School Improvement Bond Committee
Meeting Virtual
Thursday, December 10, 2020 4:30 PM

Agenda

I. 4:30 pm - Introductions, Public Comment, Acknowledge Meeting Minutes - 10 min.
II. 4:40 pm - Bond Accountability Quarterly Report (BAC) - 15 min
III. 4:55 pm - Office of School Modernization (OSM) Quarterly Report - 15 min.
IV. 5:10 pm - Bond Execution Plan - 20 min.
V. 5:30 pm - Bond Accountability Committee (BAC) New Membership Discussion - 30 min.
VI. 6:00 pm - Adjourn

SCHOOL DISTRICT NO. 1J, MULTNOMAH COUNTY, OREGON
Meeting of the Board of Education's School Improvement Bond Committee
October 29, 2020

MEETING NOTES

The purpose of this document is to provide an overview of the actions taken by the School Board and of discussions and reports given. Anyone interested in viewing the full meeting, please visit the School Board website at https://www.pps.net/domain/219.

A meeting of the Board of Education's School Improvement Bond Committee came to order at 4:31 pm at the call of Committee Chair Michelle DePass. This meeting was held virtually due to Covid-19 and streamed live at: https://www.youtube.com/user/ppscomms/videos

Attendance

Committee Members
Directors DePass (Committee Chair) Kohnstamm, and Scott; Student Representative Shue

Absent: None

Staff and Other Attendees
Kara Bradshaw – Executive Assistant, Board of Education
Canaan Chatman – Business Development, Anderson Construction
Emily Courtnage – Director, Purchasing and Contracting
Marina Creswell – Senior Director, School Modernization
Stephanie Coyle – Hoffman Pacific Mark, Lincoln project manager
Brian Glover – Fortis Construction, Madison High School Modernization
Claire Hertz – Deputy Superintendent of Business and Operations Dan Jung
Marcus Klein – Fortis Construction, Madison High School Modernization
Mark Matthews – Pacific Mark Construction, Advisory Committee Member
Brad Nile – Anderson Construction
Rosanne Powell – Senior Manager, Board of Education
Terry Proctor – Manager, Multimedia Services
David Roy – Senior Director, Communications
Elisha Schorr – Area Senior Director, High School Programs
Stephanie Soden-Back – Executive Chief of Staff
Erin Storlie – Anderson Construction, Preconstruction Manager, Benson
Jackson Weinberg – District Student Council Representative
Mary Wiener – Student Success Program Manager, STEAM

Pre-meeting

The virtual meeting opened for attendees to arrive at 4:15 pm. No deliberation or decisions were made prior to the start of the meeting.

Introductions, Acknowledgement of Previous Meeting Minutes, and Public Comment

Time Started: 4:31

All attendees introduced themselves. The previous Meeting Minutes were acknowledged with no discussion.

Business Equity Overview

Time Started: 4:37

Emily Courtnage introduced the Equity in Public Purchasing and Contracting Policy, noting the three focuses in the policy are Business Equity, Workforce Equity, and Career Learning Equity. She provided an overview of the Business Equity component of the policy, explaining that business equity looks at the funds spent on contractors and engineers. She stated that the policy requires a minimum of 18% of the funds spent on contracting and engineering go to businesses that are certified as being minority or woman owned, which includes prime contractors, subcontractors and other tiered contractors.

Dan Jung shared that the district has always met the minimum percentage required and that it increased during the years 2016-2019, but that there has been a decrease in 2019/20. He noted that staff have the most ability to influence which contractor is awarded a contract through the direct appointment process. He stated that direct appointment contracts have been awarded to minority businesses 37% of the time, cumulatively, since 2016. He shared that hard bid contract awards require contracts to be awarded to the lowest cost responsible contractor, which often decreases the overall percentage of contracts awarded to certified minority and women owned businesses. There was discussion regarding the equity component of the Request for Proposal (RFP) language and how direct appointment contracts are awarded. Ms. Cresswell provided an overview of the current efforts to increase business equity, including working with the Equity in Contracting Advisory Committee, attending outreach events, and requesting that the external Performance Auditors focus on business equity for the bond audit. She shared that equity proposals from the district's Construction Manager General Contractor (CMGC) partners were to be presented at the Bond Accountability Meeting (BAC), but that it will need to be rescheduled. There was discussion regarding the types of outreach that the CMGC partners participate in, including participating in direct outreach, providing smaller bid packages to provide opportunity for smaller companies, and providing mentorship and education. Canaan Chatman, Anderson Construction, provided an overview of the equity work they are doing, as well as the lessons that he's learned from previous projects. Erin Storlie noted that the larger the project is, the harder it is to increase the percentage of OAME businesses, adding that they are focusing on creating opportunities for contractors that don't have the buying power.

