting with Owner to identify interior finish needs and tour of existing space, address expectations of outcome to include budget, time frame, aesthetic and delivery methods, presentation of selections for review and approval and determination of communication of selected finishes such as specifications and color boards.

Recommendations shall be segregated into 3 separate categories for tabulation on the Bid Price Sheet as follows:

Design Phases:

- Programming
- Schematic Design
- Documentation/Specifications/Final Selection
- Construction Administration

Follow through must be done with maintenance and operations staff after installation, reinforcing, training and educating them of the new cleaning methods of specified materials. Staff, students and parents must be educated on the benefits of a healthy, environmentally sound design on a regular basis.

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### **Programming**

Project first with the Owner (District) during the initial meeting. Define the scope and expected outcome of the project and does it meet functional and aesthetic needs as well as meet enhancing productivity and safety. Determine the schedule and the budget and whether a specialized consultant is needed. Address problem areas or areas of focus. Several meetings might be needed during this process to meet with key occupants of the space and gather data and inventory of existing space. Development of a preliminary program will be created in preparation of a final approval by Owner (District).

Definitions need to be developed, processes defined, with possible policies and procedures, standards and specifications written, bid development and review. Finish products that need to be specified for the space will be determined. Products could include but are not limited to flooring surfaces and paint. Product review, evaluation and testing may be necessary to fully vet products and determine levels of incorporation into the policies.

### **Schematic Design/Design Development**

Bidders must describe the process for scoping the parameters of the compiling (3) finish palettes based on previous information compiled from the initial meetings and programming outcomes. The palettes must include all finishes along with performance specifications for the Owner (District) review. Once all palettes, finishes and specifications are reviewed, the Owner (District) will review and approve (1) palette for final selection and package.

Based on scope of the contract, policies and procedures (may be written), standards and specifications developed, bids developed and reviewed. Program evaluation and end user training and education may apply to some initiatives.

### **Documentation/Specifications/Final Selection**

Bidders must describe the process of the parameters of the final selection of finishes and communicated through color boards and written specifications.

Several design packages will be developed based on scope of work and specific areas based on function, performance and aesthetics to include but not limited to the-finishes below:

### **BASIC PACKAGE:**

Item DS1

Classrooms and or similar areas

#### **Flooring selections:**

##### **Soft surface:**

Hybrid resilient, broadloom and modular tile

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### Hard surface:

VCT, LVT, linoleum, rubber and ceramic

### Wall base:

Cove, straight or self-based

### Paint selections:

Eggshell or semi-gloss

## **DESIGN PACKAGE:**

Item DS2

Public Spaces, Lounge or lobby areas, corridors, library, auditorium, multi-purpose rooms, student services and bookstores

### Administrative Areas:

Administrative department, business services, housing services

### Flooring selections:

#### Soft Surface:

Specialty design options to include accent carpets, custom area rugs, specialty logo graphics and way-finding design.

#### Hard surface:

Stained concrete, granite, stone, terrazzo, logo graphics

#### Wall base:

If needed

#### Paint Selections:

Eggshell or semi-gloss

## **ALA-CARTE PACKAGE**

Item DS3

Classrooms, Public Spaces and Administrative Areas:

Specification of product(s) unique to space not permanently adhered or attached to the space to include:

- Furniture/Accessories
- Artwork
- Graphics/Signage
- Specialty Lighting
- Window Coverings



# PRICING MATRIX

Item No	NAICS Codes	SIC Code(s)	Schedule of Supplies/Services	Description	Specification	Base Setup Fee	UOM	Price
DS1	IDB48-DS1 Basic Package	DB1959-DS1	Basic Design Package	Classrooms and or similar areas to include flooring and paint selections	DS1	\$ 200.00	daily service rate + travel and per diem if required	\$850.00 per day
DS2	IDB48-DS2 Design Package	DB1959-DS2	Design Package	Design package to include lounge, lobby areas, corridors, library, auditorium, multi-purpose room, student services and book stores. Administrative areas, business services and housing services.	DS2	\$ 200.00	daily service rate + travel and per diem if required	\$850.00 per day
DS3	IDB48-DS3 A La Carte Package	DB1959-DS3	A La Carte Design Package	Singular design projects for specific places to include classrooms, public spaces, administration areas, etc. Design work to include furniture and accessories, art work, graphics and signage, specialty lighting and window covering.	DS3	\$ 200.00	daily service rate + travel and per diem if required	\$850.00 per day

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## **SPECIFICATION PRS-Requirements**

### **Management Professional Services**

#### **Construction Plans Review Construction Specification(s) Review Forensic Technical Review & Auditing**

#### **Items # PRS-001 through PRS-003**

#### **Instructions to Bidders:**

Bidder shall formulate a strategy for review of technical data that is obtained from professional services providers such as architects and/or engineers that the Owner (District) retains for design, planning, engineering or for construction related services of its facilities or infrastructure such as classroom buildings, warehouses, offices, performing arts complexes or other buildings or structures that are utilized by the District. Design or construction related services of its facilities or infrastructure may be for a single building or for multiple buildings or for an all-inclusive educational site. Within the strategy, Bidder shall provide what will be performed in the review of technical data and provide pricing for said review. Reviews shall be segregated into three separate categories for tabulation on the Bid Price Sheet as follows:

- Construction Plan Review (PRS-1)
- Construction Specification Review (PRS-2)
- Forensic Technical Review & Auditing (PRS-3)

Bidders are to understand the challenges that are faced by the District, which is described in the Overview of Technical Challenges below. Bidders shall utilize the technical challenges for formulation of the bid items (PRS-1, PRS-2 and PRS-3).

#### **Overview of Technical Challenges-for Formulation of Bid Items**

The Total Cost of Ownership (TCO) on capital projects begins with proper planning prior to the beginning of the project. This entails having project needs fully identified in order to achieve the desired outcome. Facilities needs and educational expectations are critical for effective project planning and should be focused on student learning objectives (SLO). As capital projects are long term investments, planning should not be discounted and identifying all of the needs and expectations for an investment that will cover several years, or even decades, can be challenging. Throughout the design process, the design team should be fully engaged with the institution's needs and desired outcomes as the design documents (plans and specifications) will translate these needs into the built product. As such, the plans and specifications are essentially the quality control vehicle of the process that communicates to the construction team that which will be the built product. The construction documents are formulated by a cadre of professionals including architects, engineers, technicians, specialists, writers, product consultants and clerical personnel. Throughout this enormous development of data and drawings there is a grandiose need for coordination among team members and, likewise, there is a multitude of opportunities where

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Errors may occur. All of this development affects the total cost of ownership in a myriad of ways. Upon finalizing construction document development, the process leads to the implementation phase of capital projects wherein the project documents become the contract documents that are utilized and implemented by the construction team. Should the construction team be given contract documents that are not clear, collect, concise and complete, the project will suffer in one way or another, whether it be in cost escalation, time delays, poor quality of work or a combination thereof. Nonetheless, such deficiencies overwhelmingly affect the total cost of ownership and inevitably, deficiencies affect student learning objectives and student success.

