



## **SCHOOL BOARD ACTION REPORT**

**DATE:** February 23, 2020  
**FROM:** Denise Juneau, Superintendent  
**LEAD STAFF:** Fred Podesta, Chief Operations Officer  
(206) 252-0636 [fhpodesta@seattleschools.org](mailto:fhpodesta@seattleschools.org)

**For Introduction:** March 25, 2020  
**For Action:** April 7, 2020

### **1. TITLE**

BTA V Building Condition Assessment: Award Contract # K1379 to perform building condition assessment services

### **2. PURPOSE**

This Board Action Report provides authorization for the Superintendent to enter into a contract to secure services for assessing building conditions for schools that are not currently under construction or newly opened. This information will be used to determine facility needs and prioritize future levy (BTA V, BEX VI) requests. A building condition assessment performed by a certified consultant every 6 years is also a requirement of the Office of the Superintendent of Public Construction (OSPI) as part of the School Construction Assistance Program (SCAP). The certified condition assessment is due in 2020.

### **3. RECOMMENDED MOTION**

I move that the School Board authorize the Superintendent to execute consultant contract No. #K1379 with Sazan Environmental Services in an amount not to exceed \$464,599 for the certified building condition assessment of 92 district properties, with any minor additions, deletions, and modifications deemed necessary by the Superintendent, and to take any necessary actions to implement the contract.

### **4. BACKGROUND INFORMATION**

#### **a. Background**

This motion supports the continued effort of the district to enhance and maintain all school facilities to support the learning environment. The district currently owns 117 properties with an average age of 61 years. With anticipated need for increased capacity at some locations, an overall condition assessment is required to make informed decisions on where to allocate funds to achieve the best return on investments. Additionally, OSPI requires a certified building condition assessment be performed by a consultant every six years. The next certified assessment is due in 2020.

Under this contract, 92 existing schools will be assessed. The evaluation will look at the condition of the existing site, improvements, playgrounds, building envelopes and building systems.

The district publicly advertised Request for Proposal RFP11930: Consultant Services for Building Condition Assessment project on January 7, 2020, with a total number of four proposals received on February 5, 2020. Sazan Environmental Services was deemed to be in the best interests of the district, all factors considered. Upon review of all proposals, the recommendation is to enter into an agreement with Sazan Environmental Services, to complete the necessary assessment.

**b. Alternatives**

Without an updated facilities condition assessment, Capital Projects will continue to utilize the 2018 Facilities Condition Assessment Update to guide its work. This course of action may lead to underestimating the extent of necessary repairs as existing system degradation may have accelerated at a pace faster than anticipated in some buildings more than others. Additionally, without a certified building condition assessment completed and recorded in the OSPI database, the district might not be eligible for SCAP funding on the upcoming BEX V projects. The individual projects would need to address the requirement for a certified assessment resulting in multiple consultants performing the work.

**c. Research**

Careful research has been done to ensure data obtained in this assessment will be used to inform the BTA V levy planning process, as well as satisfy reporting requirements for future state funding assistance. Capital Planning reviewed the Board's guiding principles from the most recent levy planning effort (BEX V), Board Policy 6901, OSPI data requirements, and the most recent condition assessment data. The required certified assessment (for OSPI) is on a 6-year cycle and the next one is due in 2020.

**5. FISCAL IMPACT/REVENUE SOURCE**

Fiscal impact to this action will be \$ 464,599.

The revenue source for this motion is Buildings, Technology and Academics BTA IV.

Expenditure: ☒ One-time ☐ Annual ☐ Multi-Year ☐ N/A

Revenue: ☐ One-time ☐ Annual ☐ Multi-Year ☒ N/A

**6. COMMUNITY ENGAGEMENT**

With guidance from the District's Community Engagement tool, this action was determined to merit the following tier of community engagement:

☐ Not applicable

☒ Tier 1: Inform

☐ Tier 2: Consult/Involve

☐ Tier 3: Collaborate

The development of BTA V planning includes community engagement. However, the task of obtaining building condition information data serves to inform all stakeholders and parties of pertinent information. This information will be available to be shared in BTA V planning efforts in the future.

**7. EQUITY ANALYSIS**

The district's Racial Equity Analysis toolkit was utilized to guide the planning process for the BEX V Capital Levy, influencing community engagement methods, preparation of the 2018 update to the Facilities Master Plan, and ultimately the final proposed levy package. The Board's guiding principles stated that racial and educational equity should be an overarching principle for the BEX V Capital Levy planning in accordance with Board Policy 0030, Ensuring Educational and Racial Equity. This information was used in identifying the scope of work and the development of the Request for Proposal for this work. Data collected from this effort will be used to identify projects in future levies, and will allow BEX V projects to request SCAP funding. Projects identified for inclusion in the BTA V levy will ultimately improve conditions for all students in the affected schools. Improved building conditions create a better environment for learning and can provide facilities to better position students for academic success.

**8. STUDENT BENEFIT**

The recommendations in this action item support the projected need for adding capacity and providing excellent spaces for learning to the extent Capital solutions are available.

**9. WHY BOARD ACTION IS NECESSARY**

☒ Amount of contract initial value or contract amendment exceeds \$250,000 (Policy No. 6220)

☐ Amount of grant exceeds \$250,000 in a single fiscal year (Policy No. 6114)

☐ Adopting, amending, or repealing a Board policy

☐ Formally accepting the completion of a public works project and closing out the contract

☐ Legal requirement for the School Board to take action on this matter

☐ Board Policy No. \_\_\_\_\_, [TITLE], provides the Board shall approve this item

☐ Other: \_\_\_\_\_

**10. POLICY IMPLICATION**

Per Board Policy No. 6220, Procurement, all contracts for more than \$250,000 initial value, excluding sales tax and contingencies, and changes or amendments of more than \$250,000, excluding sales tax and contingencies, must be approved by the School Board. Policy 6901 requires the facilities master plan to be approved by the Board be based (in part) on an analysis

of the physical condition and functional adequacy of buildings. Per Policy No. 0030 all new policies, programs and procedures be developed using of the racial equity analysis tool.

**11. BOARD COMMITTEE RECOMMENDATION**

This motion was discussed at the Operations Committee meeting on March 12, 2020. The Committee reviewed moved the motion and the item forward with a recommendations for approval by the full Board.

**12. TIMELINE FOR IMPLEMENTATION**

Upon approval of this motion, the Superintendent will execute an agreement and a Notice to Proceed will be issued to Sazan Environmental Services.

**13. ATTACHMENTS**

- Contract K1379 ~~None~~



# Contract for Consulting Services

## District wide Building Condition Assessment and Educational Adequacy Assessment

Seattle Public Schools is committed to making its online information accessible and usable to all people, regardless of ability or technology. Meeting web accessibility guidelines and standards is an ongoing process that we are consistently working to improve.

While Seattle Public Schools endeavors to only post documents optimized for accessibility, due to the nature and complexity of some documents, an accessible version of the document may not be available. In these limited circumstances, the District will provide equally effective alternate access.

For questions and more information about this document, please contact the following:

Paul Cathcart  
Senior Facilities Planner, Capital Projects and Planning  
[pacathcart@seattleschools.org](mailto:pacathcart@seattleschools.org)

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**CONTRACT  
FOR  
CONSULTING SERVICES**

Owner: **Seattle School District No. 1,**

and

Consultant: Sazan Environmental  
Services

Tax I.D. #: (91-1893084)

**(District-wide Building Condition and  
Education Adequacy Assessment)**

Contract No. (**K1379** )

## CONSULTING SERVICES CONTRACT

This Agreement, Contract No. (**contract number**) made by and between Seattle School District No. 1, a Washington municipal corporation ("District" or "Owner"), and **Sazan Environmental Services** ("Consultant"). District and Consultant agree as follows:

### 1. SCOPE OF WORK AND SCHEDULE

- a. Consultant shall provide professional and related services as described in Exhibit A hereto, on the schedule set forth therein ("Services"). Consultant is authorized to proceed (check one):

☒  
☐

Upon receipt of this signed Agreement;  
On \_\_\_\_\_ 20\_\_.

- b. Unless modified by a change order, this contract shall be completed by *September 30, 2020* and the contract shall terminate upon such completion.

### 2. CONTRACT PRICE [CHECK ONE ONLY]

- a. ☐ District agrees to pay Consultant, on a time and expenses basis, a sum not to exceed: \_\_\_\_\_ (\$ \_\_\_\_\_) (the "Maximum Authorized Compensation") payable according to Consultant's schedule of fees and reimbursable expenses specified in Exhibit B hereto. Compensation will be paid only to the extent that Consultant presents documented evidence of fees earned and expenses incurred during the period for which payment is requested, and in no case shall the total compensation exceed the Maximum Authorized Compensation.  
**or**

- b. ☒ District agrees to pay Consultant a lump sum of Four Hundred Thirty Seven Two Hundred One Dollars (**\$464,599.00**) as full and complete compensation for all services hereto, exclusive of reimbursable expenses described in Exhibit B, if any. Compensation for reimbursables will be paid only to the extent that Consultant presents documented evidence of expenses incurred during the period for which payment is requested.

Consultant shall submit its invoices in the form and according to the schedule prescribed in the General Conditions, Exhibit C, to the address listed in paragraph 3. The amount paid shall constitute complete compensation for all costs and fees incurred, including any expenses for meals, travel, lodging and Washington State sales tax, if applicable. Additional services must be authorized in writing by District prior to performance. A W-9 form must be attached if Consultant is an individual.

### 3. COMMUNICATIONS

The District's representative for this contract is (**District Contact**). All correspondence, requests, notices and other communications to District, in relation to this Agreement, shall be in writing and shall be delivered to:

To the District: Mailing Address  
**Paul Cathcart**  
Senior Facilities Planner  
Seattle School District No. 1  
Mail Stop: **22-331**  
PO Box 34165  
Seattle, WA 98124-1165

To the Consultant:  
**Joel Davis**  
Managing Principal  
Sazan Environmental Services  
600 Stewart St.,  
Suite 1400  
Seattle, WA, 98101

Physical Location:  
2445 Third Avenue South  
Seattle, WA 98134

Either party may from time to time change such address by giving the other party notice of such change in accordance with the provisions of this Paragraph 3.

#### **4. CONSULTANT'S REPORTS**

Consultant shall provide reports as requested by District in a format proposed by Consultant and approved by District.

#### **5. PERSONNEL**

Consultant shall assign the personnel listed below to the performance of the Work and shall not (for so long as they remain in Consultant's employ) reassign or remove any of them without the prior written consent of District.

<b>Name</b>	<b>Firm</b>	<b>Role</b>
Joel Davis	Sazan Environmental Services	Principal in Charge
Astrid Santiago	Sazan Environmental Services	Project Manager
Lauri Strauss	Design2 Last	Civil, Structural, Architectural Assessments
Paul Dorn	Rolluda Architects	Civil, Structural, Architectural Assessments
Ato Apiafi	Ato Apiafi Architects	Civil, Structural, Architectural Assessments
David Huffman	David Huffman	Educational Adequacy - Elementary
Shane Doig	Sazan Environmental Services	Mechanical, Electrical, Plumbing Assessments
Kevin David	Sazan Environmental Services	Mechanical, Electrical, Plumbing Assessments
Sean Doyle	Sazan Environmental Services	Mechanical, Electrical, Plumbing Assessments
Bob Wolpert	Bob Wolpert	Educational Adequacy Assessment – Elementary
Ty Heim	Heim Dsign	Educational Adequacy Assessments – Middle
Johnny Hong	Integrus Architecture	Educational Adequacy Assessment - High
Andy Cluness	ARC Cost Group	Cost Estimating – BCA and ADA
Craig Stauffer	PCS Structural Solutions	Seismic Assessment
Brian Rezentes	Integrus Architecture	Civil, Structural, Architectural support
Charles Calvano	Integrus Architecture	Civil, Structural, Architectural support

#### **6. THIS AGREEMENT INCLUDES THE FOLLOWING ATTACHMENTS:**

<b>Exhibit</b>	<b>Topic</b>
A	Scope of Services and Schedule
B	Fees and Reimbursable Costs
C	General Conditions of Personal Services Contract (Short Form) revision date of April 18, 2016



Modifications and revisions, if any, to the General Conditions are made by the parties in Exhibit D, if included.

