

# Scope of Services

## *East Side Community Transit Connectivity Project*

---

In order to better illustrate the unique aspects of our proposed work plan we have broken down the scope of services in the RFQ by individual tasks. This approach allows for clearer understanding of the required tasks and allows us the ability to highlight unique qualifications of our team and our proposed approach.

Under contract to the City of San Carlos, Callander Associates will facilitate public outreach, prepare plans and specifications delineating these improvements. To assist you in these efforts, we would propose to complete the following tasks in chronological order. The items shown in ***bold-face italics*** are documents that we would prepare as part of our tasks.

### **1.0 PROJECT MANAGEMENT**

- 1.01 **Meeting Preparation and Follow Up:** We will prepare for each meeting to ensure meetings are focused and achieve desired goals. Meeting preparation and follow up shall include;
- ***Agendas:*** Reviewed in advance these will keep meetings focused and ensure comprehensive communication.
  - ***Meeting Summaries:*** Submitted electronically to agreed upon distribution list within 48 hours of meetings with clear identification of action items, responsible parties and due dates. Summaries shall include 8 1/2x11 pdf images of graphics presented.
- 1.02 **Monthly Status Reports:** Prepare monthly ***status reports*** as part of our standard invoicing procedures. Updates shall include tasks completed within the last month, tasks anticipated to be completed within the next month, and status of contract/percentage complete.
- 1.03 **Project Schedule and Monitoring:** Prepare a detailed ***project schedule*** in MS Project. Schedule will be modified and submitted monthly with completed tasks and critical path items clearly indicated.

### **2.0 REVIEW PRELIMINARY DESIGN STUDIES**

- 2.01 **Review Studies / Summary Memo:** Obtain and review pertinent information prior to project kick-off meeting to familiarize our team with the project background, goals, and to ensure a productive first meeting. Review shall include General Plan, station area planning efforts, East Side Connection concept plans and estimates (prepared by Callander Associates), MTC application (prepared by Callander Associates), Hexagon bicycle lane/parking study, and other items. Identify available base information and required information. Prepare ***summary memo***.

### **3.0 COMMUNITY INPUT**

- 3.01 **Staff Meeting - Project Kick-off Meeting:** Prepare for and facilitate a single meeting with City staff and Steering Committee members. Review and reconfirm project goals and objectives,

scope, and schedule. Review summary of document review and reconfirm key aspects related to current effort. Review grants status and funding requirements. Submit written **meeting summary**. Conduct site reconnaissance to confirm existing conditions. Take site photos for studio and presentation purposes.

- 3.02 **Community Outreach Approach / Stakeholder Identification Database Preparation:** As part of task 3.01, we will review the public outreach, identify meeting locations, and establish approximate meeting dates and invitation methods. Review stakeholder groups/individuals to reach out to, determine contacts, and confirm protocols for contact.
- 3.03 **Meeting Announcement:** Prepare project **meeting announcement** twice during the process. Announcements shall contain a combination of graphic images and text information about the project and the community involvement process to maximize attendance. Submit camera ready originals for reproduction and distribution by City staff. Postage and mailing to be provided by the City.
- 3.04 **Community Workshop Materials:** As the purpose for the first community workshop is to solicit input on the conceptual design prepared for the MTC grant, we will utilize those previously prepared graphics, project limits diagrams, site photos, etc. Prepare **PowerPoint** presentation to facilitate review of process, opportunities for input, current design plans, etc. Enlarge grant application graphics and mount on poster board. In addition, prepare **workshop materials** including sign in sheets, agendas, questionnaires, etc.
- 3.05 **Stakeholder Meetings:** Meet with City staff and key stakeholders, as identified in task 3.02, at up to five separate meetings, to obtain initial feedback, concerns, input, etc. Meetings may include business owners, BPAC committee, and others to be determined. Submit written **meeting summaries** for each.
- 3.06 **Community Workshop #1:** Present the above information in a single community workshop. Review conceptual plans prepared to date and facilitate feedback. Develop interactive exercises to engage participants and to evaluate community likes and dislikes. Provide written **workshop summary**.
- 3.07 **Staff Meeting – Community Workshop Results / Design Refinements:** Review the input received from the above with City staff and Steering Committee members in a single work session. Review and discuss strategy for design refinements. Prepare **meeting summary**.
- 3.08 **Refined Design Plans:** Based upon feedback from above, proceed to refine design alternatives and prepare plans and supporting documents for the entire project. The **refined preliminary design concept package** will include:
- Site Plans: prepared at 40 scale for the entire corridor – 4 Sheets
  - Enlargement Plans: prepared at 20 scale for selected locations –4 locations
  - Photo Realistic Elevations: prepared at ¼ scale – (3 total)
  - Proposed Materials: Prepare image boards of proposed construction materials, lighting, site furniture, and plant palette: Boards shall be a categorized series of photographs