Quality control of the design phase should involve a thorough review and audit of the construction documents inclusive of the plans and specifications. This type of audit is not the same as plan review that is performed by the authority having jurisdiction (AHJ) such as that of the Division of the State Architect (DSA). While an AHJ focuses on minimum code standards including structural, fire and life safety, and access compliance, this does not include auditing for clear, collect, concise and complete document. Auditing of the construction documents bridges the gap by performing this task and reinforcing that coordination among disciplines leads to better communication of the design elements to the construction team, therein bringing more value to the owner and a better return to the total cost of ownership. Resultantly, better student achievement is reinforced by way of securing the design objectives with the student learning objectives.

### **1. Construction Plan Review Features:**

Bidder shall describe the process for reviewing the construction plans and provide a description of what will be provided by Bidder within the technical review of the construction plans. Bidder shall note what format is required of the District by the Bidder for review of the plans.

Reports: Bidder shall provide a report that outlines the findings and corrective actions.

### **2. Construction Specification(s) Review Features:**

Bidder shall describe the process for reviewing the construction specifications and provide a description of what will be provided by Bidder within the technical review of the specifications. Bidder shall note what format is required of the District by the Bidder for review of the specifications.

Reports: Bidder shall provide a report that outlines the findings and corrective actions.

### **3. Forensic Technical Review & Auditing Features:**

Bidder shall describe the process for performing a forensic review or audit of a project or projects and provide a description of what will be provided by Bidder within the forensic review or audit. Bidder shall note what format is required of the District by the Bidder for performing the forensic audit.

Reports: Bidder shall provide a report that outlines the findings and corrective actions.

[END OF SECTION]

PRICING MATRIX

Item No	NAICS Codes	SIC Code(s)	Schedule of Supplies/Services	Description	Specification	Base Setup Fee	UOM	Price
PRS-001	54161 Management Consulting Services	18742 Management Consulting Services	Construction Plan Review	Construction plan review consists of reviewing the design plan for coordination among elements inclusive of the architectural drawings, mechanical drawings, structural drawings, electrical drawings, civil drawings, landscape drawings, or other elements that are included within the plan(s) package for a specific project. Said review encompasses verifying that the documents are reasonably complete for construction of the project by a qualified contractor within the acceptable standard of care. Review is based upon the hard copy format set of plans. Post review, a report will be developed that outlines any findings and suggested corrective measures for each respective specific finding, which will lead to a more complete and concise set of drawings therein minimizing communication issues and conflicts between the design team and the construction team.	PRS	\$ 312.50	per page + reimbursables if required	\$ 118.75
PRS-002	54161 Management Consulting Services	18742 Management Consulting Services	Construction Specification Review	Construction specification review consists of reviewing the technical specifications that are derived by the design team and reviewing the District front-end documents for coordination among elements inclusive of verifying that the documents for coordinate among each other seamlessly and that they are reasonably complete and concise for construction of the project by a qualified contractor within the acceptable standard of care. Review is based upon the hard copy format set of documents. Post review, a report will be developed that outlines any findings and suggested corrective measures for each respective specific finding, which will lead to a more complete and concise set of documents therein minimizing communication issues and conflicts between the design team and the construction team.	PRS	\$ 312.50	per page + reimbursables if required	\$ 31.25
PRS-003	54161 Management Consulting Services	18742 Management Consulting Services	Forensic Technical Review & Auditing	Forensic technical review & auditing consists of reviewing technical data, plans, specifications, reports, documents, etc. Regarding a project or outcome that has not otherwise been delivered favorably or that the District requires input on. This could be for a project that has not been delivered yet or for a project that has already been constructed. Forensic review may even be for a specific portion of a project, should it be requested. Review consists of analyzing the data, evaluating whether the data is clear, correct concise and complete and determining where any shortfalls occurred and possibly why they occurred. Review is based upon the hard copy format set of documents. Post review, a report will be developed that outlines any findings and suggested corrective measures for each respective specific finding. The report will be formatted in that of a professional paper wherein the following are inclusive: Executive Summary; Methods of Analysis; Findings; Conclusions; Recommendations; Limitations of the Report; Exhibits.	PRS	\$ 312.50	per page + reimbursables if required	\$ 187.50

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## **SPECIFICATON PNA REQUIREMENTS**

### **Program Needs Assessment**

#### **District Liaison New Construction Modernization/Facility Planning Fixtures, Furniture and Equipment <FFE> Standards**

#### **Items #PNA 001-PNA-002**

#### **Introduction to Bidders:**

Bidder shall have the following capabilities and/or experience:

- Significant experience in conducting projects with school and government agencies;
- More than 25 years of experience in working in the area of Fixtures, Furniture and Equipment (FFE) with school agencies;
- Significant experience in school programs and programmatic site assessments;
- More than 25 years of experience in procurement, bidding and writing specifications for schools and government agencies;
- Significant experience in school and government policy and procedure development;
- Significant experience and understanding of facility operations, maintenance and construction programs, budgets and funding sources;
- Significant experience working with site staff, administration, community and architects in planning school modernization or new construction programs;
- Significant experience in guiding and leading District staff and community in developing strategies and programmatic needs for classroom design and school programs for interface with District leadership or design teams;
- Significant experience in writing reports, oral communication and public speaking to various types of end users and administrative levels;
- Significant experience in working with District staff and design teams in procurement, researching in the development of standards and specifications for a minimum of million dollar FFE budgets at both elementary and secondary school levels;
- Experience in FFE specification and standard development for specialty areas such as libraries, science labs, special needs and child development programs;
- Significant experience in working with student and teaching staff in the development of goal setting, understanding of various educational programs and experience in the training of facility staff;
- Experience with sustainable standards, LEED credentials, CHPS and other environmental concerns preferable;
- Experience in public and community outreach.

Bidders shall formulate a strategy for implementing Program Needs Assessment for the Owner (District) Scope shall be for liaison services for the District, acting as the Owners representative, to articulate program needs and requirements for new construction, modernization or facility planning from the end users prospective. Qualified proposals shall show an understanding of various programs within the District such as libraries, Special Needs (IS, Life Skills etc.), Child development Services, Food Services etc. Meetings shall be with school or department staff to determine program needs for

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facility planning documentation. Services will include meeting with architectural teams and District planning staff to assure end users' needs are met or reviewed prior to schematic design and program implementation.

Within the strategy, Bidder shall outline performance categories and pricing for each category for tabulation on the Bid Price Sheet as follows:

- District Liaison New Construction/Modernization/Facility Planning (PNA-001)
- Fixture/furniture and Equipment (FFE) Standard Development, Oversight and Implementation (PNA-002)
- Bidders are to show an understanding of the technical challenges that are faced by the District as outlined below. Bidders shall utilize the technical challenges for formulation of the bid items (PNA-001, and PNA-002).