CONSULTANT:

DISTRICT:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Typed Name (Above)

Fred Podesta  
\_\_\_\_\_  
Typed Name (Above)

\_\_\_\_\_  
(ie; Principal, Director, etc.)  
Title

\_\_\_\_\_  
(Signing Authority)  
Title

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Date Signed

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Employer I.D. No. or Social Security No.

## SCOPE OF SERVICES AND SCHEDULE

The Scope of Work includes services required to provide consulting services for the scope of work as identified in RFP 11930, **Sazan Environmental Services** proposal dated 2/5/2020 less the work to be completed in contract K1380, Limited Building Condition Assessment. General scope of this project includes:

- Assessment of existing buildings including building envelopes and systems, site improvements, playgrounds
- Updating the Office of Superintendent of Public Instructions' of said buildings in the Information and Condition of Schools (ICOS)
- Cost estimates to address deficiencies identified in building component conditions
- Recommendations for new-in-lieu, replacement or modernization projects
- Development of database or electronic dashboard for building component conditions
- Condition assessment of 285 portables
- Photographs of all classrooms
- Production of reports on the findings of the assessments

The scope of **accessibility assessment** for this project is further defined as such:

During the FCA, the Contractor will also conduct rapid visual assessment regarding general accessibility to spaces around the school facility. This scope is intended to provide an abbreviated and general assessment of access to instructional and student spaces defined as:

- Parking to sidewalk (e.g. curb cut)
- Sidewalk from edge of site (i.e., excluding off-site, public right of way sidewalks) to reception (e.g. stairs/ramps/automatic door hardware)
- Reception to interior spaces (e.g. elevators, lifts to stage, ramps/stairs) noting any lack of access for students and staff to school program
- Interior to play areas/fields (e.g. stairs/ramps, bark borders, field curbs)

The Contractor is not responsible for taking any physical measurements during this assessment nor will accessibility within interior spaces be evaluated, such wheelchair access to sinks; nor is this scope intended to fulfill Federal 2010 Americans with Disabilities Act (ADA) Standards for Accessible Design and associated ADA Checklist for Existing Facilities.

General accessibility of the facility will be observed throughout the FCA review and will be captured as an "ADA" deficiency. Cost estimates to correct observed inaccessible situations will be provided on a rough order of magnitude.

The scope of the **learning environment assessment** is defined as such:

Sazan Environmental Services (SES) and Seattle Public Schools (SPS) will collaboratively update the original 2002 Educational Adequacy (EA) methodology to better reflect the current educational programs being planned and developed in SPS facilities. This update will be defined as the SPS 2020 Learning Environment Assessment (LEA) methodology.

### **LEA Project Phases:**

LEA services will be organized in the following four phases:

- Phase I – Preparation (i.e., including 2020 LEA methodology update)
- Phase II – Field Surveys
- Phase III – Analysis/Reporting
- Phase IV – Additional/Emergent Needs Services

### **Phase I – Preparation**

The 2020 LEA methodology is intended to generally reflect factors defined by OSPI in the School Facilities Manual, such as:

- ✓ Facility program

- ✓ Capacity
- ✓ Configuration and spatial relationships
- ✓ Program spaces and areas
- ✓ Adjacencies, circulation and accessibility
- ✓ Environment, health, security and safety
- ✓ Technology

SES will facilitate a workshop comprised of representatives of facilities and educational leadership staff, and potentially additional educational consultants to review current 2002 EA assessment factors and relative to new school program considerations such as:

- ✓ Learner-centered and designed to foster and support life-long learners;
- ✓ Spaces that support interdisciplinary, experiential and intergenerational learning;
- ✓ Environments that supports inquisitiveness, risk taking and innovation;
- ✓ Spaces designed to meet a range of student physiological needs;
- ✓ Spaces sized for personalized learning, collaboration, community facilitation and stewardship with a range of space sizes and types;
- ✓ Conceptualized into learning-scapes with distinctions of the types and modalities of spaces to facilitate educational goals;
- ✓ Flexible to allow for customizable space in terms of daily change and facility conversions;
- ✓ Equity in program spaces (e.g., community assets for use by students, parents, district partners and the community at large);
- ✓ Use of portables in providing education space.

Following the LEA Workshops, SES will:

- ✓ consolidate findings and recommendations to produce a Draft Update of the current 2002 EA evaluation criteria categories (e.g. Capacity; Configuration; Environment) with revised or augmented evaluation criteria, (e.g. Health and Life Safety). This will create new benchmark performance for calculating relative LEA Indices for each facility.
- ✓ SPS will review and provide comments for the Draft Update.
- ✓ SES will incorporate comments.
- ✓ SES will develop an updated assessment instrument for use in the field.

SPS will provide three (elementary, middle, high) schools and associated education specifications to serve as new guiding benchmarks for comparative assessments. Program area take-offs of 5 priority program areas (e.g., Administration, Standard Classroom, Library, Multi-Purpose/Commons, Gym areas) will be completed for each facility and comparison with Guide Schools.

An online (e.g. SmartSheet), Pre-survey Questionnaire will be developed by SES. SPS will have a single review cycle by facilities and educational leadership stakeholders. SES will incorporate review comments and forward to SPS. SPS will distribute to each school site for input from local school administrators relative to specific program areas and evaluation criteria categories, including current space use of the school.

### **Phase II – Field Surveys**

LEA field surveys will be organized by elementary, middle and high school levels by multiple K12 facility specialists. LEA Assessors will briefly review the Pre-survey questionnaire and confirm space usage with local school administrators. The assessments will employ a 1-5 scoring system and use a matrix to rate each defined program area by each evaluation category.

### **Phase III – Analysis/Reporting**

The LEA assessment will generate educational adequacy scores for each facility. The LEA deliverables will be included in the LEA section of the overall report and include an executive summary of the LEA results; scope and methodology; key findings and recommendations; individual facility assessments, including scores and composite index score; and relative ranking of facilities by school types. A sample Draft LEA site report will be provided for SPS review and comment. SES will incorporate review comments and compile the 2020 Portfolio LEA Report. The LEA outcome is intended to support data driven decision making to execute the long-range facilities master plan and future Building Excellence capital programs.

### **Phase IV – Additional/Emergent Needs Services**

No Additional/Emergent Needs Services are contracted at this time, but may be collaboratively considered by both SPS and SES during the progression of services.



## Schedule

1	<b>PHASE I - PREPARATION</b>	1
2	<b>SELECTION PROCESS</b>	<b>Mon 3/13/17 Wed</b>
3	Proposal Submission	<b>2/5/20 Wed 2/5/20</b>
4	Consultant Proposal Reviews	Thu 2/6/20 Thu
5	Interviews	2/13/20 Fri 2/14/20
6	Notification to selected firm	Mon 2/17/20 Wed
7	Scoping Meeting/Contract Negotiation	2/26/20 Fri 2/28/20
8	Scope/Schedule Revisions	Wed 4/8/20 Thu
9	SPS Reviews-SB Approval	4/9/20 <b>Mon</b>
10	NTP	<b>3/13/17 Mon</b>
11	SubContracting & Team Coordination	3/13/17
12	<b>FCA Prep</b>	Mon 3/13/17 Fri
13	M&O Pre-Survey Questionnaire Prep/Distribution/Compilation	3/17/17 Wed
14	M&O Workshop Prep (SPS)	3/22/17 Thu 4/9/20
15	M&O Workshops (SPS)	Thu 4/30/20 Mon
16	Compile M&O Anecdotal Info for Surveys	5/4/20 Mon 5/4/20
17	Develop ADA Assessment Criteria	Tue 5/12/20 <b>Thu</b>
18	Portables Assessment Criteria	<b>4/9/20 Thu 4/9/20</b>
19	Classroom Photograph Prep	Thu 4/16/20 Mon
20	Health, Life-Safety Assessment Prep	4/27/20 Wed
21	FCA FIELD FORMS & BINDERS	4/29/20 Mon
22	<b>LEA Prep</b>	5/18/20 Wed
23	LEA Workshop Prep	5/20/20 Mon
24	Ed Spec Review	5/25/20 <b>Thu 4/9/20</b>
25	LEA Evaluation Criteria Workshop	Thu 4/9/20 Wed
26	Draft EA Assessment Evaluation Criteria	5/6/20 Thu 5/14/20
27	LEA Assessment Evaluation Review & Final	<b>Wed 5/13/20 Wed</b>
28	LEA Form Revisions	<b>5/13/20 Wed</b>
29	LEA Questionnaires to Principals	5/13/20 Thu 5/14/20
30	<b>ICOS Prep</b>	Wed 5/20/20 Wed
31	ICOS BCA Data Migration	5/20/20 <b>Tue</b>
32	ICOS BCA Setup	<b>5/26/20 Tue</b>
33	BCA Form Updates	<b>5/26/20 Tue</b>
34	<b>PHASE II - FCA/LEA FIELD SURVEYS</b>	5/26/20 Wed
35	<b>FCA SURVEYS</b>	5/27/20 Tue 6/2/20
36	<b>FCA Surveyor Training/Orientation</b>	Tue 6/2/20 Tue
37	Montlake ES	6/2/20 <b>Tue 6/2/20</b>
38	Montlake ES Training Data Review	Tue 6/2/20 Wed
39	<b>SPS North Facilities</b>	7/29/20 Mon
40	<b>SPS Central Facilities</b>	8/17/20 Thu 9/10/20
41	<b>SPS South Facilities</b>	Wed 7/29/20 Thu
42	<b>LEA SURVEYS</b>	9/17/20
43	<b>LEA Surveyor Training/Orientation</b>	Mon 9/21/20
44	Montlake ES	
45	Montlake ES Training Data Review	
46	<b>Elementary Facilities</b>	
47	<b>Middle School Facilities</b>	
48	<b>High School Facilities</b>	
49	<b>PHASE III - ANALYSIS/REPORTING</b>	
50	<b>ICOS APP REPORTING</b>	
51	Data QC	
52	ICOS BCA REPORTING	
53	COST / QC Reviews	
54	LEA Reviews	
55	Analysis	
56	FCA/LEA Reports	

## FEES AND REIMBURSABLE COSTS

CLIENT			Seattle Public Schools															
PROJECT			Seattle Public Schools FCA-LEA															
PROJECT #			A37-20006															
Prepared By:			Astrid Santiago, 3/20/2020															
PROPOSED SCOPE OF WORK			Managing Principal	PM	FCA Assistant	Admin/Projec t Coordinator	Cost Estimating	CSA - N	MEP - N	CSA - C	MEP - C	CSA - S	MEP - S	LEA Elem 1	LEA Elem 2	LEA Elem 3	LEA MS	LEA HS
PH I - PREPARATION/PM			66	76	102	20	0	0	0	0	0	0	0	0	0	0	0	0
PH II - Fieldwork			8	8	8	0	0	269	254	269	254	269	254	116	116	116	75	122
PH III - REPORTING			18	105	222	0	70	0	0	0	0	0	0	0	0	0	0	0
PH IV - ADDITIONAL SERVICES			0	0	100	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL HOURS			92	189	432	20	70	269	254	269	254	269	254	116	116	116	75	122
HOURLY RATES			\$235	\$135	\$94	\$131	\$155	\$201	\$185	\$144	\$180	\$144	\$160	\$225	\$144	\$115	\$173	\$173
FEES			\$21,620	\$25,515	\$40,616	\$2,620	\$10,868	\$54,181	\$46,969	\$38,701	\$45,700	\$38,701	\$40,622	\$26,188	\$16,731	\$13,385	\$12,880	\$21,103
TOTAL FEES																		
Professional Services			\$	456,398														
Expenses			\$	8,201														
Contingency			\$	-														
Total LS Fees			\$	464,599														

## SERVICES CONTRACT

### GENERAL CONDITIONS (SHORT FORM)

#### ARTICLE 1 - CONSULTANT'S SERVICES AND RESPONSIBILITIES

1.1 Services. Consultant shall furnish all personnel, equipment and materials for the performance of all services under this Agreement. Such services, together with all drawings, specifications, materials, information, property, and other items provided or to be provided to District under this Agreement, are sometimes collectively referred to herein as the “Services.”

1.2 Manner of Performance. Consultant's Services shall be performed with the degree of care and diligence ordinarily exercised under similar circumstances in the applicable disciplines and as expeditiously as is consistent with such standards of professional skill and care and the orderly progress of the Services. At the time of performance, Consultant shall be properly licensed, equipped, organized and financed to perform the Services.