2020 Bond Execution Plan Overview

Time Started: 5:26 pm

Dan Jung provided an overview of next steps to be taken if the capital bond passes, noting that the 2020 Bond execution plan is currently being worked on in preparation. The execution plan will outline the scopes of work, schedule, and financial conditions for each project. He shared that each scope of work will have its own sequence of events, but will include assessment, engagement, prioritization, planning and design, and implementation. He noted that for some of the scopes there would be a lot of behind the scenes work happening from the beginning before any direct implementation begins. Director Scott asked if the Capital Improvement Plan would be amended if the bond passes, and Marina replied that it would. There was discussion regarding the community engagement process. Dan Jung shared that engagement will look different by project, aligned with each scope of work. Ms. Cresswell added that some of the community engagement and engagement planning has already begun.

Appointment of Bond Accountability Committee Member and Chair

Time Started: 5:40 pm

Dan Jung shared that they are actively recruiting participants for the Bond Accountability Committee (BAC), and that they hope to have a list of applicants to present to the committee in December, including a potential chair, so that recommendations for appointments can be made to the full board at that time. There was a question regarding whether there was enough time to make a decision about the board chair and make a recommendation to the board before the current board chair leaves the committee. It was noted that the timeline is tight, but that there is enough time. There was a request for a conversation regarding member term limits at a future meeting.

Process to Restructure Bond Accountability Committee (BAC) reporting

Time Started: 5:50 pm

Dan Jung shared that they are in the process of updating the Bond Accountability Committee's quarterly reporting documents, noting that they hope to have the documents drafted by the end of the year. There was no committee discussion on the topic.

Adjourn

Committee Chair DePass adjourned the meeting at 5:51 pm.

The next School Improvement Bond Committee meeting is scheduled for December 10, 2020.

Submitted by:

Kara Bradshaw

Kara Bradshaw, Executive Assistant
PPS Board of Education

MEMORANDUM

Date: November 20, 2020

To: The Board of Education's School Improvement Bond Committee

From: Bond Accountability Committee (BAC)

Subject: 31st BAC Report

Background

In November 2012, voters approved a $482M capital improvement bond for Portland Public Schools. The PPS Board appointed a Citizen Bond Accountability Committee to monitor the planning and progress of the bond program relative to voter-approved work scope, schedule and budget objectives.

In May 2017, voters approved a $790M capital improvement bond measure that included a requirement for citizen accountability and oversight. Following passage of the measure, the Board expanded the BAC's Charter to include the 2017 program.

In October 2019, the Board expanded the BAC's monitoring responsibilities to include the District's future bond planning efforts.

In November 2020, voters approved a $1.208 billion capital improvement bond measure that included a requirement for citizen accountability and oversight. The BAC's Charter requires amendment to include the 2020 program.

Beginning in November 2019, the BAC's reports are delivered to the Board's School Improvement Bond Committee.

The members of the BAC are:

Greg DiLoreto
Norm Dowty
Tenzin Kalsang Gonta
Tom Peterson
Kevin Spellman, Chair
Dick Steinbrugge
Cheryl Twete
Karen Weylandt
Beth Woodward

Recent Activities

The BAC's quarterly meeting was held in a virtual session on November 4 due to the need to postpone after the original October 28 date was not publicly noticed. Since it was a virtual meeting, the public was invited to submit written comment and view a live stream. Staff presentation materials and meeting minutes, along with BAC reports, are regularly posted on the District website.

No public comment was received.

As this report is written, PPS staff is managing the following work:

- Construction work at Kellogg Middle School.
- Construction work at Madison High School.
- Construction work at Lincoln High School.
- Closeout at Grant High School and design for the Upper Field Improvement.
- Contracting for Roosevelt High School Phase IV.
- Closeout at Franklin High School.
- Multiple Health and Safety projects.
- Design work for Benson High School plus TI work and preconstruction for the CTE building at Marshall, and design work for Kenton.
- Design work for Multiple Pathways to Graduation ("MPG").
- Development of an Execution Plan for the 2020 bond program.

The Office of School Modernization ("OSM") has had several staff vacancies including the Director of Construction and Senior Manager of Business Operations positions open for some time. We understand that well-qualified applicants are now available, and the hiring process is underway.

With regard to the expiration of overall program management and construction management services (CBRE/Heery), OSM has revised its strategy. It intends to directly contract for existing CBRE/Heery CMs currently working on 2017 Modernization projects for continuity purposes but use on-call contracts on Health and Safety work. A separate RFP will be issued for program management consulting services.