### **Overview of Technical Challenges for Formulation of Bid Items**

District school site employees and department directors are educators and as such have their focus on the students and curriculum. They do not speak the language of designers, architects and Program Managers. As such, there is a need for a person who speaks both languages, with the ability to articulate to both sides: what programmatic needs are from a site or departmental perspective and the ability to ask the correct questions for the specific area of review, and then be able to discuss these needs to facility, construction, architectural or other District consultants. Far too often, site staff thinks they have told "District" and design staff what they want or need, only to find out at time of occupation that these programmatic needs have not been met.

Furniture, Fixtures and Equipment (FFE) is similar to the above, in that the end user has specific needs to teach, or operate a department, and each requires specific equipment or furniture to function efficiently and safely. In addition, Maintenance and Operations staff need to be heard to incorporate their needs and abilities in order to keep equipment, furnishings and fixtures at optimal operational condition. An understanding of the unique needs of secondary, elementary, libraries, science labs, Child Care and Special Ed facilities all have specific needs and functions within the organization and an individual or individuals with a clear understanding of these programs is essential in order to assure that expectations, budgets and timelines are met.

#### **1. District Liaison New Construction/Modernization/Facility Planning**

Minimum qualifications will include experience and understanding of elementary, secondary, early child hood and other school- based programs, ability and experience in working with design and facility staff in construction and modernization programs with an understanding of timelines, terms and processes of the industry to integrate their requirements with end user needs to define and assure a successful project for the Owner. Ability to act as the Districts liaison through site, District, community and other stakeholder meetings to define programmatic needs of end user. Ability to guide, lead and direct stakeholders in defining goals and standards for the intended program and hand off to design professionals for execution. Ability to review standards and specifications with architectural team and other



## ANCILLARY SERVICES

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professionals to meet program goals, sustainable standards, Maintenance, Operations and facility staff needs as appropriate.

### **2. Fixture/furniture and Equipment (FFE) Standard Development, Oversight and Implementation (PNA-002)**

Minimum qualifications shall include ability to and experience in writing specifications, standards and bid packages as required. Experience in working with schools to define FFE for specific programmatic needs in early child hood, Special Ed, elementary and secondary facilities. Experience in researching markets for new and innovative materials, equipment and furnishings, understanding of child safety and code requirements in design. Understanding of facility maintenance and operations abilities as they relate to maintaining furnishings in the classroom environment. Ability to recommend finishes and colors when necessary. Ability to coordinate deliveries, installation and layouts when required. Ability to work with District staff and consultants in presenting materials and solutions to a varied group of stakeholders. Understanding of school budgets, calendars and construction schedules.

[END OF SECTION]

## ANCILLARY SERVICES

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[END OF SECTION]

# PRICING MATRIX

Item No	NAICS Codes	SIC Code(s)	Schedule of Supplier/Services	Description	Specification	Base Setup Fee	UOM	Price
PNA-001	54161 Management Consulting Services	8742 Management Consulting Services	District Liaison New Construction/Modernization/Facility Planning	Minimum qualifications will include experience and understanding of elementary, secondary, early child hood and other school based programs, ability and experience in working with design and facility staff in construction and modernization programs with an understanding of timelines, terms and processes of the industry to integrate their requirements with end users needs to define and assure a successful project for the owner. Ability to act as the Districts liaison through site, district, community and other stakeholder meetings to define programmatic needs of end user. Ability to guide, lead and direct stakeholders in defining goals and standards for the intended program and hand off to design professionals for execution. Ability to review standards and specifications, with architectural team to meet program goals, sustainable standards, maintenance, operations and facility staff needs as appropriate.	PNA	None	daily service rate + travel and per diem \$ if required	800.00
PNA-002	54161 Management Consulting Services	8742 Management Consulting Services	Fixture/furniture and Equipment (FFE) Standard development, Oversight and Implementation (PNA-002)	Minimum qualifications shall include ability to and experience in writing specifications, standards and bid packages as required Experience in working with schools to define FFE for specific programmatic needs in early child hood, Special Ed, elementary and secondary facilities. Experience in researching markets for new and innovative materials, equipment and furnishings, understanding of child safety and code requirements in design. Understanding of facility maintenance and operations abilities as they relate to maintaining furnishings in the classroom environment. Ability to recommend finishes and colors when necessary. Ability to coordinate deliveries, installation and layouts when required. Ability to work with district staff and consultants in presenting materials and solutions to a varied group of stakeholders. Understanding of school budgets, calendars and construction schedules	PNA	None	daily service rate + travel and per diem \$ if required	800.00

## ANCILLARY SERVICES

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# ANCILLARY SERVICES

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## **SPECIFICATION REQUIREMENTS**

### **Management Professional Services**

#### **Synthetic Turf Alternatives Analysis**

#### **Alternative Floor Cleaning and Flooring Analysis**

#### **Introduction to Bidders:**

Bidder shall have the following capabilities and/or experience:

- Ph.D. in chemical physics or directly comparable discipline
- More than 25 years of experience in evaluating/analyzing safer alternatives
- Significant expertise and experience in identifying, developing, testing and demonstrating solvent alternatives
- Experience in working with/analyzing/evaluating alternatives in cleaning, coatings, adhesives and stripping
- Familiarity with air, water, wastewater, hazardous waste and worker exposure regulations in California and at the Federal level
- Extensive experience in engineering cost analysis
- Significant experience in conducting projects with government agencies
- More than 25 years of experience in writing technical reports and articles
- More than 25 years of experience in giving presentations and preparing outreach materials

#### **Overview of Technical Challenges-for Formulation of Bid Items (ENV-1)**

This specification addresses two categories of bid items. Each of these is discussed below.

#### **1. Synthetic Turf Alternatives**

Synthetic turf, and particularly the infill material, crumb rubber, is coming under increasing scrutiny concern that it is causing adverse health outcomes for athletes and the communities surrounding turf fields. Government agencies at the Federal level and in California are conducting projects to identify releases that may be occurring from infill and whether those releases are leading to adverse human health effects. The synthetic turf industry is interested in identifying, modifying, testing and estimating the costs of using safer alternatives to crumb rubber in the event it is determined that adverse health effects are demonstrated. The industry is interested in using safer alternatives in new synthetic turf installations and in treating or modifying the crumb rubber infill in existing installations.

The bidder will investigate alternatives to crumb rubber including but not limited to:

- Virgin rubber
- Synthetic rub
- Combinations of virgin and synthetic rubber

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- Cork
- Natural grass
- Foam materials

The bidder will also investigate methods of modifying the alternatives listed above to increase the performance and/or minimize the cost of using them. The bidder will also investigate methods of preventing release of toxic materials from crumb rubber in the event that such materials are being released. These approaches might involve but would not be limited to:

- Applying impervious coatings or other materials to the surface;
  - Modifying the crumb rubber or the crumb rubber surface to prevent or minimize releases
- the bidder will prepare reports summarizing the results of the analysis.