1.3 District's Representatives. District may designate one or more individuals or firms as its representative for administration of this contract. If a representative is assigned by District, it shall not have authority to assign additional Services or to reduce the Services to be performed by the Consultant under this contract.

1.4 Correction of Noncompliances. Consultant shall, at no cost to District, promptly and satisfactorily correct any Services found to be defective or not in compliance with the requirements of this Agreement or the requirements of any governmental authority, law, regulations or ordinances. If the Consultant fails to initiate corrections within fifteen (15) days of receipt of written notice from the District, the District may do so, by contract or otherwise, and recover (e.g., by offset against the compensation otherwise payable under this contract) from the Consultant the cost it incurred. The obligations of the Consultant to correct nonconforming Services shall not in any way limit any other obligations of the Consultant. The District's right to make corrections and charge the Consultant for them is in addition to any other rights and remedies available to the District under this Agreement or otherwise by law and shall in no event be construed or interpreted as obligating the District to make any correction of defective or nonconforming Services.

1.5 Consultant's Personnel. All personnel employed by Consultant engaged in the Services and Services shall be fully qualified and shall be authorized under applicable federal, state, and local law to perform such Services and Services. Consultant shall, if so requested by District, remove from the performance of the Services any person District reasonably deems incompetent. Failure of District to so object shall not relieve Consultant of responsibility for such person. If any personnel are reassigned or replaced by Consultant upon District's request, Consultant shall replace them with personnel approved by District.

1.6 Consultant Employee Background. Pursuant to RCW 28A.400.330, Consultant shall prohibit from providing Services at a public school where there may be contact with children, any employee of Consultant who has pled guilty to or been convicted of any felony crime involving the physical neglect of a child under Chapter 9A.42 RCW, the physical injury or death of a child under Chapter 9A.32 or 9A.36 RCW (except motor vehicle violations under Chapter 46.61 RCW), sexual exploitation of a child under Chapter 9.68A RCW, sexual offenses under Chapter 9A.44 RCW where a minor is the victim, promoting prostitution of a minor under Chapter 9A.88 RCW, the sale or purchase of a minor child under RCW 9A.64.030, or violation of similar laws of another jurisdiction. Failure to comply with this section shall be grounds for District to immediately terminate the contract for cause.

#### 1.7 Compliance With Laws

1.7.1 General. Consultant shall comply, and be certain that its Services comply, with all applicable laws, ordinances, regulations, resolutions, licenses of record, permits of record, and other requirements applicable to the Services, in effect at the time of performance of the Services and as interpreted by cognizant authorities, including but not limited to those related to the Americans with Disabilities Act and worker and site safety laws and regulations. Consultant shall furnish such documents as may be required to effect or evidence such compliance. All

laws, ordinances, regulations, and resolutions required to be incorporated in agreements of this character are incorporated in this Agreement by this reference.

#### 1.7.2 Nondiscrimination.

A. Applicable state laws concerning prevailing wages, hours, workers' compensation and other conditions of employment are called to the attention of bidders for their compliance. Bidder shall include in the bid any filing fees required to comply with applicable labor laws.

B. During the term of this Agreement, Consultant shall comply with applicable local, state and federal laws prohibiting discrimination with regard to race, creed, color, national origin, sex, sexual orientation, marital status, age or the presence of any sensory, mental or physical handicap.

C. Any consultant or contractor who is in violation of these requirements, or an applicable nondiscrimination program shall be barred forthwith from receiving awards of any purchase order from Seattle School District No. 1 or shall be subject to other legal action or contract cancellation unless satisfactory showing is made that discriminatory practices have terminated, and that reoccurrence of such acts is unlikely. This includes compliance with Section 503 and 504 of the Vocational Rehabilitation Act of 1973 and Sections 2012 and 2014 of the Vietnam Era Veterans Readjustment Act of 1974.

#### 1.7.3 Debarment

A. Consultant, by accepting the contract, warrants that it is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions (defined as not being eligible to receive federal funds) by any local, state or federal department or agency. Consultant also acknowledges they are not debarred under School Board Policy No. 6973 in contracting with the District currently or on future contracts.

### **ARTICLE 2 - PAYMENTS TO CONSULTANT**

2.1 The compensation shall be made no more frequently than monthly and if paid on a lump sum basis shall be in proportion to the Services performed. Each of Consultant's invoices shall set forth in a detailed and clear manner a complete description of the Services covered thereby, on a form substantially similar to that customarily used by District and shall be supported by such receipts, documents, and other information as District may reasonably request. The invoice shall include separate listings of Services for particular schools or programs, if requested by the District. District shall pay each of Consultant's invoices within thirty (30) days after District's receipt, provided that all required documentation is included and accurate.

### **ARTICLE 3 - REIMBURSABLE EXPENSES**

3.1 Reimbursable Expenses are in addition to the hourly rates for Services and include actual reasonable expenditures made by Consultant and Consultant's employees and subconsultants in the interest of the Project for the expenses listed in the following subparagraphs. Consultant represents that Schedule B sets forth Consultant's best estimate of the Reimbursable Expenses under this Agreement. Notwithstanding any other provision of this Agreement to the contrary, District shall not be obligated to pay Consultant, and Consultant shall not invoice District for, any Reimbursable Expenses which exceed Schedule B, unless authorized by a budget approved in writing by District. District hereby approves the attached schedule as an initial budget for the Reimbursable Expenses. Consultant shall immediately notify District if, in Consultant's best judgment, the then current estimate of the Reimbursable Expenses exceeds the approved budget therefor. Travel expenses are not Reimbursable Expenses, provided, however, that travel more than 75 miles from the site of the Services and approved in writing by the District is a Reimbursable Expense at the Internal Revenue Service allowed rate.

### **ARTICLE 4 - CONSULTANT'S ACCOUNTING RECORDS**

4.1 The Consultant's records of performance of Services shall at all times be subject to review by and the approval of District, but the making of (or failure or delay in making) such review or approval shall not



relieve Consultant of responsibility for performance of the Services in accordance with this Agreement. Records of Reimbursable Expenses shall be kept in accordance with generally accepted accounting principles.

4.2 Consultant shall promptly furnish District with such information related to the Services as may be requested by District. Until the expiration of three (3) years after final payment of the compensation payable under this Agreement, Consultant shall provide District access to (and District shall have the right to examine, audit and copy) all of Consultant's books, documents, papers and records which are related to the Services or this Agreement. Consultant agrees to provide reasonable cooperation with any inquiry by either the District or State Auditor relating to the performance of the contract. Failure to cooperate may be cause for debarment from award of future contracts and shall act as a waiver of any claim for any further compensation under this contract.

## **ARTICLE 5 - DISTRICT OWNERSHIP AND USE OF DOCUMENTS**

5.1 **District Ownership.** All drawings, specifications, materials, information, property and other items obtained or developed in connection with the Services or through the Reimbursable Expenses (including, but not limited to, documents, designs, drawings, plans, specifications, calculations, maps, sketches, notes, reports, data, estimates, reproductions, renderings, models, mock-ups, completed Services and Services in progress), together with all rights associated with ownership of such items (such as copyright, patent, trade secret and other proprietary rights), shall become the property of District when so obtained or developed or when such expense is incurred, as the case may be, whether or not delivered to District. Consultant shall deliver such items, together with all materials, information, property and other items furnished by District or the cost of which is included in the Reimbursable Expenses, to District upon request and in any event upon the completion, termination or cancellation of this Agreement. However, Consultant may at its own expense retain copies of any such items for its own records or for use in the furtherance of its professional knowledge.

5.2 **License.** District shall have a permanent, assignable, nonexclusive, royalty-free license and right to use all concepts, methods, processes, products, writings and other items (whether or not copyrightable or patentable) developed or first reduced to practice in the performance of the Services or otherwise whether by Consultant, any of its subconsultants, or any employee(s) of Consultant in connection with this Agreement. District shall hold Consultant or its subconsultants harmless for District's reuse of documents on a project other than this Project unless the Consultant is retained by the District for such other Project.

5.3 **Nondisclosure.** Consultant shall not, without the prior written consent of District, disclose to third parties any information obtained in connection with the Services unless: (a) the information is known to Consultant prior to obtaining the same directly or indirectly from District or in connection with the Services; (b) the information is in the public domain at the time of disclosure by Consultant; or (c) the information is obtained by Consultant from a third party who did not obtain the same directly or indirectly from District or in connection with the Services. If so requested by District, Consultant shall obtain from its employees, subconsultants and their respective employees nondisclosure agreements in the form and content satisfactory to District. Submission or distribution to meet official regulatory requirements or for other purposes in connection with the activity for which the Services were rendered is not to be construed as publication in derogation of District's or Consultant's rights.

## **ARTICLE 6 - RELEASE, INDEMNIFICATION AND HOLD HARMLESS**

6.1 **Release and Indemnification.** Consultant releases and shall indemnify and hold harmless District, its successors and assigns, and the directors, officers, employees and agents of District and their successors and assigns (collectively, the "Indemnitees") from all claims, losses, harm, costs, liabilities, damages and expenses (including, but not limited to, reasonable attorneys' fees incurred on such claims and in proving the right to indemnification) relating to the services arising (whether before or after completion of the Services) out of any act, error or omission of any of the following: Consultant; Consultant's subconsultants of any tier; the directors, officers, employees or agents of Consultant or any of its subconsultants of any tier; or anyone acting on Consultant's behalf in connection with the Services or this Agreement ("Indemnitors"). However, to the extent that such claims, losses, harm, costs, liabilities, damages and expenses are caused by or are resulting from the concurrent negligence of (i) the Indemnitees or the indemnitees' agents or employees, and (ii) the Indemnitor or the indemnitors' agents or employees, this indemnity obligation is enforceable only to the extent of the Indemnitors' negligence. Consultant also shall not be required to so indemnify any of the Indemnitees against liability or damages caused by or resulting

from the sole negligence of the Indemnitees. The indemnification obligation under this paragraph shall not be affected by any limitation on the amount or type of damages, compensation or benefits payable by or for Consultant or any subconsultant under any worker's compensation act, including Title 51, RCW, any disability benefit acts, or any other employee benefit acts. Consultant and any subconsultant hereby waive, for themselves and their successors, any right to claim such limitation as a defense, set off, or other reduction of rights to indemnification under this paragraph. **Consultant further agrees that this waiver has been mutually negotiated by the parties.**

6.2 Workers' Compensation. As to the Indemnitees identified above only, Consultant expressly waives any immunity or limitations (e.g., on the type or amount of damages, compensation, benefits or liability payable by Consultant) that might otherwise be afforded under any industrial insurance, Workers' compensation, disability benefit or similar law, rule, regulation or order of any governmental authority having jurisdiction (including, but not limited to, the Washington Industrial Act, Title 51 of the Revised Code of Washington). By executing this Agreement, Consultant acknowledges that the foregoing waiver has been mutually negotiated by the parties.

6.3 Patent; Copyright. Consultant releases and shall defend, indemnify and hold harmless the Indemnitees from all claims, losses, harm, costs, liabilities, damages, expenses (including, but not limited to, reasonable attorneys' fees) and royalties arising (whether before or after completion of the Services) out of or in connection with any claim, action, suit or proceeding based upon infringement of any patent, copyright, trade secret or other proprietary right or upon the wrongful use of any confidential or proprietary concept, method, process, product, writing, information or other item and arising out of or in connection with performance of the Services or the use or intended use of any of the Services. Further, if any of the Services or any use or intended use of the Services constitutes an infringement of any patent, copyright, trade secret or other proprietary right or the wrongful use of any confidential or proprietary concept, method, process, product, writing, information or other item, Consultant shall at its expense either procure for the Indemnitees the right to use the infringing item, replace the infringing item with a substantially equal but noninfringing item or modify the infringing item so that it becomes noninfringing; provided, however, that this paragraph 6.3 does not apply to any claim, action, suit or proceeding based upon infringement which is related to any materials or equipment designated solely by District for use by the District and not designed by the Consultant.

## **ARTICLE 7 - INSURANCE**

7.1 Workers' Compensation; Employer's Liability Insurance. Consultant shall, at its sole expense, require that, with respect to all persons performing the Services, Consultant and its subconsultants maintain in effect at all times during performance of the Services coverage or insurance in accordance with the applicable laws relating to Workers' compensation and employer's liability insurance (including, but not limited to, the Washington Industrial Insurance Act and the laws of the state in which any such person was hired).