2012 Bond Program

Closeout and final accounting are in various stages at Franklin, Roosevelt, and Grant High Schools. Final accounting at Franklin is complete and only the required contract evaluation remains outstanding. Our audit subcommittee has received a copy of the closeout cost audit for Roosevelt (through Phase III) but has not seen final documentation. At Grant, late cost issues have been settled

with the contractor. Our audit subcommittee has yet to receive copies of mid-point or closeout audits for Grant.

Current cost projections for the program include some additional funding for Roosevelt Phase IV and for a few improvement projects at Grant.

Work on the window rehabilitation at Roosevelt is complete, well ahead of the original schedule and work on Phase IV new construction is starting.

Oregon law provides that evaluations of projects exempted from competitive bidding are issued shortly after completion. Evaluations on Franklin, Grant, and Roosevelt are expected soon.

The 2012 program now shows projected final savings of $1,015,000.

2017 Bond Program

The budget situation for the 2017 Bond program remains in the red. As reported previously, a bond premium amounting to $68 million was secured from the last bond sale; it is currently being carried in the program budget, but we believe that it should be applied directly to the shortfall at Benson.

Projected interest earnings for the program have been reduced from $21.5 million to $12 million. The entire program now reports unfunded costs of $207 million. (Funds for a projected shortfall of $214 million are included in the 2020 bond package.)

Challenges arising out of the coronavirus pandemic continue to impact the program. Operational safety plans have been established for each of the construction sites incorporating best practices based on recommendations by the CDC, local health officials and the District. Each of the contractors has provided their own COVID-19 safety plans. There have been a few confirmed individual cases on District projects but no clusters.

The pandemic has resulted in some labor challenges, slowdowns from social distancing requirements, and supply chain disruptions, with cost and schedule ramifications. We applaud the approach taken by OSM staff in working proactively with contractors to identify and mitigate problems. At the time of our meeting, COVID-related costs had amounted to $2.6 million, with projections for an additional $1.2 million in 2020 and $4 million in 2021.

Staff reported that these costs are being reflected in both project contingencies and the program contingency. This can cause some confusion. For instance, Kellogg's contingency is expected to be sufficient to handle its COVID costs whereas Madison's is not; yet both projects report that they are still on budget.

It seems that a better approach (and one consistent with prior practice) would be to show project-related COVID costs at the project level and transfer budget increases from the program contingency as appropriate. It would also be helpful to regularly report on the status of both project and program contingencies for full transparency.

Construction continues at Kellogg Middle School and is scheduled to complete in early 2021 allowing significant time for FF&E installation before school opening in the fall. Change orders on the project have reached only 4% and the project contingency remains healthy enough at this time to absorb all expected COVID expenses. Cost projections show completion within the current budget.

Schedule and budget remain the key issues at Madison High School. All remaining weather days were utilized to mitigate smoke/fire impacts in September, and selective overtime is being worked to recover as well as from COVID effects. The project was one day ahead of schedule and the team was working on increasing float.

There was discussion about the status of Madison's project contingency and staff presented a summary of its current status. There are differing interpretations of the definition of remaining contingency – does it include funds assigned to identified risks, or is it only funds that remain for unidentified risks?

Either way, staff advised that the project cannot absorb COVID costs so there will need to be a transfer of some magnitude from the program contingency.

Staff continues to do a good job in managing the budget and schedule, but both are now very tight. We recommend that no discretionary changes should be approved at this time, and that staff now update the Board Bond Committee on status of both schedule and budget at each meeting until construction concludes.

As we advised in our previous report, renaming of Madison could also have a significant effect on schedule and budget. Staff told the BAC that the project could accommodate a change if the decision is made by January but any decision after that date would have negative impacts. OSM should directly advise the Board Committee of the timeline under which a change can be accommodated prior to reopening.

Considerable work has occurred at Lincoln High School despite the fact that the building permit is running months late. It was currently in its 5th round of comments. COVID issues have caused disruptions but the project remains on schedule at this time.

The Lincoln schedule still predicts completion of Phase I by 2022/23 school opening, with Phase 2 work to follow.

Benson High School has reached the 100% design development milestone; the initial cost estimate exceeds budget so the team will work to bring it within budget while retaining an acceptable project contingency. Significant site investigation took place in the building during the summer which provided valuable information to the design team and the CMGC. In addition, the removal of paint from the historic main building east elevation wall went better than expected.

TI work at Marshall that started in the summer has continued during distance learning conditions. The auxiliary CTE building has been reduced in size and significant value engineering options adopted for budget purposes. The current permitting timeline threatens to delay construction work and subsequent move in. The scope of work at Kenton has been reduced and staff continues its coordination with De La Salle High School on the building transition.

The Masterplan for the Multiple Pathways building is changing due to input from Portland Bureau of Transportation. Initial contractor estimates for the project were well outside the budget, so work is being done to reconcile the two. The design team is actively engaging students starting with the schematic design phase.