### **2. Floor Cleaners and Strippers and Alternative Flooring Approaches for Schools (ENV-2)**

Bidder shall provide analysis of existing floor cleaners and will identify and evaluate safer alternative floor cleaners. Bidder shall also evaluate and compare the costs of using the alternative cleaners in place of existing cleaners

Bidder shall develop case studies for schools that have converted to safer alternative floor wax strippers for vinyl composition tile (VCT), applied coatings to VCT or converted to alternative types of flooring that do not require waxing and stripping. Bidder will analyze and compare the cost of using the original VCT and using coatings over VCT or using alternative flooring. Bidder will write reports summarizing the results of the analysis.

Bidder shall provide services that include giving presentations on safer alternatives to floor wax strippers used today and other activities as needed.

[END OF SECTION]

# PRICING MATRIX

Item No	NAICS Codes	SIC Code(s)	Schedule of Supplies/Services	Description	Specification	Base Setup Fee	UOM	Price
ENV-1	54161 Management Consulting Services	8742 Management Consulting Services	Synthetic turf crumb rubber alternatives	Synthetic turf crumb rubber alternatives will be investigated, analyzed, tested and evaluated. Alternatives that will be candidates include virgin rubber, synthetic rubber, cork, natural grass and foam materials and combinations. Another approach would involve investigating and testing the application of coatings or other impervious materials to the surface of the crumb rubber. This approach includes investigating and testing modifications to the surface of the crumb rubber to prevent releases. Bidder will prepare a report summarizing the results of the analysis and testing.	ENV	None	daily service rate + travel and per diem if required	\$ 3,500.00
ENV-2	54161 Management Consulting Services	8742 Management Consulting Services	Floor cleaners, strippers and alternative flooring approaches	Existing floor cleaners and floor wax strippers will be examined to determine if they contain ingredients that could damage health and the environment. Alternative cleaners and strippers will be identified that could substitute for existing products. Bidder will analyze and compare the cost of the existing materials and alternatives and prepare a report on the results. Case studies for schools that have converted to safer alternative cleaners or strippers or adopted coatings or alternative flooring will be prepared. Such case studies will include comparison of the advantages and disadvantages of original and alternative methods and the cost. Bidder will prepare stand-alone case studies summarizing the results of the analysis. Bidder shall also provide services that include giving presentations on safer alternatives to floor wax strippers used today as needed.	ENV	None	daily service rate + travel and per diem if required	\$ 3,500.00

## ANCILLARY SERVICES

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## **ANCILLARY SERVICES**

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### **ARCHITECTURAL SERVICES**

#### **SCOPE OF WORK**

Architects performed a wide variety of services on behalf of clients depending on the needs of each client. Each school district we encounter has its own set of expertise and limitations. It's our job as architects to adjust to the needs of each client.

Architects lead a diverse team of consultants tailors to the specific requirements of each project. The architect's role is analogous to the orchestra leader in a symphony. The orchestra leader doesn't play the instruments better than the consultants, but knows how each one is supposed to sound. In the same way, the architect leads the consultants toward a common goal to provide the best possible project for the client.

Architects bring different kinds of value to the project at each phase. During the schematic design phase, the architect's primary value to the client is his ability to customize the project design to exactly fit the vision for how the school district intends to educate their children. The key to doing this is partnering with the client and developing a relationship to learn about their vision.

During the design development phase, the design is moving from basic layouts and aesthetics to the investigation of systems such as structural, plumbing, mechanical, lighting systems. At this point, it's crucial that the District provide input to ensure that the design coordinates with the maintenance standards developed by the District.

Once this phase is complete, the architect begins preparing drawings and specifications for bidding and construction. Before bidding and construction can begin, the plans will be reviewed and approved by the Division of the State Architect(DSA). The primary purpose of DSA is to "certify" that the plans comply with all current codes and will be safe for children. Years of experience with DSA shapes the way the drawings and specifications are prepared. There are a number of model codes architects must be familiar including the California Building Code and the American's With Disabilities Act. They must also be at least familiar enough with the Fire, Mechanical, Plumbing and Electrical codes to coordinate with consultants.

During the preparations of drawings, architects will provide a variety of documents including site plans, floor plans, ceiling plans, roof plans, sections, exterior elevations, interior elevations,

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schedules and details. In addition, the architect will include and coordinate the consultant's plans including civil, structural, mechanical, plumbing, electrical and occasionally fire sprinkler design, landscaping and low voltage design.

Reviews by DSA can be either full mail-in reviews or over-the-counter(OTC) approval. We usually try to do OTC reviews when possible to save time. Most approvals for modular classrooms and shade structures are OTC.

Once plans have been approved, then bidding and construction may start. The certification process for DSA continues at this point. DSA has a process now that they call DSA Box which requires architects, inspectors and contractors to certify portions of the construction phase by phase. The "verified reports" are uploaded to DSA Box at the end of each phase for the full duration of construction.

At the end of construction, the closeout portion of the project begins. DSA has another process at this phase called Closeout Box where each group provides the final reports and DSA closes with the project with certification.

[END OF SECTION]

## PRICING MATRIX

ARCHITECTUAL SERVICES		
Staff		Per Hour
Principal		\$ 120.00
Project Architect		\$ 100.00
Job Captain		\$ 85.00
Project Leader II		\$ 70.00
Project Leader I		\$ 50.00
Clerical		\$ 45.00
*Architect shall be paid for professional services equal hours work times hourly rate		

## ANCILLARY SERVICES

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# Calculating School Capacity for Next Generation Learners

## The Importance & Methodology for Right-sizing

### INTRODUCTION

It is important to not only understand the basic terminology of calculating school capacity, but to fully comprehend the various conventions and methodologies utilized by local and state authorities for funding and facilities planning purposes. Demonstrating a mastery for calculating school capacity allows a school district to realize what it takes to plan an educational learning environment (school) that is the right size for its intended enrollment. Furthering the importance of correctly calculating school capacity elements, allows a school district to perceive the characteristics of next generation learning and how these characteristics are transforming the methodologies of school capacity calculations.

### GENERAL DEFINITION

Defining school capacity is simply identifying the number of learners that can be reasonably accommodated by a school, building, and site. There are three specific elements or variables that affect the calculation of school capacity. They are:

- Physical variables (classrooms, auxiliary spaces, support spaces, etc.)
- Operational variables (number of periods, hours, days, etc.)
- Programmatic variables (program driven – aligned with the educational specification)

### CAPACITY VARIABLES

The capacity variables affect the approach you take when identifying how to “right-size” the learning environment. Each variable will produce a different outcome and a different capacity model. Understanding the variables is advantageous and will produce the benefits needed to support next generation teaching and learning.

**Physical Variables** (*can include, brief list appears below*):

- Building size/area
- Number/types of spaces for learning
- Support facilities (kitchen, lunchroom, restrooms, etc.)
- Infrastructure (power, systems, security, etc.)
- Net vs. gross areas
- Building & life-safety codes (occupancy vs. capacity terminology)
- Site amenities (parking, drop-offs, bus area, play areas, etc.)