7.2 Liability Insurance. In addition, Consultant shall, at its sole expense, maintain in effect at all times during performance of the Services and for a period of at least three (3) years after completion thereof such insurance as will protect Consultant and the District from all claims, losses, harm, costs, liabilities, damages and expenses arising out of property damage or personal injury (including death) that may occur in connection with performance of the Services. Consultant shall promptly furnish to District upon request certificates of insurance and other evidence (such as copies of insurance policies and Certificates of Compliance issued by the Washington State Department of Labor and Industries) of the insurance required under this Article 7. Without limitation of the foregoing, such insurance shall include personal injury (including death) and property damage combined insurance with limits of \$1,000,000 CSL each occurrence and annual aggregate for the following coverages:

- (a) Commercial general liability/general (including premises operations, completed operations, blanket/contractual, broad form property damage and contractor's protective).
- (b) Commercial auto liability (including owned, hired and nonowned).
- (c) Professional liability (E & O)

7.3 Additional Insured; Subrogation. Any policy of insurance required under this Article shall name the District, its employees, directors, officers and agents ("Indemnitees") additional insureds and contain a

waiver of the insurer's right of subrogation against the Indemnitees. To the full extent permitted by its policies, Consultant hereby waives such rights of subrogation. Such policies shall not be terminated or canceled without giving forty-five (45) days' advance written notice thereof to District.

## **ARTICLE 8 - CHANGES**

8.1 Notice. District may at any time, by written notice thereof to Consultant, make changes in the Services to be performed under this Agreement (including, but not limited to, additions to or deletions from any Services, suspension of performance, and changes in the schedule and location of performance). Consultant shall, within ten (10) days after receipt of notice of any change which Consultant believes to be outside the scope of Services, give District written notice of such belief, otherwise the change shall be deemed to be within the scope of Services.

8.2 Adjustment. If any change under paragraph 8.1 causes an increase or decrease in the cost of or the time required for performance of the Services, an equitable adjustment in the compensation and/or schedule under this Agreement shall be made to reflect such increase or decrease and this Agreement shall be modified in writing accordingly, and only so long as Consultant provides timely notice as required by Section 8.1. Such equitable adjustment shall constitute full compensation to Consultant for such change.

## **ARTICLE 9 - TERMINATION OF THIS AGREEMENT**

### 9.1 Termination of Agreement by District for Cause.

9.1.1 If Consultant shall fail to fulfill in a timely and proper manner its obligations under this Agreement, or if Consultant shall violate any of the provisions of this Agreement, or if Consultant becomes insolvent or the subject of any proceeding under bankruptcy, insolvency or receivership law or makes an assignment for the benefit of creditors, District shall thereupon have the right to terminate this Agreement by giving written notice of such termination and specifying the effective date thereof as a certain date at least seven (7) days after the notice, during which period Consultant shall have the right to cure the default.

9.1.2 Whether or not this Agreement is so terminated, Consultant shall be liable to District for any damage or loss resulting from such failure or violation by Consultant described in subparagraph 9.1.1, including, but not limited to, costs in addition to those agreed to herein for prosecuting Services to completion and delay damages paid or incurred by District. The rights and remedies of District provided by this paragraph are cumulative with and in addition to any other rights and remedies provided by law or this Agreement.

9.1.3 District shall be liable to Consultant for Consultant's just and equitable compensation for any satisfactory services completed, but in no event shall this compensation exceed the percentage of total services satisfactorily completed at the time of termination times the total compensation payable under this Agreement less any damage or loss described in Section 9.1.2. District may withhold payments to Consultant equal to any claim made in writing by District for the purpose of set-off until such time as the exact amount of damages due District from Consultant is determined. In no event shall District be liable for any consequential or incidental damages, including, but not limited to, loss of profit on this or other projects or of reputation incurred by Consultant as a result of such termination. If District purports to terminate all or a part of this Agreement for cause, and it is determined that insufficient cause existed, such termination shall be deemed to have been a termination for convenience of District pursuant to paragraph 9.2, and the rights of the parties shall be determined accordingly.

9.2 Termination for Convenience by District. District may, at its option, terminate all or a portion of the services not then performed under this Agreement at any time by so notifying Consultant in writing. In that event, all finished or unfinished documents and other materials as described above shall, at the option of District, become its property upon compensation therefor in accordance with this Agreement, and District shall indemnify and hold harmless Consultant and its agents and employees from any claims arising from District's subsequent use of such documents and other materials, except to the extent Consultant is solely or concurrently negligent. If the Agreement is terminated by District as provided herein, Consultant's compensation for the Services shall be (i) that portion of the compensation for services properly performed prior to termination, and (ii) proper compensation for Reimbursable Expenses. District shall not be liable for any consequential or incidental damages, including, but not

limited to, loss of profits on this or other projects or of reputation incurred by Consultant as a result of such termination.

## **ARTICLE 10 - MISCELLANEOUS**

10.1 **Time.** Time is of the essence with regard to performance of this Agreement.

10.2 **Subcontracting.** Except for any services to be performed by subconsultants specified in Exhibit A, Consultant shall not (by contract, operation of law or otherwise) delegate or subcontract performance of any Services to any other person or entity without the prior written consent of District.

10.3 **Independent Contractor.** Consultant shall at all times be an independent contractor and not an agent or representative of District with regard to performance of the Services as authorized by this Agreement. Consultant shall not represent that it is, or hold itself out as, an agent or representative of District. The Consultant shall perform the Services in accordance with its own methods and in an orderly and professional manner. The Consultant is not authorized on behalf of the District to enter into any agreements, to waive or modify any provisions of the District's contracts with third parties, to authorize payment on behalf of the District, or to receive or accept contractual notices, to accept or approve any change in the price or time of contract on behalf of the District, or to otherwise bind the District by its actions. The District shall not be responsible for fringe benefits, withholding, paying of any taxes on behalf of the Consultant or its employees or agents, or remuneration above the amount stipulated in this Agreement.

10.4 **Nonwaiver.** The failure of either party to insist upon or enforce strict performance by the other party of any of the provisions of this Agreement or to exercise any rights under this Agreement shall not be construed as a waiver or relinquishment to any extent of its rights to assert or rely upon any such provisions or rights in that or any other instance.

10.5 **Assignment.** Neither District nor Consultant shall assign, sublet or transfer any interest in this Agreement without the written consent of the other.

10.6 **Entire Agreement.** This Agreement represents the entire and integrated agreement between District and Consultant and supersedes all prior negotiations, representations or agreements, either written or oral. This Agreement may be amended only by written instrument signed by both District and Consultant.

10.7 **Applicable Law; Venue.** This Agreement shall be interpreted, construed, and enforced in all respects in accordance with the laws of the State of Washington without regard to its choice of law provisions. Venue in any litigation shall be in King County, Washington.

10.8 **Conflicts.** The Consultant has no interest and shall not acquire any interest, direct or indirect, that would conflict in any manner with the performance of the Services. The Consultant will not employ any person in the performance of this Agreement having any such interest.

10.9 **Mediation.** Any dispute arising out of or relating to this Agreement, or the breach thereof, shall first be subject to mediation under the Construction Mediation Rules of the American Arbitration Association ("AAA"). To initiate the mediation process, a party shall submit a written mediation request to the other party. If the parties are unable to agree to a mediator within thirty (30) days after the receipt of the written request for mediation, either party may submit a request for mediation to the AAA. The Consultant may not bring litigation unless it has been properly addressed in the above dispute resolution procedure.



SEATTLE PUBLIC SCHOOLS

RFP No. RFP11930

Consultant Services for  
Building Condition Assessment & Educational Adequacy

February 5, 2020

Σ Ä Z Ä N  
Environmental Services

600 Stewart Street, Suite 1400  
Seattle, Washington 98101  
(206) 267-1700 / (206) 267-1701 fax

[www.sazan.com/ses](http://www.sazan.com/ses)





## COVER LETTER

February 5, 2020

Nancy Milgate, Contracting Services  
Seattle Public Schools  
2445 Third Avenue South  
Seattle, Washington 98134

SUBJECT: Sazan Environmental Services - SOQ for RFP11930  
Consultant Services for Building Condition Assessment (BCA) & Educational Adequacy (EA)

Dear Ms. Milgate and Review Committee:

I'm thrilled with the opportunity to assist the Seattle Public Schools (SPS) once again in updating your asset management program. **Sazan Environmental Services (SES)** provides Building and Facility Condition Assessments for school districts, government agencies, and private clients to help them optimize building environments and make data driven decisions necessary to support proactive long-range facility masterplans.

As Managing Principal, I will actively lead the SES team and SPS will benefit from my more than 20 years of experience tailoring, managing, and delivering BCA services. While employed at a previous firm, I worked closely with SPS to develop the initial BCA/EA process in 2002 and then managed each successive update in 2006, 2009, and 2014. This knowledge of your facilities, staff, and district procedures will confirm quality and consistency while maximizing efficiencies to save time and money.

With a firm understanding of BCA and EA processes and methodology, SPS can be confident in the successful delivery of that update and the ability to support the new enhanced services and deliverables requested by SPS.

SES also specializes in EA assessments and has recently completed EA studies for the North Kitsap, Tacoma, and Bellevue School Districts. In summary, we offer you the following advantages:

- Experienced project manager, Astrid Santiago, who has helped deliver both BCA and EA services.
- A local, Seattle-based firm with combined experience of more than 30 million square feet of assessments.
- BCA-certified staff to conduct field work in support of Chapter 1 of the Study and Survey and/or annual Asset Preservation Program Requirements.
- Our services and final reports provide additional opportunities for you with enhanced BCA options to maximize quality data and visualizations for use in future BEX/BTA programs.

As you review our proposal, you will find that we also understand the bigger picture and know condition assessments go beyond just collecting field data. Thank you for your time and consideration. My team and I look forward to continue working with you again and contributing towards the successful planning and budgeting of SPS' future BEX and BTA programs.

Sincerely,

**Sazan Environmental Services**



**Joel Davis, MA, MBA**

Managing Principal, BCA Project Manager/Principal-in-Charge  
(206) 576-7282, jdavis@sazan.com

**REQUEST FOR PROPOSAL NO. RFP11930****PROPOSAL CERTIFICATION FORM**

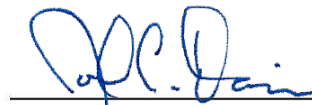
TO: Nancy Milgate, Contracting Services Manager

The undersigned provider hereby certifies as follows:

1. I read the Seattle School District's Request for Proposal No. RFP11930 and the following Addenda and to the best of my knowledge I complied with the mandatory requirements stated herein:

Addenda Number	Issue Date
<u>1</u>	<u>Jan 14, 2020</u>
<u>2</u>	<u>Jan 29, 2020</u>
<u> </u>	<u> </u>

2. I had the opportunity to ask questions regarding the Request for Proposal, and that if such questions have been asked; they have been answered by the District.
3. That the proposer's response is valid for 90 days.

Dated at Seattle, WA, this 4th of February 2020.
  
 (Signature)
Joel C. Davis, MA, MBA

(Print Name)

Säzän Environmental Services

(Company Name)

600 Stewart Street, Suite 1400

(Address)

Seattle

(City)

Washington

(State)

98101

(Zip)

Managing Principal

(Title)

JDavis@sazan.com

(Email Address)

(206) 576-7282

(Telephone Number)

(206) 267-1701

(Fax Number)

603-340-018

(UBI Number)



## 2. TABLE OF CONTENTS

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### 3. EXECUTIVE SUMMARY





**Säzän Environmental Services (SES)** was founded to help facility owners optimize building performance. Our work focuses on encompassing the entire facility life cycle, with a goal of helping clients understand the total cost of ownership when planning facilities. Our Building Condition Assessment (BCA) experience includes quantitative, cost-based assessments that facilitate proactive asset management strategies that support long-range facility master planning.

#### The Most-Experienced Project Manager and Commitment to Seattle Public Schools

Our Managing Principal, **Joel Davis**, is a certified BCA in Consultant in WA and OR with more than 20 years of experience in building optimization services. As a long-standing member of the OSPI Technical Advisory Committee, he is versed in the legislative and educational funding issues affecting policies, planning, and management.