Health and Safety staff and contractors were extraordinarily busy this summer with work at multiple school sites and, in many cases, have been able to take advantage of the extended period of remote learning. Over $16 million was spent during the quarter. Of the $158 million dedicated to Health and Safety work, over $74 million has been spent as follows:

Accessibility	$8,815,000
Asbestos Remediation	$4,610,000
Fire Sprinkler/Alarms	$14,801,000
Lead Paint Stabilization	$1,569,000
Radon Mitigation	$ 159,000
Roof Improvements	$40,489,000
Security Improvements	$6,649,000
Water	$2,728,000
Management Costs	$7,623,000
OSCIM Grant	$3,278,000

Design is starting for re-roofing in 2021 at Duniway, MLC, and Rieke, as well as for the Seismic Rehabilitation Grant Program work at Lent.

2020 Bond Program

Staff advised that work is being finalized on an Execution Plan for the work covered by the successful 2020 bond. There was discussion about whether or

not the BAC would be briefed and/or consulted as the Plan is developed but staff made no commitment.

Other Issues

Equity. Certified business participation program-wide has fallen again slightly to a cumulative 15.69%, short of the District's aspirational goal of 18%.

The Benson contractor gave a presentation of the plans for achieving or exceeding the goal, utilizing some new strategies. In short, they expect the traditional outreach efforts for low price/best value selection will result in 14% participation. They plan to add on to this through set-aside work packages bid only by certified firms (5%) and direct contracting with certified firms (2%). The total internal goal of 22% is aggressive considering recent experience but we applaud the creative alternatives being proposed.

There was also better news from the Lincoln team which reported that they have now reported 17% contractor participation and predict that, after Phase 2 work is let, the project will achieve 17.8%.

The equity focus rightly falls on the contractors' performance, but we should not forget the consultants who, on both Lincoln and Benson, are also falling short of the goal.

Apprentice trade hours are at 24% program-wide, still well ahead of the 20% goal. The larger projects continue to see industry-wide challenges with laborer apprentices, but Lincoln has improved to 19% and Madison to 18%.

Safety. Kellogg has a stellar record with no recordable accidents during 115,000 hours worked. 413,000 hours have been worked to date at Madison, with one new minor recordable accident (one week on light duty). Lincoln experienced its first recordable accident which was minor (also one week on light duty) with 51,000 hours worked.

Audits. The mid-contract cost audit at Madison has been provided and we were hoping to hold an audit subcommittee meeting with staff and the cost auditor. The 2020/21 performance audit is underway although we have not yet held a subcommittee meeting on the workplan. The practicality and effectiveness of a BAC audit subcommittee is under review given the District's determination of how public meeting rules apply to such meetings.

Other

As reported last quarter, it has become increasingly apparent that the reporting framework for our regular meetings is no longer effective. It was created in 2013 when there were just a handful of projects in progress at any one time. Now, as an example, the Project Cost Report has over 100 line items.

Two representatives of the BAC have now met with Chair DePass, C.O.O. Jung, and OSM Senior Director Cresswell to exchange ideas and agree on principles to guide the rework process.

Tenzin Kalsang Gonta (4 years) and Tom Peterson and Kevin Spellman (both 8 years) are leaving the BAC.

Summary

Current projects are reported on schedule and on budget. However, there remain significant uncertainties arising from the unprecedented pandemic. There is also a significant management challenge ahead, given the addition of work scope from the 2020 bond program. These are extraordinary times; we hope that OSM will reach out to the BAC for creative advice and counsel as appropriate.

We remain impressed by the quality and professionalism of OSM staff, design teams and contractors as they take on multiple issues and are pleased to see continued willingness to explore new approaches. We thank the Board for this opportunity to serve and play a small part in your bond programs.

2012 Program Costs Summary

October 2020

	Original Budget	Approved Budget Changes		Current Budget	Estimate At Completion	Forecasted Over/(Under)	Actuals Approved
Bond Management	15,117,563	9,126,560	1	24,244,123	22,314,541	(1,929,582)	21,789,336
Bond Issuance Costs	3,000,000	(921,346)	2	2,078,654	2,056,501	(22,153)	2,056,501
PBOT IGA	5,000,000	-		5,000,000	4,000,000	(1,000,000)	4,000,000
OCIP	-	2,857,473	3	2,857,473	2,993,882	136,409	2,993,882
Escalation	45,000,000	(45,000,000)	4	-	-	-	-
Fund 424	-	-	5	-	-	-	-
Bond Premium	-	-	6	-	-	-	-
Contingency - OSM	5,063,798	(4,353,331)	7	710,467	2,908,891	2,198,424	-
Contingency - BOE Reserves	20,000,000	(20,000,000)	8	-	-	-	-
Additional Criteria Financing (FHS/RHS)	-	-	9	-	-	-	-
Future Interest Earnings	-	-		-	-	-	-
Grand Totals	**93,181,361**	**(58,290,644)**		**34,890,717**	**34,273,816**	**(616,901)**	**30,839,719**
Grand Totals	**93,181,361**	**(58,290,645)**		**34,890,716**	**33,814,092**	**(1,076,624)**	**26,839,719**