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**Operational Variables** (*can include, brief list appears below*):

- Utilization rates & efficiency
- Operational policies
- Staffing
- Funding structures
- Teacher/union regulations
- Space management
- Staff & operational budgets
- Specialty program offerings

**Programmatic Variables** (*can include, brief list appears below*):

- Class sizes & staff ratios
- Educational program offerings
- Operational models (teams, academies, etc.)
- Specialty programs
- Schedules
- Partnerships, off-site learning, etc.
- Extended use

## SCHOOL CAPACITY CALCULATION METHODOLOGIES

Identifying and deriving at student capacity levels a school can reasonably accommodate takes some understanding and specialized skills to pinpoint what is truly needed in terms of capacity and utilization – which has not yet been discussed or identified. There are five general practices or methodologies to calculate the capacity of a school/learning environment. They are:

- Maximum capacity: total number of student “seats” (*butts in chairs*) in the school facility
- Building capacity: identifies student “seats” as well as the extent of support facilities
- Functional capacity: identifies the building capacity as well as desired level of schedule flexibility
- Program capacity: identifies demographics, curriculum, and program offerings – (*driven by teaching and learning outcomes rather than tangible square footage perimeters*)
- Temporary capacity: identifies temporary and make-shift facilities – (*capacity for temporary facilities can take into consideration building, functional, and program methodologies*)

## SCHOOL CAPACITY CALCULATION FEES

There are many methodologies applied to determine the appropriate fees associated with the various school capacity calculations. Most approaches are based on time and materials with a multiplier. These approaches are subjective and vary based on level of expertise in the team providing the analysis and reporting.

Another approach and one that is more controllable is based on actual building square footage, school type (elementary, middle, high school, academy, VAPA, steam, Etc.) and unit pricing. This approach is very applicable for the following:

## ANCILLARY SERVICES

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- Maximum capacity
- Building capacity
- Educational Space Adequacy Analysis

A combination of total building square footage, school type, and program components create the pairing for pricing for the following:

- Functional capacity
- Program capacity
- Temporary capacity
- Utilization

## EXAMPLES FOR CALCULATING CAPACITY

### Maximum Capacity Considerations:

- Total student “seats” (butts in chairs)
- Largely hypothetical – difficult/impossible to operate in a traditional school setting

Example:

25 students x 2 rooms = 50 students at a time

50 students x 8 periods = 400 students per day

Variables: number of students and periods per day

Utilization: The educationally appropriate percentage of the school day that teaching stations can be used for instruction. The calculation equals the ratio of unoccupied to occupied “seats” per teaching station per period.

1 student → 1 seat → 1 time

Hypothesis:

If 25 students each used 8 of 8 periods the school would achieve 100% utilization of their 400 students

### Building Capacity Considerations:

- Total student “seats” (butts in chairs)

## ANCILLARY SERVICES

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- Plus support facilities (non-full time teaching stations)
  - Circulation
  - Administration and student services
  - Commons
  - Dining and Kitchen
  - Restrooms
  - Offices
  - Community support

Example:

**25 students** x 2 rooms = 50 students at a time

50 students x **8 periods** = 400 students per day

**Variables:** number of students and periods per day

PLUS: Support facilities accommodate students throughout the day releasing them from teaching stations (classroom “seats”) to occupy other support areas in the school. Thus lowering the number of butts in chairs in a specific classroom which equates to a lower utilization percentage.

400 student maximum capacity (classrooms) now becomes +/- 350 students for building capacity adding in the support facilities as students occupy these spaces throughout the school day.

### Functional Capacity Considerations:

- Total student “seats” (butts in chairs)
- Plus support facilities – identified in above example (non-full time teaching stations)
- Schedule flexibility

[END OF SECTION]



## PRICING MATRIX

CALCULATING SCHOOL CAPACITY		
Description	UOM	Price
<b>Consulting:</b>		
Consulting Services	Hour	\$ 175.00

Description	UOM	Price
<b>Software Licensing:</b>		
Small School Districts (1 to 10,000 ADA) Install	Unit	\$ 7,500.00
Small School Districts (1 to 10,000 ADA) Support	Annual	\$ 1,000.00
Medium School Districts (11,000 to 30,000 ADA) Install	Unit	\$ 15,000.00
Medium School Districts (11,000 to 30,000 ADA) Support	Annual	\$ 5,000.00
Large School Districts (31,000+ ADA) Install	Unit	\$ 25,000.00
Large School Districts (31,000+ ADA) Support	Annual	\$ 10,000.00

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## DSA COMPLIANCE

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### DSA Digital Document Archive File & Plan Retrieval

- PSS will contact the Division of State Architect Regional Office and file a Public Records Act in order to retrieve the required DSA approved plans and files.

### Inspector of Record Verification

- Inspectors are certified by the Division of the State Architect (DSA) and then approved to work on specific projects. DSA certifies several types of school construction inspectors. As required by law, all project inspectors must be certified through the DSA Project Inspector Examination Program per IR A-7. PSS will verify the Project Inspector selected for the project has a current certification for the required class level per the approved drawings.

### In-Plant Inspector Verification

- For projects involving construction of permanent modular or relocatable buildings, the submittal requirements are the same except the design professional delegated responsibility for the observation of in-plant construction in Section 1.0 or, when subdelegated, Section 1.1 of the DSA 1-MR, shall submit form DSA 5-IPI: In-Plant Project Inspector Qualification and Approval instead. PSS will verify the Project Inspector selected for the project has a current certification for the required class level per the approved drawings.

### Laboratory Evaluation and Acceptance Facilities

- PSS will verify the laboratory facilities has been evaluated and accepted by DSA to perform services on school projects. PSS will also verify the list of testing and special inspection services for which the facility has been approved.

### Relocation Projects Documentation

- Relocation projects are only permitted for the relocation of buildings for which the original building construction is compliant with project certification requirements of the Field Act. Evidence of relocatable building compliance can be either DSA's "Certification of Compliance" letter for the original project wherein the building was constructed, or a final verified report from the in-plant inspector for the original construction of the buildings PSS will verify the original project has been certified with DSA and retrieve the documents required.

### Changes to PC Approved Documents

- PSS will verify the relocatable building/modular is per the original approved PC Approved Documents. Changes to code-regulated aspects of PC documents are not permitted and shall be submitted and reviewed through the regular plan review process. PSS will verify such changes shall be clouded on PC drawings and signed and stamped in accordance with IR A-18: Use of Construction Documents Prepared by Other Professionals, Section 2. It is the project design professional in responsible charge's responsibility to ensure that their drawings and the manufacturer's drawings are correctly coordinated and complete prior to submittal to DSA.

## DSA COMPLIANCE

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### Sub-Delegation for In-Plant and/or On-site

- The design professional in responsible charge shall delegate the responsibility for design and preparation of plans and specifications, observation of in-plant manufacturing, and on-site placement of the permanent modular or relocatable buildings. If delegated such responsibility the design professional may sub-delegate the responsibility for observation of in-plant and/or on-site construction as indicated on form DSA 1-MR. PSS will verify the DSA 1-MR is filed and completed.