- Seattle Public Schools (SPS) has been Joel's #1 client for more than two decades.
- He helped develop and has managed the past four major district-wide building condition assessments in 2002, 2006, 2009, and 2014, leading his previous firm.
- This longstanding experience and development of the Owner's Project Requirements (OPR) documentation, provides unique knowledge of the SPS facilities, procedures, and working relationships with SPS staff.

## 4 BCAs

2002 • 2006 • 2009 • 2014





---

## 30M+ SF

OF ASSESSMENTS

#### Recent SES Condition Assessment Projects

Since Joining SES in 2017, Joel has managed four major BCAs for local school districts.

	 <b>N. Thurston Public Schools</b> <b>2019</b>	 <b>N. Kitsap School District</b> <b>2018</b>	 <b>Tacoma Public Schools</b> <b>2017</b>	 <b>Bellevue School District</b> <b>2017</b>
# Buildings	9	14	138	81
Square Footage	456k	900k	4.67m	3.10m
ICOS Updates	Yes	Yes	Yes	Yes
EA Assessments	Yes	Yes	Yes	Yes

## 4. COMPANY PROFILE



### 4a. Identification of Firm

#### Sazan Environmental Services (SES)

600 Stewart Street, Suite 1400  
Seattle, Washington 98101

Phone ..... (206) 576-7282

Email contact ..... Joel Davis, jdavis@sazan.com

Date Established ..... October 19, 2013



Additional SES  
offices located in  
**Bremerton and  
Portland**

### 4b. Areas of Specialization of the Firm

1998

**Sazan Group, Inc.** is founded as a third-party review services and mechanical design firm to help facility owners achieve optimum building design and performance.

2013

Our commissioning and TAB services team branches off into a separate, independent company called **Sazan Environmental Services (SES)**.

2017

**Joel Davis takes leadership of SES** with a new market focus supporting K-12 school districts and their capital projects. We expand our services with building condition assessments, asset management, and sustainability consulting services to help achieve high-performing buildings.

2019

**We strengthen our focus to K-12 clients by hiring Shane Doig, CxA, CCP**, to manage our commissioning team. We can now examine a facility's entire life cycle to help clients understand the total cost of ownership when planning facilities with a suite of services that include: **Building and Facility Condition Assessments; Value Analysis and Value Engineering Studies; Constructability Reviews; Commissioning and Test-Adjust-Balance (TAB); and Sustainability Consulting, including LEED certification, net-zero, renewable energy, and net-zero carbon solutions.**

2020

**SES expands to Portland with Dan Tredow, PE**, as our principal to provide Asset Management, BCA certified, and Owner Representative services.

### 4c. Total Size and Breakdown of Firm Personnel



Managing Principal/BCA Team Leader ..... 1

BCA Project Manager ..... 1

Owner/President ..... 1

Principal ..... 2

VE/CR/Sustainability Consulting Staff ..... 3

Commissioning and TAB Staff ..... 5

Administrative Staff ..... 2

**Total Employees ..... 15**

## 5. PROJECT EXPERIENCE AND PAST PERFORMANCE



### K-12 Building Condition Assessment Experience

We have 5 BCA Certified staff by the Office of the Superintendent of Public Instruction and conduct field work in support of Chapter 1 of the Study and Survey and/or annual Asset Preservation Program requirements. Our experience is distinguished with quantitative, cost-based condition assessments that facilitate more proactive asset management strategies to support long-range facility master planning and bond planning. Our Principal, Joel Davis, and BCA Project Manager, Astrid Santiago, has scoped and managed the following condition assessments.



**Number of Facilities**  
9 buildings on 6 sites

**SF Assessed**  
456,314 square feet

**Säzän Staff**  
Joel Davis, PIC  
Sam Wright, PM  
Astrid Santiago, Data  
Analyst

### Project 1: North Thurston Public Schools, Building Condition Assessments

SES performed a Facility Cost Analysis for six schools identified by North Thurston Public Schools (NTPS) as Priority 1 facilities, due to their eligibility for state funding.

- Scope included conducting operations and maintenance workshops with District maintenance staff and conducting field visits to provide independent evaluation of the facilities' OSPI Information and Condition of Schools (ICOS) condition scores.
- Additionally, the FCA team provided a list of recommendations and cost estimates for building and site security and programmatic upgrades to enhance the learning environments at each facility.
- Our FCA provided insight into the condition of all Priority 1 schools by building component, quantified the costs to repair or replace those components, and estimated when the work should optimally be scheduled.
- The resulting report provided NTPS with a rough order of magnitude maintenance schedule and budget extending over 15 years, enabling the Construction and Design Department and the Facilities Committee to make informed decisions about procuring and allocating funding.
- SES facilitated the Facility Advisory Committee (FAC) workshops scheduled from September 2018 to September 2019.

### Deliverables Similar to RFP11930

- ☒ Update to previous assessment study
- ☒ Cost estimates to update deficiencies
- ☒ Database integration for future planning

### Initial budget and final cost/meeting deadlines

The SES contract was \$136,900 starting June 2018 with all BCA reports delivered by 2019. All deadlines were met and all deliverables were produced within the contract amount.

## 5. PROJECT EXPERIENCE AND PAST PERFORMANCE



### Number of Facilities

14 buildings on 11 sites

### SF Assessed

900,049 square feet

### Säzän Staff

Joel Davis, PIC  
Astrid Santiago, PM  
and Data Analyst

### Project 2: North Kitsap School District, BCA and Learning Environment Assessments

SES performed a district-wide BCA and Learning Environment Assessment for North Kitsap School District (NKSD) buildings and components.

- Scope included FCA data and costs, ICOS data, and assessing learning and support facilities programs.
- Assessed components included roofs, HVAC and electrical systems, and elevators.
- Evaluated remaining life and schedule replacements.
- Developed a replacement plan and schedule, including cost estimates
- Incorporated collected data into the existing NKSD database and OSPI Asset Preservation Program and Information and Condition of Schools System (ICOS).
- Area Analysis and drawing updates.

### Deliverables Similar to RFP11930

- ☒ Update to previous assessment study
- ☒ Cost estimates to update deficiencies
- ☒ Educational Adequacy assessments
- ☒ Database integration for future planning
- ☒ Drawing updates

### Initial budget and final cost/meeting deadlines

The SES contract was \$203,000 (\$158,000 for FCA and \$45,000 for LEA) with all reports delivered by May 2018. All deadlines were met and all deliverables were produced within the contract amount. ICOS data entry was completed soon after.



### Number of Facilities

138 buildings  
on 55 sites

### SF Assessed

4.67 million square feet

### Säzän Staff

Joel Davis, PIC  
Astrid Santiago, PM  
and Data Analyst

### Project 3: Tacoma Public Schools, BCA and Learning Environment Assessments

SES conducted a thorough BCA and analysis of all facilities, grounds, and structures of 138 district facilities. Scope included reviewing and developing an asset inventory that was migrated to the District's CMMS system.

- Assessed building and components conditions, annual maintenance costs, and the timing and cost of building component maintenance and replacement.
- Enhanced BCA options identified opportunities for energy conservation measures and voluntary ADA and seismic code upgrades.
- LEA assessments focused on three primary criteria: capacity, configuration, and environment to help support the District's long-range facility master plan.

### Deliverables Similar to RFP11930

- ☒ Update to previous assessment study
- ☒ Cost estimates to update deficiencies
- ☒ Educational Adequacy assessments
- ☒ Learning Environment Assessments (LEA)
- ☒ Database integration for future planning

### Initial budget and final cost/meeting deadlines

The SES contract was \$417,805 with all work and reports delivered by December 2017. All deadlines were met and all deliverables were produced within the contract amount.

## 5. PROJECT EXPERIENCE AND PAST PERFORMANCE



### Number of Facilities

81 buildings on 30 sites

### SF Assessed

3.1 million square feet

### Project 4: Bellevue School District, Building Condition and EA Assessment

SES assisted the District in preparing a Building Condition Assessment Study and Survey report. The assessments included school facilities requiring annual reporting under the State's Asset Preservation Program.

- Facilitated an unprecedented four-week schedule for completing the District's certified Asset Preservation Program report and school board resolutions.
- BCAs were completed by three separate, two-person survey teams in less than two weeks. Each survey team coordinated with District staff to document visible and anecdotal condition information.
- Site and floor plans were verified and updated in the field.
- Documented deficiencies with photos.
- Condition data was updated on the OSPI ICOS system.
- Area analysis and drawing updates

### Deliverables Similar to RFP11930

- ☒ Update to previous assessment study
- ☒ Cost estimates to update deficiencies
- ☒ Educational adequacy assessments
- ☒ Database integration for future planning
- ☒ Drawing updates

### Initial budget and final cost/meeting deadlines

The SES contract was \$89,820 with all work and reports delivered by April 2017. All deadlines were met and all deliverables were produced within the contract amount.



### Number of Facilities

24 buildings on 16 sites

### SF Assessed

439,032 square feet

### Project 5: City of Olympia, Building Condition Assessment of City-Owned Buildings

SES performed a City-wide BCA update for 24 buildings, including City Hall, children's museum, justice center, several fire stations, regional library, performing arts center, maintenance center, and administrative offices.

- Worked with City maintenance staff to collect data regarding facility condition, recent maintenance work, and planned future maintenance and renewal projects.
- Collected data of facility systems conditions and observed deficiencies that fed into an FCA Microsoft Access Database, used for cost projecting.
- Cost projections for observed deficiencies were modeled for a 20-year timeline.
- ADA self-transition planning

### Deliverables Similar to RFP11930

- ☒ Update to previous assessment study
- ☒ Cost estimates to update deficiencies
- ☒ Database integration for future planning

### Initial budget and final cost/meeting deadlines

The SES contract was \$208,772 with all work and reports delivered in 2019. All deadlines were met and all deliverables were produced within the contract amount.

## 5. PROJECT EXPERIENCE AND PAST PERFORMANCE



**Number of Facilities**  
Varied by year

**SF Assessed**  
More than 30 million SF  
over four BCA studies

### **Project 6: Seattle Public Schools, Four Building Condition Assessments**

*(Personal projects for SES Managing Principal, Joel Davis, while employed at Meng)*

Before joining SES in 2017, Joel Davis scoped and managed four major Building Condition Assessment projects in 2002, 2004, 2009, and 2014 while employed at Meng Analysis. Joel has supported Seattle Public Schools and its Building Excellence II Capital Program since 1997. He has served as the consistent link with the many District staff transitions over the years.

- The initial 2002 BCA scope included developing a collaborative approach for working with District staff while scoping and scheduling the assessments, biweekly progress meetings and integrating with multiple stakeholder groups in the District, including Capital Projects, Building and Technology (BTA), Demographics, Maintenance, Mechanical Coordinators, Resource Conservation Managers, Property Management, and Legal.
- The first FCA in 2002 was conducted by three full multidisciplinary teams. The number of field personnel required multiple trainings and meetings to manage schedules successfully and to facilitate consistency in deficiency condition ratings and cost estimating.
- Three Educational Adequacy assessors were fielded to evaluate the District's facilities in comparison with the guide schools and three general rating categories for Capacity, Configuration, and Environment.
- Major updates to the BCA data occurred in 2006, 2009, and 2014. During these updates, the survey teams were streamlined to reflect an updated approach to reduce costs and included two assessors responsible for reviewing Civil, Structural, Architectural (CSA) and Mechanical, Electrical, Plumbing (MEP) systems with SPS staff.
- BCA data was updated and migrated by manual data entry to populate the certified Building Condition Assessments on the OSPI ICOS system. Site and floor plans were routinely verified and updated in the field. New area analyses were generated electronically and uploaded to ICOS.

#### **Deliverables Similar to RFP11930**

- ☒ Update to previous assessment study
- ☒ Cost estimates to update deficiencies
- ☒ Educational adequacy assessments
- ☒ Database integration for future planning

#### **Initial budget and final cost/meeting deadlines**

The 2002 contract was approximately \$500,000. The 2014 update contract was approximately \$350,000. BCA data is currently maintained in an older version of the facilities database. SPS was offered a more-current version that would also provide long-term, cyclical renewal costs. There was a two-month schedule delay in the report due to issues with the outdated Meng Facilities Database.