changes from last meeting noted in green

	Budget Change Footnotes	To / From	Amt	
1	Transfer Admin budget from Projects to Program	(10 projects)	12,333,182	
	Traffic Engineering Services	(10 projects)	300,000	
	FAM contribution to e-Builder licenses	new resource	15,000	
	Reallocated Program Management Budget	PBOT budget line	800,000	
	Additional CMs for IP2014	CM budget line	398,500	
	Div 01 Document Development	FHS	(3,375)	
	FAM contribution to e-Builder licenses - 2015	new resource	21,760	
	FAM contribution to e-Builder licenses - 2016	new resource	21,760	
	Transfer $10k from COO/CSM to payroll	Cont COO/CSM	10,000	
	FAM contribution to e-Builder licenses - 2017	new resource	21,760	
	Move funds for Bond Management	Bond MGMT	329,391	
	Add GF funds for contracts audit	new source	87,225	
	FAM contribution to e-Builder licenses - 2018	new resource	21,760	
	Reallocated Program Management Budget	varies	(420,280)	
	Reallocated Program Management Budget	varies	200,000	
	Transfer funds to payroll account	Bond MGMT	200,000	
	Move Project Management Budget	Cont COO/CSM	(2,358,277)	
	Move funding from payroll and issuance to COO Contingency	Cont COO/CSM	(114,500)	
	FAM contribution to e-Builder licenses - 2015	new source	21,760	
	Move Swing Space funding to COO Contingency	Cont COO/CSM	(259,106)	
	Move District Admin funding to COO Contingency	Cont COO/CSM	(2,500,000)	
			9,126,560	Bond Management

2	Transfer funds for Schematic Design (FHS/GHS/RHS)	Cont COO/CSM	(621,820)	
	Reallocated Program Management Budget	Bond Oversight	(800,000)	
	Bond Issuance Funds	Bond Premium	1,015,474	
	Add funds to cover costs of final issuance	Cont COO	(115,000)	
	Move funding from payroll and issuance to COO Contingency	Cont COO	(400,000)	
			(921,346)	Bond Issuance Costs
3	Move funds from COO Cont to cover OCIP	Cont Coo/CSM	2,435,000	
	FAM contribution to OCIP	new resource	21,998	
	FAM contribution to OCIP (correction)	new resource	475	
	Move funds to cover estimated cost to cover remainder of GHS		400,000	
			2,857,473	OCIP
4	Escalation (applied to current budget)	Franklin	(5,858,911)	
	Escalation (applied to current budget)	IP2014	(493,462)	
	Escalation (applied to BOE transfer)	RHS	(740,882)	
	Escalation (applied to BOE transfer)	FHS	(362,367)	
	Escalation (applied to current budget)	Roosevelt	(4,625,345)	
	Escalation (applied to current budget)	IP2014	(58,029)	
	Escalation (applied to current budget)	Faubion	(2,418,588)	
	Escalation (applied to current budget)	IP2015	(733,908)	
	Escalation (applied to current budget)	IP2015-SCI	(151,129)	
	Escalation (applied to current budget)	Grant	(10,143,276)	
	Schematic Design Budget	FHS/GHS/RHS	(19,414,103)	
			(45,000,000)	Escalation
5	Add Taxable Funds to Program	General Fund (424)	4,000,000	
	Allocate Budget to Faubion	Faubion	(450,000)	
	Earned interest	new source	82,554	
	Correcting earned interest allocation	Cont COO	(82,554)	
	Allocate Budget to Faubion	Faubion	(3,141,344)	
	Remove Budget from Program	out of program	(408,656)	
			-	Fund 424
6	Bond Premium	new resource	13,870,119	

	Transfer Bond Premium	Cont COO	(13,870,119)	
	Bond Premium #2 received	new resource	33,211,833	
	Transfer funds for project allocation	Cont COO	(30,000,000)	
	Transfer funds to cover issuance expenses	Bond Issuance	(1,015,474)	
	Allocate "first" portion of Maker Space Budget	RHS	(2,196,359)	
	Bond Premium	new resource	9,854,606	
	Allocate "last" portion of Maker Space Budget	RHS	(2,803,641)	
	Allocate budget to GHS for GMP	GHS	(7,050,965)	
			-	Bond Premium