### Relocatable Building Fire Alarm Deferred Approval

- Past DSA processes allowed approval of fire alarm designs to be deferred. In some cases, approval of deferred fire alarm designs was not obtained from the DSA. Fire alarms designed for and installed in relocatable buildings were simple in nature and readily verified by testing. Therefore, as an alternate to approved fire alarm Deferred Approvals for relocatable buildings; the DSA will require all of the following:
- PSS will assist with locating a California licensed Architect, or Electrical Engineer or Structural Engineer to witness fire alarm inspection and testing in compliance with NFPA 72.
- PSS will verify the completion and submittal to the DSA of NFPA 72, “Fire Alarm System Record of Completion” form.
- PSS will verify completion and submittal to the DSA of NFPA 72 “Fire Alarm Inspection and Testing” form
- PSS will retrieve a signed letter from the Architect or Electrical Engineer or Structural Engineer stating, “I have witnessed the fire alarm system test for the project and in my opinion the alarm is in essential compliance with NFPA 72.”

### DSA Closeout & Certification of Non-Certified Relocatable & Modular Buildings

- PSS will assist creating a post-construction evaluation program designed by a California licensed Architect or Structural Engineer, and approved by DSA, may be sufficient for purposes of certification. The program would produce a report that provides reasonable evidence that appropriate inspections were performed and that based on the Design Professional’s research, document review, review of as-built conditions and professional judgment, the materials and construction were found to be in essential compliance with the approved construction documents and applicable building codes.

### Removal of Existing Relocatables & Modular Buildings

- PSS will prepare evidence required by the Division of the State Architect that the structures no longer exist. A letter will be drafted by PSS for the District and google earth shot along with site photos.

## DSA COMPLIANCE

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### Leased Relocatable Buildings

- PSS will verify the building being leased by the District is certified the Division of the State Architect. PSS will also verify the certified buildings is per the PC Approved Documents.

### Relocatable Building Numbering

- Each relocatable building unit (module) is required to be identified with an ID tag. The ID tag contains the original DSA application number under which the unit was fabricated and a unique serial number. PSS will verify each building leased or purchased has an ID tag.

### Relocatable Building Constructed Without DSA Approval

- These buildings are “nonconforming” and must be DSA certified prior to use as school buildings, as defined in the Education Code. PSS will prepare the program per the DSA certification guide:
- The Architect/Engineer certification program. This program must be developed by a California Licensed Architect or Structural Engineer:
- Architect identifies building manufacturer, fabrication date, and serial number from tag on the building. If available, also obtains any PC number or application number.
- Architect works collaboratively with manufacturer to obtain plans for the building that was constructed. If available, also obtains any in-plant inspection reports from the RBIP (even if based upon unapproved plans or PC plans).
- Architect develops and submits a proposed inspection and testing program for the building to the DSA for concurrence and approval. Supervisor shares with DSE for concurrence with the proposed program. Supervisor approves program upon concurrence. For the inspection and testing program usually requires that all gravity and lateral load path members and details be observed; some destructive testing/inspection may be necessary. The DSA has accepted either a written detailed listing of the members and details on the plans, or a marked-up set of plans indicating the items to observe. Material testing (steel coupons, concrete tests, etc.) may be required.
- Upon approval of inspection program, the District hires a DSA approved RBIP and/or a Class 1 inspector and, as required, a welding inspector to perform the inspections of the building.
- Inspector prepares 95% FVR (DSA-6) based upon a pending approved application and plans. This inspection occurs before plan submittal to verify that the plans being submitted are in fact applicable for that building.
- Architect makes any design adjustments to the structure and then submits plans to the DSA as a “new” project. The project construction documents must comply with the current codes in effect at the time the “new” application is submitted.
- Upon approval of plans, the Project Inspector completes inspection and files 100% DSA-6, per current practice. Depending upon certification level, the Project Inspector could be same for site inspection; however, in that case, separate DSA-6 forms would be required (one for the site and one for the building).

## ANCILLARY SERVICES

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- The DSA then initiates closeout (certification) and PSS will verify certification

### WORKING ON :

- Temporary Approval for Relocatable Buildings
- Alternative Plan Review Process for Non-Conforming Buildings
- DSA Oversight Construction Process
- Requirements

### Requirements & Qualifications

- The firm must have a minimum 10 years of experience working with the Division of the State Architect.
- The firm must have experience working with all four DSA Regional Offices in California.
- The firm must have closed out and certified 600 projects.
- The firm must have experience assisting with the DSA 312 A/E Alternate Certification Program
- The firm must have assisted with certifying 20 projects that were non DSA approved relocatable buildings.
- The firm must provide 50 Certification Letters their firm assisted with certifying.
- The firm must have documented processes and procedures for their services listed below.

### Services

- DSA Digital Document Archive File & Plan Retrieval
  - THE FIRM will contact the Division of State Architect Regional Office and file a Public Records Act in order to retrieve the required DSA approved plans and files.
- Inspector of Record Verification
  - Inspectors are certified by the Division of the State Architect (DSA) and then approved to work on specific projects. DSA certifies several types of school construction inspectors. As required by law, all project inspectors must be certified through the DSA Project Inspector Examination Program per IR A-7. THE FIRM will verify the Project Inspector selected for the project has a current certification for the required class level per the approved drawings.
- In-Plant Inspector Verification
  - For projects involving construction of permanent modular or relocatable buildings, the submittal requirements are the same except the design professional delegated responsibility for the observation of in-plant construction in Section 1.0 or, when subdelegated, Section 1.1 of the DSA 1-MR, shall submit form DSA 5-IPI: In-Plant Project Inspector Qualification and Approval instead. THE FIRM will verify the Project Inspector selected for the project has a current certification for the required class level per the approved drawings.
- Laboratory Evaluation and Acceptance Facilities
  - THE FIRM will verify the laboratory facilities has been evaluated and accepted by DSA to perform services on school projects. THE FIRM will also verify the list of testing and special inspection services for which the facility has been approved.
- Relocation Projects Documentation