## 6. PROJECT APPROACH

### Approach to Building Condition Assessments

Our BCAs are conducted for site infrastructure systems and facility systems on a building-by-building basis, including central plants for HVAC and distribution, when appropriate. We tailor each BCA to the owner's requirement, schedule, and budget, encouraging client staff resources in the process. We utilize a three-step process to balance efficiency and effectiveness:

- Phase 1 - Background Data Collection and Preparation
- Phase 2 - Field Condition Assessment Data Collection
- Phase 3 - Data Analysis and Reporting, ICOS data entry, condition scores deficiencies, cost modeling, and analysis reporting.

#### Online Pre-Assessment Questionnaire

The screenshot shows a web form titled 'Online Pre-Assessment Questionnaire'. At the top, there is a 'Today's Date:' field with a calendar icon. Below this is 'Section 1: Basic Site Information'. The form includes several input fields: 'Name of School, Facility, Building or Site', 'Number of Buildings / Number of Portables', 'Site I.D. # / Building ID #', 'Site Size (acres):', 'Building Size (SF):', 'Additions List year(s):', and 'Major Renovations List year(s):'. Each field is represented by a text box with a light blue border.

#### Phase 1 - Background Data Collection and Preparation

Following notice-to-proceed, the following Phase I preparation tasks are anticipated:

##### 1. Data Collection:

- ICOS Condition data;
- McKinstry data;
- Facilities Database data from Access
- Major Maintenance & Repair (greater than \$5,000) from SPS work order system
- BEX IV Projects
- BTA Projects
- Current site and floorplan drawings from ICOS, SPS and/or BEX IV/BTA architects
- Earthquake/seismic data from SPS

**2. Anecdotal Information that is often missed in documentation or not updated in databases, but known to O&M staff:**

- O&M Online Questionnaire
- Optional O&M Workshop

##### 3. Update Assessment forms with new BCA SPS requirements:

- Portable buildings assessments:
  - 9 Systems
- Code: ADA accessibility
- Code: Fixture Counts
- Health & Life Safety
- Room Usage

##### 4. Assembly of Data into Field Survey Binders

##### 5. Update Draft Survey Schedule for distribution by SPS to school administrators

#### Phase 2 - Field Condition Assessment Data Collection

Consistent with the 2014 SPS BCA Update, we propose a streamlined approach using three two-person teams for conducting the field surveys for the BCA, organized by north, central, and south areas.

Each team consists of:

- **Assessor #1** – Civil, Structural, and Architectural (CSA) systems
- **Assessor #2** – Mechanical, Electrical, and Plumbing (MEP) systems

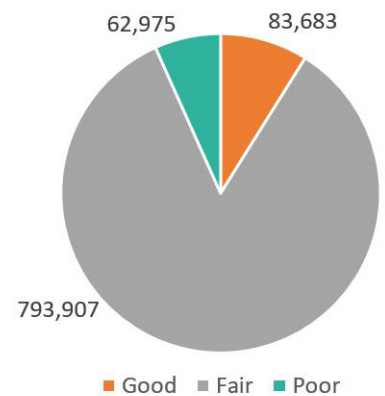
- **Assessors are BCA certified**, and our MEP team members are field-based commissioning agents with extensive retro-commissioning experience to identify MEP deficiencies related to system performance and operations.
- All site and building conditions data is collected by SES' ICOS BCA data collection forms. These forms are used to capture asset conditions, deficiencies and causes, actions needed to correct the deficiency, remaining useful life (RUL), and quantity and unit of measure of the deficiency. Data is collected in CSI Unifomat. The CSI Unifomat system includes site subsystems, such as playgrounds and other outdoor play features. Existing BCA data is migrated from ICOS to field-based forms for updating.
- Portables will be evaluated using a unique form to capture data on 9 building systems: foundation ties, roofs, exterior walls, doors, windows, stairs/ramps, restrooms, heating, and lighting. Additional systems may be included for review as desired by Seattle Public Schools.
- General accessibility of the facility will be observed throughout the BCA review and will be captured as an "ADA" deficiency.
- Detailed floor plans within the field binders are used to reference throughout the assessment for room numbers, square footage, plumbing fixture count, and arrangement for the floor plan update.

Field surveys for the BCA team entails rapid visual assessment of the facility conditions, along with a comparison to existing floor plans.

- Assessments begin with a conversation with on-site school administrative and other custodial/maintenance staff to understand any maintenance not captured in the O&M meeting and to verify room usage.
- All building subsystems will receive updated condition scores, remaining useful life (RUL) for high-valve MEP systems, and will be evaluated for deficiencies.

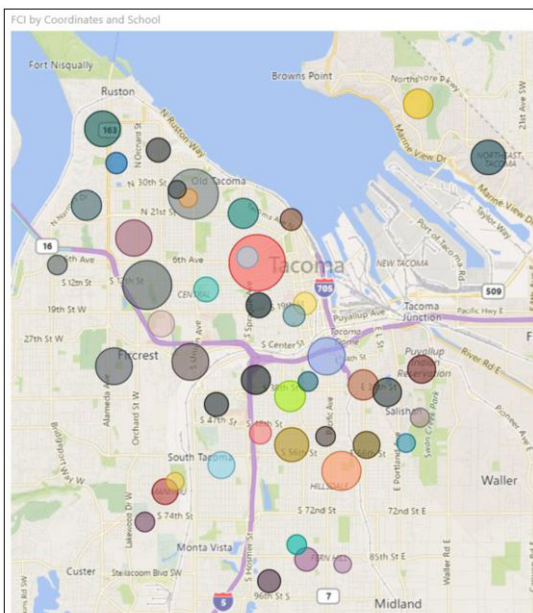
At the conclusion of each site visit prior to leaving the site, assessors will discuss general findings, cost estimates, ensure all spaces were evaluated including portables and play structures, and write executive summaries for BCA.

**North Kitsap School District  
BCA Condition Scores  
Asset Portfolio GSF**



#### Visualization of TPS FCI Scores

These visualizations provide a geographic perspective of FCI score distribution. Small circles (i.e. lower scores) indicate better FCI scores and larger circles indicate poorer FCI scores.



#### Phase 3 - Data Analysis and Reporting

ICOS data entry of BCA, space usage, floorplan, and earthquake hazard information follows the completion of fieldwork. ICOS reports are then distributed to the SES team for QC reviews.

Our professional K-12 cost consultant reviews all deficiency costs for current Puget Sound market costs in the Pacific Northwest and typical design-bid-build project delivery of major maintenance replacement or repairs. This provides owners with more credible costs than RS Means-factored costs used by all national FCA software vendors.

Standard BCA data analysis consists of applying filters by which data can be categorized, prioritized, and evaluated into various tables and graphs.

**Data visualization provides insight into the thousands of data points collected in the field.** SES uses the database to make BCA reports with our analysis, which can be produced for the overall portfolio, as well as individual buildings, sites, and systems.

A draft report will be prepared for the District's review and any necessary revision will be incorporated into the Final Report.



The database will be set up to support specific scenario planning and accompanying data visualization to understand impacts and will be made available to Seattle Public Schools at the conclusion of the project.

## Educational Adequacy (EA) Approach

In 2002, Seattle Public Schools set the standard for developing a formal approach and methodology for portfolio-wide assessments of EA. Since Joel Davis was the consultant's (i.e., Meng's) project manager for this initial development, and subsequently the PIC for implementing the four EA updates for SPS, we are the most experienced with past data collection and reporting practices. Since joining Sazan Environmental Services in 2017, Joel and the SES team has updated the EA process with other K-12 clients. Therefore, while SES is the most qualified to replicate the 2002 methodology, we are also most qualified to support SPS if you are interested in updating the original EA methodology now in 2020.

**For SPS' 2020 EA Update**, we propose an approach that will provide an opportunity to update the methodology as follows:

### 1. Review and Incorporate current EA/LEA Evaluation Criteria

Joel Davis will lead the proposed EA/LEA process and leverage a proven facilitated workshop approach with the SPS/SES team to identify and prioritize update options. The LEA field team will also be responsible for the additional data collection relative to SPS expectations for code related issues such as ADA and fixtures.

- New/Current Education Specifications for Guide Schools
- OSPI Program Guidelines (e.g., Prototypical Model)
- BEX V Planning Criteria
  - Facility Master Plan (FMP) 2018 Update
  - 2017-18 Right-sized Capacities (for long-range planning)
  - FMP Task Force Recommendations
- SPS Owner Project Requirements (OPR)
- K-12 facility planning and design trends
- Revise EA/LEA evaluation forms

### 2. Complete Qualitative and Quantitative Field Assessments

WASHINGTON STATE OFFICE OF THE SUPERINTENDENT OF PUBLIC INSTRUCTION  
K-12 CAPITAL FACILITIES COST STUDY

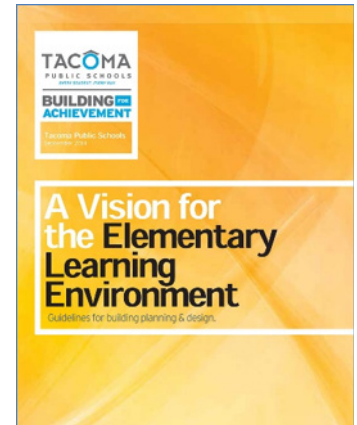
Space Type	Elementary School Area Distribution	Middle School Area Distribution	High School Area Distribution
STEM / Laboratory	2.8%	7.2%	19.9%
Cafeteria	6.1%	14.1%	8.1%
Classroom	55.7%	35.0%	28.1%
Library	4.2%	5.0%	2.2%
Learning Resource Center	0.1%	0.0%	0.3%
Assembly / Multi-purpose	1.7%	0.9%	3.9%
Service / Support	2.0%	4.1%	4.8%
Student Services	2.1%	2.1%	3.3%
Physical Education / Gym	8.2%	23.1%	21.7%
Office	5.1%	5.5%	6.0%
General Support	10.8%	1.9%	1.6%
Covered Play Area	1.1%	1.0%	0.0%

Table 12: Program area distribution by school type and space type

### 3. Analysis & Reporting of EA Findings

Modernizing the EA methodology should support new District policies, demographic change within the District, student growth, in addition to incorporating the following dynamics in K-12 facility planning and design:

- Student-centered learning
- Distance learning
- Small-group pullout areas
- SPS health clinics
- Supervision and interior transparencies
- STEM/STEAM programs
- Classroom size reduction/ McCleary Decision
- Site and building safety and security




**Time for an update?**

In recognition of such changes, there is strong merit in an approach that would update EA evaluation criteria with current K-12 facility planning and design practices.

Sazan's EA consulting for Tacoma Public Schools, North Kitsap School District and North Thurston Public schools incorporated additional program updates such as:

- "Learning Environment Assessment" has superseded "Education Adequacy" to elevate facility planning standards above merely "adequate" and better align with the K-12 planning and design industry's nomenclature and the Association for Learning Environments (A4LE).

- Consideration of special district visioning documents to incorporate new program requirements of a) an aligned, linear geometry of music rooms-stage-commons-multi-purpose areas, and b) new furniture guidelines to accommodate all shapes, sizes, and learning styles of students within grade levels.
- Using State and other School District Education Specification for benchmarking comparisons.
- Updated LEA Assessment forms



### Learning Environment Assessment (LEA)

prepared by Sazan Environmental Services

<b>Facility Name</b> Kingston High School	<b>Facility ID #</b> 12518	<b>Level</b> 9-12
<b>Original Construction</b> 2007	<b>Year Mod/Add</b> N/A	
<b>Enrollment</b> 682	<b>GSF Area</b> 112,211	
<b>Capacity:</b> 800		
		<b>SF/Student</b>
<b>KHS</b>		165
<b>CKSD</b>		227
<b>LWSD</b>		151

**Scoring**

- 1 **Excellent** (Meets All NKSD Standards)
- 2 **Good** (Meets Most NKSD Standards)
- 3 **Fair** (Below Current NKSD Standards w/Some Criteria Lacking)
- 4 **Poor** (Far Below NKSD Standards w/Many Criteria Lacking)
- 5 **Unsuitable** (Severely Lacking Support for NKSD Standards)


#### Learning Environment Assessment Criteria

	SPACE	CONFIGURATION	ENVIRONMENT	COMMENTS
	Size Quantity	Location/Adjacencies Student Centered Flexible / Adaptable Community Partnerships	Aesthetics Safety Responsive to Human Needs	
Administration, Teacher Flex/Group, Conf. Community, Counseling	1	1	2	1
Core Learning (900 SF General Classrooms)	1	1	1	2
Small Group Learning Areas	1	1	1	3
Kindergarten				4
Preschool, Child Care, Head Start				5
Resource, Special Education (OPTP, ESL, etc.), Family, Life Skills	2	3	2	6
Library, Information Resources (1,800 SF)	2	2	2	7
Science, Art Graphics	3	3	2	8
Multi-Purpose, Cafeteria, Commons, Kitchen	2	1	1	9
Performing Arts (Band, Choir, Drama)	3	3	2	10
Gym, Fitness, Athletics, Covered Play	3	3	2	11
Technology, Shops, Computer Labs, Testing	2	2	2	12
Storage, Restrooms, Custodial	2	2	2	13
General Circulation, Corridors, Lobby, Public Areas	1	3	1	14
Playfields	1	3	1	15
Site: Parking, Bus, Parent Drop-off	3	2	3	16
<b>Subtotal Scores</b>	1.9	2.1	1.7	

Surveyed By: JCD

Date Surveyed: 8/15/18

**Learning Environment Assessment Score**    **1.93**



Our selection criteria for Educational Adequacy assessors includes: extensive K-12 planning and design experience; prior EA/LEA assessment experience; prior facility and capital planning experience working for K-12/schools. Our EA/LEA assessment team is organized by specific school level categories (i.e., ES/MS/HS), rather than the geographic organization of our FCA/BCA field teams.