7	Budget adjustment (Contingency - COO)	IP2013	(2,223,190)	
	Solar roof study	IP2013	(32,350)	
	Ockley Green SL	IP2013	(115,278)	
	Adding Fund 405 funds to COO Contingency	Fund 405	546,441	
	Move funds from Contingecy COO to IP2013	IP2013	(546,441)	
	Moving funds from IP2013 to COO Contingency	IP2013	546,441	
	Reallocation of IP scope of work	IP2014	(14,938,982)	
	Reallocation of IP scope of work	IP2014	13,558,581	
	Solar roof study	IP2014	(67,135)	
	Reallocation of IP scope of work	IP2015	(13,887,403)	
	Reallocation of IP scope of work	IP2015	13,521,066	
	Ockley Green SL	IP2016	115,278	
	Reallocation of IP scope of work	IP2016	(7,483,385)	
	Reallocation of IP scope of work	IP2016	15,159,159	
	Reallocation of IP scope of work	IP2017	(13,782,466)	
	Reallocation of IP scope of work	IP2017	6,796,708	
	Reallocation of IP scope of work	IP2018	(8,005,396)	
	Reallocation of IP scope of work	IP2018	9,062,120	
	Swing Site Funding Change.	Swing & Trans	(1,500,000)	
	Swing Site Funding Change.	Marshall	1,500,000	
	FHS Turf/Track Enhancements	Marshall	(1,300,000)	
	Move funds for Fund 405 reconciliation	IP2013	(62,560)	
	Reallocation of IP scope of work	IP2016	7,181,967	
	Reallocation of IP scope of work	IP2017	13,227,332	
	Reallocation of IP scope of work	IP2015	12,917,006	
	Reallocation of IP scope of work	IP2018	7,682,952	
	Reallocation of IP scope of work	IP2016	(12,319,254)	
	Reallocation of IP scope of work	IP2017	(10,192,356)	
	Reallocation of IP scope of work	IP2015	(11,803,551)	
	Reallocation of IP scope of work	IP2019	(1,949,393)	
	Reallocation of IP scope of work	IP2018	(2,314,069)	

Reallocation of IP scope of work	IP2015-SCI	(2,048,500)
Reallocation of IP scope of work	IP2015-ADA	(382,134)
Consolidate IP2015-SCI and IP2015-ADA	IP2015-ADA	382,134
Consolidate IP2015-SCI and IP2015-ADA	IP2015-SCI	(382,134)
OCIP	Bond Oversight	(2,435,000)
Budget savings	IP2013	1,000,000
Adjust Scope	IP2018	1,785,187
Adjust Scope	IP2019	1,285,755
Apply budget to construction bids	IP2014	(3,000,000)
Schematic Design Budget	FHS/GHS/RHS	(490,005)
FY2013/14 Interest Earned	new source	10,772
Holladay Annex ADA	IP2015-SCI	39,610
Budget savings	IP2013	93,537
Budget savings	IP2014	1,100,000
Additional CMs for IP2014	CM budget line	(398,500)
Remove unused FAM funds and SB1149 funds	out of program	(5,552)
Transfer funds to Maplewood (equivelant of Esc)	Maplewood	(122,477)
Earned interest	new source	299,546
Transfer Bond Premium	Bond Premium	13,870,119
Schematic Design Budget	Faubion	(4,000,000)
Reallocation of IP scope of work	IP16-IP19	22,582,080
Reallocation of IP scope of work	IP16-IP19	(22,582,080)
E-Rate + Add'l swing site funds	RHS	(1,826,150)
E-Rate	FHS	(698,400)
Construction bid delta	IP2015-Maplewood	(400,000)
E-Rate	Faubion	(229,950)
Escalation	IP2016	(1,950,943)
Transfer Bond Premium	Bond Premium	30,000,000
Master Planning budget increases	BHS/LHS/MHS	(329,998)
Grout Window Restoration	IP2016	(175,000)
"remove" Additional Criteria Financing	out of program	(6,985,057)
Escalation	GHS	(12,705,525)
Additional Criteria funding	GHS	(4,984,796)
E-Rate	GHS	(676,350)
Allocate budget to cover current costs	Marshall	(350,000)
IP2015 unforseen conditions	IP2015	(175,000)
Allocate budget to cover current costs	Marshall	(250,000)
Allocate budget to cover current costs	IP2016	(175,000)
Project Close Out	IP2013	6,161
Project Close Out	IP2015-Maplewood	125,829
Project Close Out	Ed Specs	24,832
Earned interest	new source	295,056