## ANCILLARY SERVICES

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- Relocation projects are only permitted for the relocation of buildings for which the original building construction is compliant with project certification requirements of the Field Act. Evidence of relocatable building compliance can be either DSA's "Certification of Compliance" letter for the original project wherein the building was constructed, or a final verified report from the in-plant inspector for the original construction of the buildings THE FIRM will verify the original project has been certified with DSA and retrieve the documents required.
- Changes to PC Approved Documents
  - THE FIRM will verify the relocatable building/modular is per the original approved PC Approved Documents. Changes to code-regulated aspects of PC documents are not permitted and shall be submitted and reviewed through the regular plan review process. THE FIRM will verify such changes shall be clouded on PC drawings and signed and stamped in accordance with IR A-18: Use of Construction Documents Prepared by Other Professionals, Section 2. It is the project design professional in responsible charge's responsibility to ensure that their drawings and the manufacturer's drawings are correctly coordinated and complete prior to submittal to DSA.
- Sub-Delegation for In-Plant and/or On-site
  - The design professional in responsible charge shall delegate the responsibility for design and preparation of plans and specifications, observation of in-plant manufacturing, and on-site placement of the permanent modular or relocatable buildings. If delegated such responsibility the design professional may sub-delegate the responsibility for observation of in-plant and/or on-site construction as indicated on form DSA 1-MR. THE FIRM will verify the DSA 1-MR is filed and completed.
- Relocatable Building Fire Alarm Deferred Approval
  - Past DSA processes allowed approval of fire alarm designs to be deferred. In some cases, approval of deferred fire alarm designs was not obtained from the DSA. Fire alarms designed for and installed in relocatable buildings were simple in nature and readily verified by testing. Therefore, as an alternate to approved fire alarm Deferred Approvals for relocatable buildings; the DSA will require all of the following:
  - THE FIRM will assist with locating a California licensed Architect, or Electrical Engineer or Structural Engineer to witnesses fire alarm inspection and testing in compliance with NFPA 72.
  - THE FIRM will verify the completion and submittal to the DSA of NFPA 72, "Fire Alarm System Record of Completion" form.
  - THE FIRM will verify completion and submittal to the DSA of NFPA 72 "Fire Alarm Inspection and Testing" form.
  - THE FIRM will retrieve a signed letter from the Architect or Electrical Engineer or Structural Engineer stating, "I have witnessed the fire alarm system test for the project and in my opinion the alarm is in essential compliance with NFPA 72."
- DSA Closeout & Certification of Non-Certified Relocatable & Modular Buildings
  - THE FIRM will assist creating a post-construction evaluation program designed by a California licensed Architect or Structural Engineer, and approved by DSA, may be sufficient for purposes of certification. The program would produce a report that provides reasonable evidence that appropriate inspections were performed and that based on the Design Professional's research, document review, review of as-built conditions and professional judgment, the materials and construction were found to be in essential compliance with the approved construction documents and applicable building codes.
- Removal of Existing Relocatable & Modular Buildings

## ANCILLARY SERVICES

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- THE FIRM will prepare evidence required by the Division of the State Architect that the structures no longer exist. A letter will be drafted by THE FIRM for the District and google earth shot along with site photos.
- Leased Relocatable Buildings
  - THE FIRM will verify the building being leased by the District is certified the Division of the State Architect. THE FIRM will also verify the certified buildings is per the PC Approved Documents.
- Relocatable Building Numbering
  - Each relocatable building unit (module) is required to be identified with an ID tag. The ID tag contains the original DSA application number under which the unit was fabricated and a unique serial number. THE FIRM will verify each building leased or purchased has an ID tag.
- Relocatable Building Constructed Without DSA Approval
  - These buildings are “nonconforming” and must be DSA certified prior to use as school buildings, as defined in the Education Code. THE FIRM will prepare the program per the DSA certification guide:
    - The Architect/Engineer certification program. This program must be developed by a California Licensed Architect or Structural Engineer:
    - Architect identifies building manufacturer, fabrication date, and serial number from tag on the building. If available, also obtains any PC number or application number.
    - Architect works collaboratively with manufacturer to obtain plans for the building that was constructed. If available, also obtains any in-plant inspection reports from the RBIP (even if based upon unapproved plans or PC plans).
    - Architect develops and submits a proposed inspection and testing program for the building to the DSA for concurrence and approval. Supervisor shares with DSE for concurrence with the proposed program. Supervisor approves program upon concurrence. For the inspection and testing program usually requires that all gravity and lateral load path members and details be observed; some destructive testing/inspection may be necessary. The DSA has accepted either a written detailed listing of the members and details on the plans, or a marked-up set of plans indicating the items to observe. Material testing (steel coupons, concrete tests, etc.) may be required.
    - Upon approval of inspection program, the District hires a DSA approved RBIP and/or a Class 1 inspector and, as required, a welding inspector to perform the inspections of the building.
    - Inspector prepares 95% FVR (DSA-6) based upon a pending approved application and plans. This inspection occurs before plan submittal to verify that the plans being submitted are in fact applicable for that building.
    - Architect makes any design adjustments to the structure and then submits plans to the DSA as a “new” project. The project construction documents must comply with the current codes in effect at the time the “new” application is submitted.
  - Upon approval of plans, the Project Inspector completes inspection and files 100% DSA-6, per current practice. Depending upon certification level, the Project Inspector could be same for site



## ANCILLARY SERVICES

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inspection; however, in that case, separate DSA-6 forms would be required (one for the site and one for the building).

- Temporary Approval for Relocatable Buildings
  - THE FIRM will manage the compliance of IR A-1.16 for temporary approval of the installation Division of the State Architect (DSA) approved relocatable buildings on public school campuses for emergency use or use during modernization projects.
- Alternative Plan Review Process for Non-Conforming Buildings
  - THE FIRM will manage the program of a building, modular or relocatable that has not been approved for use as a school or Community College building by DSA. Evaluation, design, or rehabilitation of existing non-school or non-conforming school buildings may be submitted utilizing the regulations of Section 4-307, Part 1, California Administrative Code and the adopted provisions of Part 10, California Existing Buildings Code. THE FIRM will schedule a pre-application meeting with the local DSA Regional Office in order to discuss the applicable requirements.
- Expedited Review Process for Relocatable Buildings
  - THE FIRM will assist the AOR with DSA Policy 07-02 expediting the over-the-counter process. The Over-the-Counter Review process is available for buildings with previously approved “Pre-Check” (PC) plans. An appointment is required. The A/E of Record meets face-to-face with DSA reviewers at the DSA regional office. Site plans are submitted and reviewed; building plans are compared to previously approved PC plans. The process is usually completed and the project approved by DSA within two hours or less.
- Changes in Delegation of Responsibility
  - THE FIRM will request for a DSA 108 form to be completed for the change of the individual delegated the responsibility. A copy will be issued to the District and the Division of the State Architect.
- Independent Special Inspector(s) (SI) Contracted with District
  - For any Special Inspectors hired directly by the District THE FIRM will request for the DSA 5SI to be completed, filed, distributed to the construction team and DSA.
  -
- DSA Construction Oversight Compliance
  - THE FIRM will manage the DSA construction oversight compliance for pre-construction, construction and closeout ensuring certification.
  - Pre- Construction
    - Confirm the team has a copy of the approved plans and specs such as the District, Project Inspector, Lab of Record or any independent special inspector hired by the District.
    - Verify the DSA 102 has the correct information of each party required for the project.
    - Review the DSA 103 and scheduling with the PI and Lab of Record.
  - Construction
    - Confirm if any changes have been made to the DSA approved construction documents that trigger fire life, structural or access a CCD has been submitted to DSA for review and approval by the Design Professional.
    - Verify the DSA 103 has been completed per the approved plans.
    - Proper forms are uploaded to DSA Box.
  - Closeout

## ANCILLARY SERVICES

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- Proper forms from each party listed on the DSA 102-IC has been uploaded to DSA Box.
- Verify all CCD's have been approved by DSA.
- Certification
  - THE FIRM will inform the construction team, Project Inspector, District, Design Professional, and other consultants the project is certified and provide a copy of the letter.