Integrus Architecture brings the firm's excellence in high school planning and design to focus on the assessments of High Schools and Service Schools. Building upon our working relationship with Johnny Hong, we will leverage his recent assessment work for Bremerton School District and his planning and design of the new Central Kitsap High School project.

Middle School assessments will be conducted by Ty Heim and leverage his prior EA experience of the EA assessments of SPS Middle Schools for the initial 2002 assessment and 2005 Update.

Bob Wolpert, David Huffman, and Joel Davis will leverage extensive BCA and LEA experience and will be responsible for the EA/FCA of the Elementary Schools.

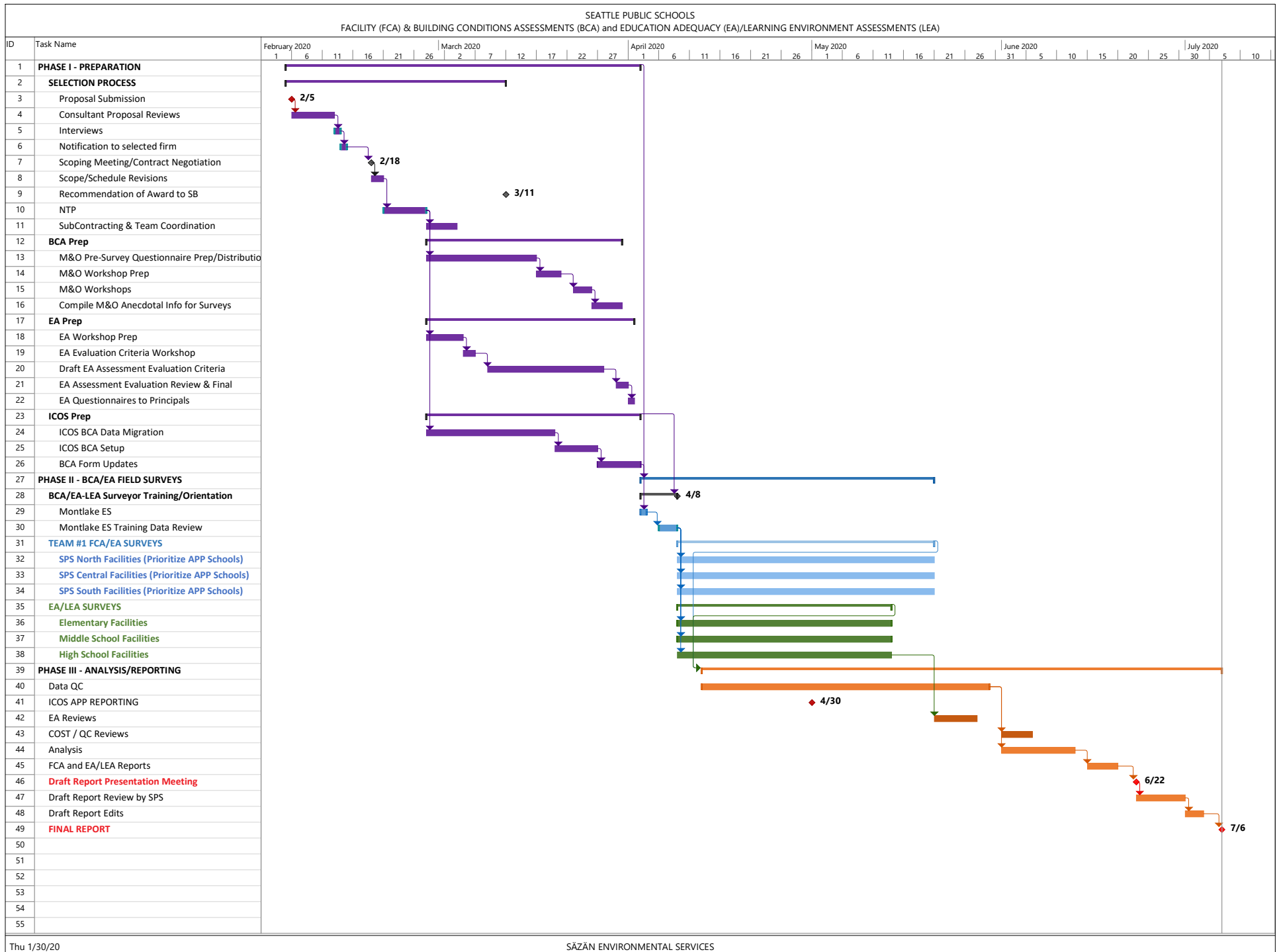
### EA/LEA Deliverables

Similar to our FCA/BCA, our EA/LEA deliverables we include hard-copy volumes and source data in Excel, with both a) pre-defined pivot tables for reporting; and b) linked analytical dashboards for graphic visualizations, powered by Microsoft's free version of PowerBI. Should SPS desire to update data in the Facilities Database currently used by the District, we are able to support this deliverable too.



## 7. PROJECT SCHEDULE

The project schedule is designed for all work to flow with little to no lag time and provides some recovery time by performing surveys concurrently.



## 8. TEAM AND TEAM ORGANIZATION



### Personnel Qualifications and Experience

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We have assembled a team of BCA professionals with the experience, dedication, and desire to deliver successful assessments of all your facilities. Our team includes Certified BCA Consultants, licensed professionals, and the option to have PCS Structural Solutions update its seismic cost updates from 2012. Our key team members are Joel Davis and Astrid Santiago, who are leaders in our firm's assessment services. Our team is supplemented with field assessment professionals who specialize in evaluating building systems.



#### **Joel Davis, MA, MBA**

**Firm:** Săzän Environmental Services **Role:** BCA Principal-in-Charge, EA Assessments

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**Education:** MBA in International Business, Ohio University; MA in International Affairs, Ohio University; BS in Languages and Linguistics, Georgetown University

Joel is a certified BCA Consultant with more than 20 years of experience in building optimization services, including building condition assessments and conducting EAs. He has served as Project Principal on four previous BCA reports for Seattle Public Schools, while employed at Meng Analysis. Joel has been a source of ongoing system assessments for educational institutions and government agencies, many of which work with him every 4-5 years for updated BCAs. His K-12 and BCA experience includes more than 300 projects.

#### **Condition Assessment Projects at SES (2017 - present)**

- North Thurston Public Schools, 2019 Building Condition Assessments
- North Kitsap School District, 2018 BCA and Learning Environment Assessments
- Tacoma Public Schools, 2017 BCA and Learning Environment Assessments
- Bellevue School District, 2017 BCA and Educational Adequacy Study and Survey
- City of Olympia, 2019 Building Condition Assessment of City-Owned Buildings

#### **Condition Assessment Projects at MENG Analysis (1997 - 2017)**

- **Seattle Public Schools, 2002, 2006, 2009, 2014 Building Condition Assessments**
- Carbonado School District, Pre-Disaster Mitigation Plan BCAs
- Clover Park School District, FCA, EA Assessments, and Security Measure Assessments
- Concrete School District, Pre-Disaster Mitigation Plan BCA
- Lake Washington School District, Building Condition Evaluation Survey
- Nespelem School District, Building Condition Assessments
- Northshore School District, District-Wide C21 Comparative Facility Analysis
- Pasco School District, Livingston, McGee, and Stevens Schools FCA and EA
- Port Angeles School District, Pre-Disaster Mitigation Plan BCA
- Shoreline School District, Pre-Disaster Mitigation Plan BCA
- Tacoma Public Schools, Asset Preservation Program BCA
- Tukwila School District, District-Wide FCA
- University Place School District, District-Wide FCA



## Astrid Santiago, VMA, LEED Green Associate

**Firm:** Săzän Environmental Services **Role:** BCA Project Manager

**Education:** MS in Natural Resources, University of Michigan; MS in Mechanical Engineering, University of Michigan; BS in Civil Engineering, University of Michigan

**Licenses and Registrations:** Value Methodology Associate (VMA), SAVE International; LEED Green Associate

Astrid is a project manager and data analyst for SES facility, building, and property condition assessments. With a background in sustainable systems and engineering, Astrid brings a strong understanding of the sustainable built environment. She provides project management, team member support, data analysis, report preparation, and quality assurance to our condition assessments. Astrid will help coordinate field survey activities, ICOS database migration, and provide technical data analyses and editing for all report deliverables. She is also preparing to become a BCA-certified individual by the OSPI by late February 2020.

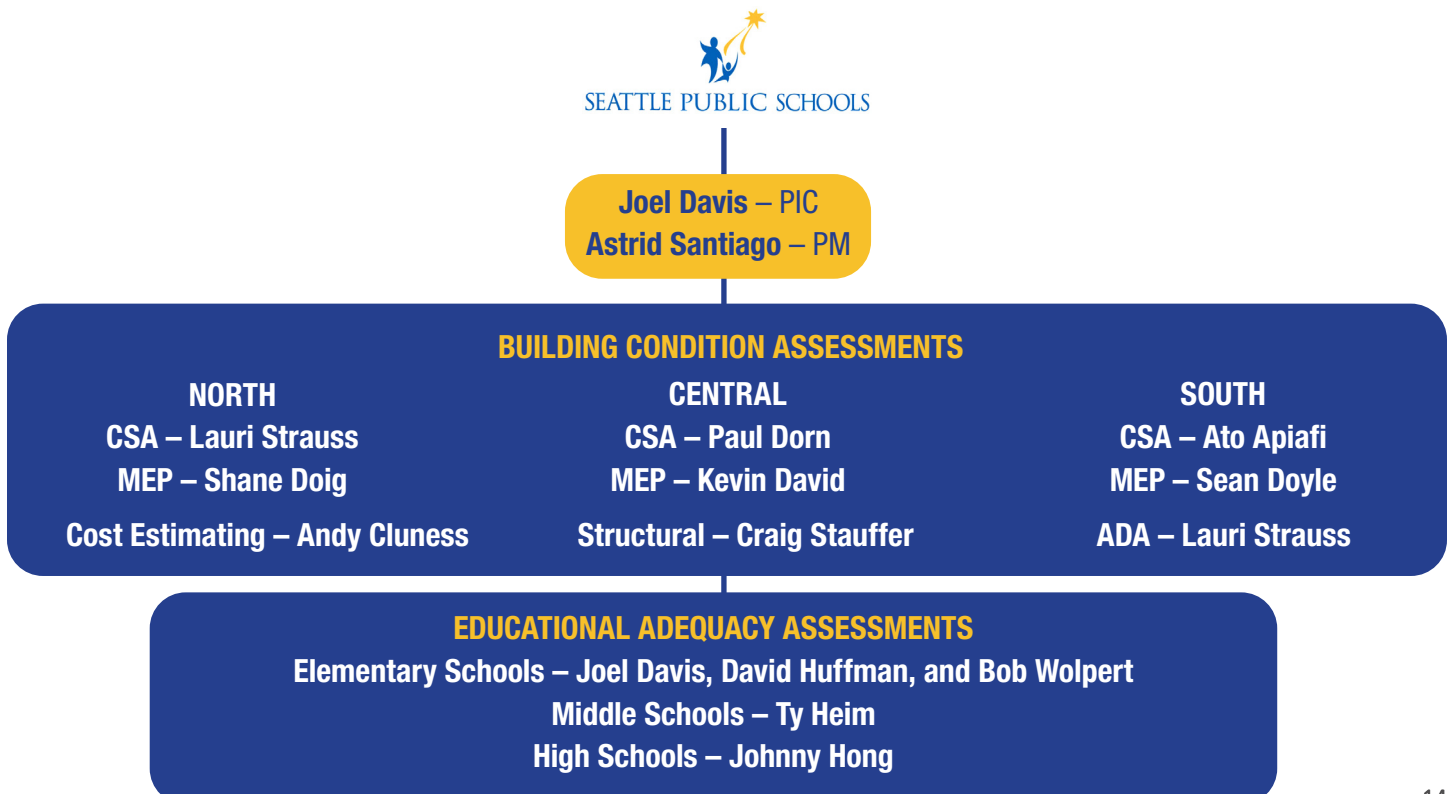
### Condition Assessment Projects at SES (2017 - present)

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- Tacoma Public Schools, 2017 BCA and Learning Environment Assessments
- Bellevue School District, 2017 BCA and Educational Adequacy Study and Survey
- City of Olympia, 2019 Building Condition Assessment of City-Owned Buildings

## ADDITIONAL TEAM SUPPORT AND RESOURCES (WITH SUBCONSULTANTS)

### Field Teams for Condition Assessments

Joel and Astrid will manage the field teams that will collect the building and system assessments and floor plan information. Our field teams include multiple architects, engineers, and mechanical engineering and seismic experts to gather the requested data for this contract. Their qualifications are summarized in pages 15-16.