- Cost Estimates: Proceed to refine MTC application cost estimate to reflect changes in the design.
- 3.09 **Community Workshop Materials:** Prepare **PowerPoint** presentation to facilitate review of process to date, refined design plans, etc. In addition, prepare **workshop materials** including sign in sheets, agendas, questionnaires, etc.
- 3.10 **Staff Meeting – Review Refined Design Plans:** Present the above information, review and discuss workshop strategy and make refinements to plans where prudent. Prepare **meeting summary**.
- 3.11 **Community Workshop #2:** Prepare for and facilitate community workshop #2. The goal of the workshop is to present findings from the first workshop, present refined design plans, and obtain feedback. Utilize above information to facilitate discussion. Provide **workshop summary**.
- 3.12 **Final Design Plan:** Based upon feedback, proceed to refine **preliminary design concept package** where prudent. Prepare **PowerPoint** presentation for Commission/Council presentations.
- 3.13 **Commission / Council Meetings:** Present the above information at two separate meetings to include Transportation and Circulation Commission and City Council. Make minor revisions to package as necessary based upon input.

#### **4.0 DESIGN DEVELOPMENT REPORT**

- 4.01 **Topographic Survey:** Proceed to prepare topographic survey in AutoCAD format based upon newly flown aerial photograph. Aerial will be provided at 1"=20' with one foot contour intervals. Aerial survey will be supplemented with field data to identify tree and trunk locations, visible utilities, as well as map underground utilities based upon available utility records. Boundary information will be illustrated based upon review of title reports (provided by City). Submit **topographic survey**.
- 4.02 **Geotechnical Report:** Proceed to prepare **geotechnical report** addressing pavement recommendations, design review, analysis of suitability of infiltration from green street BMP's (swales, rain gardens, permeable pavement, etc.), analysis or recommendations regarding potentially contaminated soil, particularly also with respect to the infiltration, soil corrosivity – since recent experiences have been that PG&E is sensitive to this issue with underground vaults. Submit report.
- 4.03 **Staff Meeting – Construction Document Kick-off Meeting:** Review, project schedule, project team coordination, and design refinements with City staff. Submit **written summary**.
- 4.04 **Base Sheet Development:** Utilizing the above information, proceed to prepare base sheets at a scale of 1"=20' utilizing City of San Carlos title blocks and relevant standards. Conduct site reconnaissance to confirm survey and existing conditions. Take site photos for studio and presentation purposes.

- 4.05 **Design Development Plan – Construction Documents 35% Submittal:** Based on the approved design plans, proceed to develop *draft construction documents* to a 35% level of completion. All drawings shall be prepared on AutoCAD in a 24" x 36" sheet format and adhere to City of San Carlos standards. Provide (1) full sized and four (4) half sized sets of plans for distribution to various City departments. Package to include:
- Title sheet, including sheet index, vicinity map, consultant information, and base sheet legend
  - Preliminary Demolition Plans, illustrating proposed removals
  - Preliminary Grading Plans, illustrating overall grading and drainage concept including proposed drains, drain lines, connections, major spot elevations, stormwater treatment solutions and sheet flow direction. Contours, pipe sizing, inlet sizing, and additional detail will not be provided.
  - Preliminary Site construction Plans, showing overall layout, materials, lighting locations and delineation of site furnishings.
  - Preliminary Irrigation Plans, showing point of connection, controller and backflow locations, irrigation equipment legend.
  - Preliminary Planting plans, showing proposed plant palette and locations.
  - Detail Sheets, preliminary details of various site improvements including pavement sections, irrigation equipment, plant material installation, curbs, walls, edgings, custom details, etc. to a design level only.
  - Outline Specifications
- 4.06 **Design Development Booklet:** Assemble details, catalog cuts, sketches and other information as necessary to convey design intent. Materials assembled may include catalog cuts and photos of proposed site furnishings, plant palette, light fixtures, and other improvements. Assemble and bind into 8 1/2x11 *design development booklet* and submit for review.
- 4.07 **Complete Street / Green Street Solutions Memo:** Prepare *summary memo* of innovative techniques and green street solutions to be utilized including product literature. Incorporate into above design development booklet.
- 4.08 **Cost Estimate:** Prepare an updated list of quantities and submit updated *construction cost estimate*.
- 4.09 **Design Development Report (DDR):** Compile above information into a single 11x17 *design development report package*. Submit 5 copies for review.
- 4.10 **Staff Meeting #5 – DDR Review:** Present the above information at a single staff meeting. This meeting will be the primary opportunity to review specific aspects of the project including budget, construction details, review upcoming review meetings, and implementation schedule. Develop consensus for proceeding and document meeting in a *meeting summary*.