Allocate budget to cover current costs	IP2016	(2,500,000)
Allocate budget to cover current costs: Schematic Design	IP2016	(5,000,000)
Project Close Out	IP2014	295,011
Project Close Out	IP2015-SCI	484,467
Transfer moving budget from Tubman	Tubman	371,521
Transfer moving budget to Faubion	Faubion	(371,521)
Transfer fall protection budget to IP2017	IP2017	(1,000,000)
Remove Benson IP scope of work from IP2017	IP2017	1,326,691
Remove Benson IP scope of work to IP2018	IP2018	(1,326,691)
Project Close Out	Master Plan - Benson	101,358
Project Close Out	Tubman	798,703
Earned interest	new source	1,850,384
Remove Funding	IP2018	1,969,002
Remove Funding	IP2019	273,995
Project Close Out	Master Plan - Lincoln	42,905
Transfer $10k from COO/CSM to payroll	Bond MGMT	(10,000)
Transfer moving budget to Faubion	Faubion	(28,928)
Transfer additional funds to IP2016	IP2016	(150,000)
Transfer IP2017 "postponed" scope of work	IP2017	8,243,934
Transfer RHS modular move funding	RHS Modular Sale/Rec	(162,402)
Project Close Out	Marshall	529,885
Move funds for Bond Management	Bond MGMT	(329,391)
Project Close Out	Marshall	9,092
Tranfer funds for South Grandstands	FHS	(315,315)
Add 10M of budget for GHS	TBD	10,000,000
Allocate budget to GHS	GHS	(19,839,542)
Additional funds for IP2016	IP2016	(23,347)
Budget Correction	Remove from Program	(1,000)
Additional funds for IP2016	IP2016	(270,000)
Earned interest	new source	1,631,931
Correcting earned interest allocation	Fund 424	82,554
Move earned taxable interest to Faubion	Faubion	(82,554)
RHS mobile clinic sale proceeds	new source	43,450
Add funds to cover costs of final issuance	bond issuance costs	(265,000)
Reallocated Program Management Budget	varies	(399,720)
Reallocated Program Management Budget	varies	600,000
TEMPORARY BUDGET CHANGE	FHS	(100,000)
Transfer Savings	Faubion	3,141,344
Transfer Additional funds to Faubion	Faubion	(100,000)
Transfer unspect Maker Space budget	RHS	4,824,656
Transfer funds to payroll account	Bond MGMT	(200,000)
Transfer budget to Lewis SRGP	Lewis	(100,000)

	Transfer budget for GHS ROW work	GHS	(900,705)	
	Transfer budget for GHS "bowl" planning	GHS Bowl	(250,000)	
	JE to reduce budget for #10M for Grant HS funding	TBD	(10,000,000)	
	Transfer project management funding to contingency	Proj Mgt	2,358,277	
	Transfer budget to Grant for IT puchases	Grant IT	(1,300,000)	
	Transfer budget for Grant GMP	Grant	(2,000,000)	
	Align budget with RHS modulars	RHS	(163,402)	
	Align budget with RHS modulars	RHS	163,402	
	Correct 2015 Interest revenues	new source	24,825	
	Add FY2018 Bond interest and revenue	new source	2,020,174	
	Move funding from payroll and issuance to COO Contingency	Bond MGMT	514,500	
	Move funding from COO Contingency to Grant	Grant	(3,806,750)	
	Move funding to Franklin for baseball netting	Franklin	(5,000)	
	Move Madison MP funding to COO Contingency	Master Plan - Madison	75,920	
	Move Swing Space funding to COO Contingency	Bond MGMT	259,106	
	Temporary budget transfer to Teen Parent Playground (FHS)	Multi- Teen Parent Play	(170,000)	
	Temporary budget transfer to Franklin Repairs	Franklin Repairs	(253,600)	
	Temporary budget transfer to Franklin Repairs	Franklin Repairs	(4,645)	
	Earned interest	new source	2,181,101	
	Re-pay of temp budget transfers to FHS Repairs and Teen Parent	Franklin	428,245	
	Temporary budget transfer to Roosevelt Window Rehab	RHS Windows	(208,000)	
	Move District Admin funding to COO Contingency	Bond MGMT	2,500,000	
	Transfer budget for RHS Ph IV per BOE decision	RHS Ph IV	(4,500,000)	
	Closing out FHS Mod, to be used for FHS spin-offs	Franklin	627,954	
	Transfer FHS budget to Franklin Repairs	Franklin	(140,000)	
	Transfer funds to Faubion for Concordia write-off	Faubion	(84,114)	
	Transfer budget to Grant Bowl for design	Grant Bowl	(200,000)	
			(4,353,331)	