### **Lauri Strauss, AIA, LEED AP BD+C**

**Firm: design2 LAST Role: Civil, Structural, Architectural Assessments — North and ADA**

Lauri has more than 30 years of experience managing architectural studies and design projects for school districts and municipal clients, including BCA projects for the Tacoma Public Schools and the City of Olympia with SES. She specializes in architectural and ADA assessments and provides solutions for low-maintenance, durable, energy-efficient, and healthy indoor environments.

### **Paul Dorn, AIA, LEED AP**

**Firm: Rolluda Architects Role: Civil, Structural, Architectural Assessments — Central**

Paul has more than 30 years of architectural experience, specializing in K-12. He has worked with Seattle Public Schools on more than 40 K-12 assessment and design projects. In 2019, he was on a team to assess Kendall Elementary School for the Mount Baker School District, reviewing the structure's exterior enclosure, interior construction, finishes, equipment, and furnishings for an OSPI BCA.

### **Ato Apiafi, AIA, LEED AP BD+C**

**Firm: Ato Apiafi Architects Role: Civil, Structural, Architectural Assessments — South**

Ato has more than 20 years of diverse architecture experience and demonstrated leadership ability of his small architecture firm. He has worked with SES in the same capacity on BCA projects for Tacoma Public Schools and the Bellevue School District. He has additional condition assessment experience with King County, the City of Seattle, and the City of Tacoma.

### **David Huffman, AIA, CSI**

**Firm: Self-Employed Role: Education Adequacy Assessments — Elementary**

David brings 40 years of architectural assessment and review services to the team. He specializes in facility studies, code analysis, and ADA compliance reviews for K-12 projects. Additional experience includes life cycle cost analysis and value engineering peer review. He has previously worked on BCA projects for the Bellevue, Northshore, Snoqualmie, Tahoma, and Tumwater School Districts.

### **Shane Doig**

**Firm: SES Role: Mechanical, Electrical, Plumbing Assessments – North**

Shane has more than 20 years' experience in the HVAC industry, including over 16 years in K-12 new and existing building commissioning. Shane's background in maintenance and operations gives him the ability to assess a wide variety of systems.

### **Kevin David, EIT, CCP**

**Firm: SES Role: Mechanical, Electrical, Plumbing Assessments — Central**

Kevin specializes in assessments, commissioning, and balancing for building systems. His experience includes assessing existing buildings and new facilities for educational, healthcare, government, and private sector projects. He was previously employed by MENG Analysis, where he worked with Joel on assessments for more than 30 schools across Washington.

### **Sean Doyle, CxA, LEED AP**

**Firm: SES Role: Mechanical, Electrical, Plumbing Assessments — South**

Sean is a certified Building Commissioning Association Assessment Consultant with more than 30 years in the building industry, including MEP assessments, commissioning, Test-Adjust-Balance, maintenance, and HVAC service contracts. He recently provided MEP assessments for similar BCA projects at SES for North Kitsap School District, Tacoma Public Schools, and Bellevue School District.

**Bob Wolpert, Architect, MBA, LEED AP****Firm: Self-Employed Role: Educational Adequacy Assessments — Elementary**

Bob has 37 years in the building industry and is the former Director of Facilities and Operations for the Olympia School District, giving him unique insight to long-term educational planning. He has collaborated with SES for the past five years on building optimization projects, including the Tacoma Public Schools BCA. His additional K-12 BCA clients include the Elma, Grapeview, Hoquiam, Ocosta, Port Townsend, Shelton, Toledo, Tukwila, University Place, and Winlock School Districts.

**Ty M. Heim****Firm: Integrus Architecture Role: Educational Adequacy Assessments — Middle Schools**

Ty brings a background in education and healthcare facility assessment, capital planning, design and construction program leadership. Formerly the Assistant Direct of Capital Projects for the Northshore School District and a past Board Member of the Capital Projects Advisory Review Board of the Washington State Legislature he has strong organization leadership skills working with internal and external stakeholders.

**Johnny Hong, AIA, LEED AP****Firm: Integrus Architecture Role: Educational Adequacy Assessments — High Schools**

Johnny has over 14 years of school design experience at Integrus including large, complex education projects. He worked on the Study & Survey and Master Plan for Bremerton School District. His K-12 experiences include new construction and renovation on elementary, middle, and high school and support facilities across Washington.

**Andy Cluness, AIA, LEED AP BD+C****Firm: ARC Cost Group Role: Cost Estimating — BCA and ADA Costs**

Andy brings more than 20 years of construction management industry experience, including the past 19 years in the Pacific Northwest. He has worked on projects in this sector and projects of a similar size and scope, including the recent City of Olympia BCA/ADA project with SES. Andy is an industry expert in budget preparation, cost estimating, bid evaluation, project controls, and GC/CM Estimate Analysis and Reconciliation. He has provided cost estimating services to previous Seattle Public Schools projects, including Northgate Elementary School, Rainier Beach High School, and West Woodland Elementary School.

**Craig Stauffer, PE, SE****Firm: PCS Structural Solutions Role: Seismic Assessments — As Needed Support**

Craig manages structural assessments and upgrades to existing buildings and brings an extensive resume in performing multi-campus BCAs and seismic surveys. He worked with Joel Davis on the 2014 BCA for Seattle Public Schools and the 2019 City of Olympia BCA. Other K-12 BCA experience includes assessments for the Bainbridge Island, La Conner, and Northshore School Districts. He also performed seismic studies in 2017 for the University of Washington campus.

**Brian Rezentes, AIA, NCARB****Firm: Integrus Architecture Role: CSA Support**

Brian has over 13 years of experience designing and managing projects from programming to construction administration. He has participated in BCAs for Highline and Shoreline Public Schools and the Renton School District and an Addition for Ingraham High School for Seattle Public Schools.

**Charles Calvano, AIA, CSI****Firm: Integrus Architecture Role: CSA Support**

Charles has 17 years of experience in all aspects of the project architect role from programming to construction administration. He is well-versed in K-12 design, space planning, phasing and site master planning in new and remodeled schools. Charles has BCA experience on Shorecrest and Shorewood High Schools for Shoreline Public Schools and additions for Ingraham High and McGilvra Elementary Schools for Seattle Public Schools.



## 9. AVAILABILITY AND CAPACITY



### Availability of Key Personnel

We have prepared our submittal anticipating a March 2020 start date. We have assembled a full team of subconsultants to perform the field assessments in several teams to meet the anticipated deliverable date of July 6, 2020.

- The SES FCA team has completed two BCA projects for North Thurston Public Schools and the City of Olympia. As SES Managing Principal, Joel Davis provides quality review for our other third-party review services, and takes the lead on BCA projects, making them his priority.
- We have no other BCA projects lined up at this time, so the Seattle Public Schools project will be our team's top priority.
- We have also received full commitments from all subconsultants to be available to meet the anticipated schedules for all deliverables.



### Capacity to Accomplish the Work

- We understand Seattle Public Schools is planning on using this report for BTA V planning in three years. Our proposed schedule outlines our capacity and deliverables to meet the District's goal of a 2023 bond vote.
- We work in the latest BCA software platforms and can easily share our BCA data as a comma separate values (CSV) file or formatted in Excel for each migration to the District's future system.
- Our team can provide the data, systems integration, and future maintenance road maps to help you keep your buildings optimum.

## 10. REFERENCES



### K-12 BCA References

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#### **North Thurston Public Schools**

Dean Martinolich  
Director of Construction and Design  
(360) 412-4500  
dmartinolich@nthurston.k12.wa.us

#### **Pasco School District**

Stephen Story  
Executive Director of Operations  
(Formerly of Tacoma Public Schools)  
(253) 405-0943 cell  
(509) 543-6713  
sstory@psd1.org

#### **Bellevue School District**

Kyle McLeod  
former Owner's Rep and PM (now with Hainline)  
(206) 382-9263  
kmcleod@hainline.net

## 11. PRICING

### Project Understanding for Pricing

We understand the final contract will be on a time-and-material, not-to-exceed basis, plus reimbursable expenses.

Per the RFP, we are including hourly rate pricing structures for our key personnel and subconsultants.


We propose to perform all scope of work in this RFP for the not-to-exceed amount of \$437,201.

Säzän Environmental Services - Hourly Rates and Reimbursables Costs	
<b>SES Consulting Services</b>	<b>Reimbursables</b>
Principal ..... \$200 - \$235	Reprographics..... \$0.10/page
Director ..... \$185 - \$200	Mileage..... Current IRS rate
Associate ..... \$160 - \$185	Other Direct Costs and Expenses ..... Cost + 12%
Consultant ..... \$135 - \$160	
Project Manager ..... \$115 - \$135	
Engineering Technician ..... \$95 - \$115	
Operations/Administrative ..... \$85 - \$130	
<b>Subconsultants</b>	
CSA Assessors..... \$145 - \$175	
MEP Assessors..... \$160 - \$185	
EA Assessor ..... \$145 - \$175	
Cost Estimator ..... \$160	

Säzän Environmental Services - BCA/EA Services Fee		
<b>BASIC BCA/EA FEE SUMMARY</b>		
<b>PHASE I - Preparation</b>	<b>\$</b>	<b>12,436</b>
<b>PHASE II - Field Assessments</b>	<b>\$</b>	<b>323,496</b>
<b>PHASE III - Data Analysis &amp; Reporting</b>	<b>\$</b>	<b>50,181</b>
<b>BASIC FEE SUBTOTAL</b>	<b>\$</b>	<b>386,112</b>
<b>Expenses &amp; Reports</b>	<b>\$</b>	<b>8,201</b>
<b>Basic BCA/EA Services Fee Total</b>	<b>.....</b>	<b>\$ 394,314</b>
<b>OPTIONAL SERVICES</b>		
<b>Condition Assessments of 285 Portables</b>	<b>\$</b>	<b>33,520</b>
<b>Classroom Photographs</b>	<b>\$</b>	<b>9,368</b>
<b>Optional Services Fee Total</b>	<b>.....</b>	<b>\$ 42,888</b>
<b>LUMP-SUM PROPOSED TOTAL</b>	<b>.....</b>	<b>\$ 437,201</b>

## 12. TERMS AND CONDITIONS

We have reviewed and accept the terms and conditions provided in RFP11930, including the District's Contract for Consulting Services.



Joel Davis, MA, MBA  
Managing Principal



SÄZÄN

Environmental Services

CONTACT INFORMATION

600 Stewart Street, Suite 1400  
Seattle, Washington 98101  
(206) 267-1700 / (206) 267-1701 fax

sazan.com/ses 

fb.com/SazanSES 

@SazanSES 