## **5.0 FACILITATE REVIEW OF DESIGN DEVELOPMENT REPORT**

- 5.01 **Presentation Materials:** Prepare *PowerPoint* presentation to facilitate review of the above information. Assist City staff in preparing staff reports.
- 5.02 **Agency, Commission, and Council Meetings:** Present the above information at three separate meetings to include funding agency, Transportation and Circulation Commission, and City Council.
- 5.03 **Design Development Report Revisions:** Incorporate refinements in subsequent construction document submittals.

## **6.0 UNDERGROUND UTILITY DISTRICT ENGINEERING**

AEC Electrical Engineers will provide the following joint trench design services.

- 6.01 **Existing Data:** Collect and study the existing as-built utility drawings of the project area.
- 6.02 **Field Surveys:** Conduct field surveys to verify the existing site conditions. Identify all overhead and underground utilities.
- 6.03 **Supporting Documents:** Prepare undergrounding district boundary maps and prepare documentation for formation of undergrounding districts. Present undergrounding district documents to City of San Carlos for review and approval.
- 6.04 **Team Coordination:** Coordinate with project team of the City for the relocation / installation of street lighting conduit in the project area. The cost of installing the street lighting conduit in the joint trench will be estimated in Form B for the City to determine whether the street lighting conduit will be installed as a part, and share the cost, of the joint trench.
- 6.05 **Design:** Design for the modifications of power system in the project areas described above and in the affected private properties, including new connections to existing meters.
- 6.06 **PG&E Coordination:** Coordinate with PG&E for the schedule and installation of the underground electric utility and modification of the existing electric services to each private property. Coordinate with PG&E for resolving the conflict with existing underground transmission and distribution lines.
- 6.07 **AT&T Coordination:** Coordinate with AT&T for the schedule and installation of the underground telephone services and modification of the existing telephone services to each private property.
- 6.08 **Comcast Coordination:** Coordinate with Comcast for the schedule and installation of the underground cable TV services and modification of the existing cable TV services to each private property.
- 6.09 **Composite Plans:** Prepare joint trench composite plans and details for review and approval by City of San Carlos and PG&E.
- 6.10 **Takeoffs:** Prepare quantity takeoffs and Form B for joint trench and service laterals.

- 6.11 **Cost Estimate:** Prepare material and structure placing costs for this project.
- 6.12 **Specifications:** Prepare construction specifications of the joint trench installation.
- 6.13 **Review Meetings:** Attend design coordination and review meetings with the City of San Carlos, PG&E and utility company staff.
- 6.14 **Updates:** Update plans and Form B per review comments.
- 6.15 **Assistance:** Assist City of San Carlos in coordinating service conversion/reconnection work with property owners affected by this project.
- 6.16 **Potholing Assistance:** Assist the City of San Carlos in coordinating and identifying the potholing activities. Document collected data in composite joint trench plans.

## **7.0 FINAL DESIGN PACKAGE**

- 7.01 **Construction Documents – 60% Submittal:** Based upon comments received on the 35% submittal by the City, proceed to develop **construction documents** to a 60% level of completion. Plans shall adhere to City of San Carlos standards and specifications and prepared on City standard title block. Provide (1) full sized and four (4) half sized sets of plans for distribution to various City departments. Package to include:
- Title Sheet
  - General Notes
  - Demolition Plans
  - Horizontal Control Plans
  - Plan and Profiles
  - Utility and Storm Drainage
  - Signage and Striping
  - Site Construction Plans
  - Electrical Plans / Signal Modification Plans
  - Erosion Control Plans
  - Irrigation Plans
  - Planting plans
  - Construction Details
- 7.02 **Draft Specifications:** Prepare and submit five (5) copies of the draft **specifications book and bid form**, including appropriate technical sections using City of San Carlos standard boilerplate specifications and federal provisions as appropriate.
- 7.03 **Cost Estimate:** Prepare an updated list of quantities and submit updated **construction cost estimate**.
- 7.04 **Staff Meeting – 60% Submittal Review:** Review the above information in a single work session with City staff. Prepare **written summary**.