[END OF SECTION]

## PRICING MATRIX

<b>DSA COMPLIANCE</b>		
<b>Description</b>	<b>UOM</b>	<b>Price</b>
DSA Digital Document Archive File & Plan Retrieval	Hour	\$ 125.00
Inspector of Record Verification	Hour	\$ 125.00
In-Plant Inspector Verification	Hour	\$ 125.00
Laboratory Evaluation & Acceptance Facilities	Hour	\$ 125.00
Relocation Projects Documentation	Hour	\$ 125.00
Changes to PC Approved Drawings & Documents	Hour	\$ 125.00
Sub-Delegation for In-Plant and/or On-site	Hour	\$ 125.00
Relocatable Building Fire Alarm Deferred Approval	Hour	\$ 125.00
DSA Closeout & Certification of Non-Certified Relocatable & Modular Building	Hour	\$ 125.00
Lease Relocatable Building	Hour	\$ 125.00
Relocatable Building Number	Hour	\$ 125.00
Relocatable Building Constructed Without DSA Approval	Hour	\$ 125.00
Temporary Approval for Relocatable Buildings	Hour	\$ 125.00
Alternative Plan Review Process for Non-Conforming Buildings	Hour	\$ 125.00
Expedited Review Process for Relocatable Buildings	Hour	\$ 125.00
Changes in Delegation of Responsibility	Hour	\$ 125.00
Independent Special Inspector(s) (SI) Contracted w/District	Hour	\$ 125.00
DSA Construction Oversight Compliance (New Construction)	Hour	\$ 125.00

## ANCILLARY SERVICES

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## **ANCILLARY SERVICES**

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### **CONSTRUCTION MANAGEMENT SERVICES**

Construction Management Services Firm shall provide the following services:

**Preconstruction:**

- a) Site Assessment
- b) Project Budgeting
- c) Detailed Estimating
- d) Constructability review
- e) Project Scheduling

**Bidding and Construction Services:**

- a) Bid Preparation
- b) Bid Review
- c) Project Coordination
- d) Site Logistics
- e) Cost Controls
- f) Schedule Management
- g) Contract Modification Control
- h) Document Control
- i) Progress reporting
- j) Claims Avoidance
- k) Photographic History of the Project Construction
- l) As-Builts
- m) Value Engineering
- n) Project Closeout
- o) Supervised the collection of the punch list items and the corrections of all unfinished work and punch list items

**Post Construction Services**

- a) Including but not limited to supervision and correction of all warranty items related to the project for the one-year warranty period.

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[END OF SECTION]

## Basis of Award Summary Bid Option 2, Tab D: *Ancillary Services*

1. Bidder Requirements
  - 1.1. Bidder is required to complete all items noted on the Pricing Matrix and the Basis of Award Summary in this tab.
  - 1.2. Failure to provide costs for each and every item for Tabs B-D in Bid Option 2 shall result in this Bid Option 2 being declared “non-responsive”.
2. Discrepancies: If there is any discrepancy between costs provided on the Pricing Matrix and the Basis of Award Summary in this tab, only the lowest cost shall be utilized by the DISTRICT.
3. Basis of Award Form Summary
  - 3.1. This form represents a hypothetical example of needed services for a project (or projects) that the DISTRICT may utilize under Bid Option 2.
  - 3.2. The Basis of Award Summary shall be completed using the costs noted by the bidder in the Pricing Matrix in this tab and shall be utilized for purposes of determining the lowest cost responsible bidder by combining this with the final Basis of Award form for Bid Option 2: Tabs B-D.
4. Project Description
  - 4.1. This is a hypothetical project for the DISTRICT with for services based on standard classroom educational and support programs.
  - 4.2. The costs represent the same costs noted on the Pricing Matrix and applied to this hypothetical project.
  - 4.3. The summary total cost from this tab shall be combined with other tabs in Bid Option 2 and that final cost will be the basis for awarding Bid Option 2.

### Bidder Name:

Product Description	Total
<i>Interior/Exterior "Finish"</i>	\$3,150.00
<i>Pre-Bid Plan and Specification</i>	\$1,275.00
<i>Modernization Sustainability Coordinator</i>	\$1,600.00
<b><u>GRAND TOTAL:</u></b>	\$6,025.00

## **Basis of Award Summary Bid Option 2, Tab *D*: *Ancillary Services***

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## **Basis of Award for TABs A-D**

1. Bidder Requirements
  - 1.1. Bidder is required to complete all items noted on the Pricing Matrix and the Basis of Award.
  - 1.2. Failure to provide costs for each and every item shall result in the bid being declared “non- responsive”.
2. Discrepancies: If there is any discrepancy between costs provided on the Pricing Matrix and the Basis of Award, only the lowest cost shall be utilized by the DISTRICT.
3. Basis of Award
  - 3.1. This form represents a hypothetical example of a project (or projects) at DISTRICT that may be utilized under the bid.
  - 3.2. The Basis of Award shall be completed using the costs noted by the bidder in the Pricing Matrix and shall be utilized for purposes of determining the lowest cost responsible bidder.
4. Project Description
  - 4.1. This is a hypothetical project for the DISTRICT with items found in a standard classroom educational and support programs.
  - 4.2. The costs represent the same costs noted on the Pricing Matrix and applied to this hypothetical project.
  - 4.3. The grand total cost shall be the basis for awarding the bid.
5. Notice to Contractor
  - 5.1. Understand that all materials to be installed are to be received as a completed project.
  - 5.2. All sundry items necessary for a completed project is to be included in the prices below.
6. DISTRICT Material / Attic Stock / Stored Material
  - 6.1. DISTRICT owned materials for these projects shall be stored by the contractor.

## Basis of Award for TABs A-D

7. Delivery, Storage, Warehousing, and Pick Up
  - 7.1. Contractor will be responsible for delivering, storing, and warehousing materials for the term of the contract.
  - 7.2. Price includes delivery FOB to destinations in the following counties in the State of CA: Sonoma, Marin, San Francisco, San Mateo, Santa Cruz, Santa Clarita, Alameda, Contra Costa, San Joaquin, Stanislaus, Merced, Fresno, Solano, Napa, Sacramento, Yolo, El Dorado, Placer, Santa Barbara, Ventura, Los Angeles, Orange, San Diego, Riverside, San Bernadino.
  - 7.3. All other counties and areas outside the listed are subject to a 20% freight cost.
  - 7.4. Price shall not include sales tax.
  - 7.5. At the time of purchase, taxes will be paid by the DISTRICT.

Bid Option #1:

TAB	Total
<i>TAB A-Portable</i>	N/A

Bid Option #2:

TAB	Total
<i>TAB B-Modular/Pre-Fabricated Components</i>	\$2,035,200.00
<i>TAB C-Ancillary Materials</i>	\$512,802.00
<i>TAB D-Ancillary Services</i>	\$6,025.00

<b>Grand Total</b>	\$2,554,027.00
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## **Basis of Award for TABs A-D**

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[END OF SECTION]