- 7.05 **Construction Documents – 90% Submittal:** Based upon comments received on the 60% submittal by the City, proceed to develop **construction documents** (plans, specifications, and cost estimate) to a draft 90% level of completion. Submit five (5) full size sets for review.
- 7.06 **Storm Water Pollution Prevention Plan (SWPPP):** Evaluate the site and schedule to determine the risk level of the project construction. Based upon the evaluation, prepare required notice of intent (NOI) and storm water pollution prevention plan (SWPPP) in order to obtain the necessary General Permit for the project, from the California State Water Resources Control Board (SWRCB). The plan shall include required information such as existing conditions description and plan, scope of construction, grading plan, rain event action plan, inventory of contractor's activities, special site conditions, best management practices (BMPs) for contractor activities, BMPs for erosion and sediment control, post construction BMPs, and monitoring/maintenance plan. Submit draft NOI and SWPPP to city for review. Incorporate comments and submit two (2) copies of NOI and SWPPP binder to City for application and submission to SWRCB.
- 7.07 **Staff Meeting – 90% Submittal Review:** Review the above information in a single work session with City staff. Prepare **written summary** of meeting via email.
- 7.08 **Bid Documents – 100% Submittal:** Based upon comments received on the 90% submittal by the City, proceed to modify the documents for submission as a **final bidding package** including final **engineer's estimate**. Provide five (5) sets of full size plans and specifications, plus camera-ready originals of the plans and specifications for bidding.
- 7.09 **Project Archive:** Submit one **archive CD-ROM** of all electronic data including construction documents (AutoCAD and PDF formats), specifications, cost estimate, survey, and other scanned base information provided by the City.

## **8.0 BIDDING AND CONSTRUCTION ASSISTANCE**

*Fees for construction support services are for budgetary purposes. Construction support services to be provided for this project are proposed for billing on a time and material basis for the budget provided. We have included time for typical bidding support, shop drawing submittal reviews, responses to RFI's, limited site visits, and record drawing preparation. Upon completion of the construction documents, BKF will provide a separate proposal for construction survey services.*

*During the bidding and construction of East Side Roadway Improvement Project, the Callander Associates' team will provide construction administration services to support City Inspectors. Services may include the following:*

- 8.01 Pre-Construction Phase
- Attend pre-bid meeting and assist City staff as directed.
  - Respond to bidder's questions.
  - Prepare and issue addenda as required.
  - Attend pre-construction conference and prepare meeting minutes.

- Assist City with uploading the PRD's to the SWRCB SMARTS system.

#### 8.02 Construction Phase

- Attend construction meetings as requested by the City.
- Review pertinent submittals.
- Review and respond to contractor RFIs
- Update and amend the SWPPP based upon site conditions and alterations to the erosion and sediment control measures in the SWPPP.
- Perform site visits and reviews as required by the specifications. Follow-up with field reports. Site visits included in number of meetings specified in item above.
- Attend substantial completion and provide punch list items and follow-up with corrective measures.

#### 8.03 Post Construction Phase

- Attend final walk-through and verify completion of punch-list items.
- Review as-builts with Contractor and submit to City.
- Prepare record drawings from Contractor mark-ups.
- Provide City with full-size set of record drawings and electronic files on CD to the Department of Public Works.

### **9.0 ADDITIONAL SERVICES**

9.01 All tasks not specifically noted above could be performed as additional services. These tasks would include, but not be limited to, all revisions or additional submittals required by the City or any other agency's review, other meetings, additional design studies, additional bid alternates or other tasks not specifically noted in the foregoing. These services would be billed hourly or on a lump sum fee basis to be documented in a written amendment to this agreement. Construction document services do not include any services for contamination remediation. It assumes that all clean up will be complete prior to construction.

### **10.0 REIMBURSABLE EXPENSES**

10.01 In addition to the above fees, we would bill for all printing and reproduction, delivery, horticultural soils samples, the communication and insurance surcharge, and other reimbursable expenses as noted in the attached Standard Schedule of Compensation. You should establish a tentative budget for these expenses (see 7.0 Summary below). These costs will be itemized on our invoice and compared monthly with the total allowances to assist you in monitoring these costs.

-END-