8	Increase Target Capacity to 1700	FHS, RHS, GHS	(10,000,000)	
	RHS Shop Bldg set aside	RHS	(2,000,000)	
	Restore RHS Shop Bldg budget	RHS	2,000,000	
	Transfer budget to Franklin	FHS	(6,000,000)	
	Transfer budget to Grant	GHS	(4,000,000)	
			(20,000,000)	Contingency-BOE Reserves

9	Additional Criteria Financing	new source	8,000,000	
	Allocate Financing to FHS & RHS	FHS/RHS	(6,985,057)	
	"remove" Additional Criteria Financing	out of program	(1,014,943)	
			-	Additional Criteria Financing (FHS/RHS)

2017 Program Costs Summary

October 2020

	Original Budget	Approved Budget Changes		Current Budget	Estimate At Completion	Forecasted Over/(Under)	Actuals Approved
Bond Management	40,000,000	9,825,737	1	49,825,737	51,702,406	1,876,669	18,825,883
Bond Issuance Costs	-	2,159,753	2	2,159,753	4,319,505	2,159,752	2,159,753
OCIP	-	5,862,000	3	5,862,000	5,862,000	-	5,796,376
Escalation	-	-		-	-	-	-
Contingency - OSM	20,000,000	5,165,057	4	25,165,057	29,565,056	4,400,000	-
Bond Premium	-	68,202,151	5	68,202,151	-	(68,202,151)	-
Future Interest Earnings	-	-		-	(12,013,473)	(12,013,473)	-
	60,000,000	**91,214,698**		**151,214,698**	**79,435,494**	**(71,779,204)**	**26,782,011**
ACCESSIBILITY - UNALLOCATED BUDGET	10,000,000	(9,977,115)	6	22,885	22,885	-	-
ASBESTOS - UNALLOCATED BUDGET	12,000,000	(6,423,094)	7	5,576,906	5,576,906	-	-
FIRE ALARM/SPRINKLER - UNALLOCATED BUDGET	25,849,990	(24,854,554)	8	995,436	995,436	-	-
LEAD PAINT - UNALLOCATED BUDGET	16,623,936	(12,833,349)	9	3,790,587	3,790,587	-	-
RADON - UNALLOCATED BUDGET	1,126,125	(261,236)	10	864,889	864,889	-	-
ROOFS - UNALLOCATED BUDGET	50,907,949	(50,367,023)	11	540,926	540,926	-	-
SECURITY - UNALLOCATED BUDGET	5,000,000	(5,000,000)	12	-	-	-	-
WATER FIXTURES/PIPES - UNALLOCATED BUDGET	28,492,000	(12,485,338)	13	16,006,662	16,006,662	-	-
OSCIM GRANT - UNALLOCATED BUDGET	-	-	14	-	-	-	-
H&S - UNALLOCATED BUDGET	-	-	15	-	-	-	-
	150,000,000	**(122,201,709)**		**27,798,291**	**27,798,291**	**-**	**-**
	210,000,000	**(30,987,011)**		**179,012,989**	**107,233,785**	**(71,779,204)**	**26,782,011**

changes from last quarter noted in green

	Budget Change Footnotes	To / From	Amt
1	*Transfer 8% of H&S Budget for MGMT*	*H&S SCOPES*	*12,000,000*
	Blue Beam Cost Share	*General Fund*	*5,610*
	Reimburse construction management costs with Bond Mgmt	*Lead Paint*	*(99,972)*
	Reimburse construction management costs with Bond Mgmt	*Water Fixtures/Pipes*	*(1,877,302)*
	Transfer to Wilson Pre-Design for cost estimating	*Cost Estimating Cons*	*(28,500)*
	Transfer to Jefferson Pre-Design for cost estimating	*Cost Estimating Cons*	*(28,500)*
	Transfer to Cleveland Pre-Design for cost estimating	*Cost Estimating Cons*	*(28,500)*

	Transfer to Wilson Pre-Design for geotech, title, survey	*Cost Estimating Cons*	*(11,200)*	
	Transfer to Jefferson Pre-Design for geotech, title, survey	*Cost Estimating Cons*	*(11,300)*	
	Transfer to Cleveland Pre-Design for geotech, title, survey	*Cost Estimating Cons*	*(12,600)*	
	Transfer to Wilson Pre-Design for structural cost est	*Cost Estimating Cons*	*(12,000)*	
	Transfer to Jefferson Pre-Design for structural cost est	*Cost Estimating Cons*	*(12,000)*	
	Transfer to Cleveland Pre-Design for structural cost est	*Cost Estimating Cons*	*(12,000)*	
	Transfer for SRGP grant application costs	*Lent SRGP Design*	*(46,000)*	
			9,825,737	*Bond Management*
2	*Transfer Bond Premium to Cover Issuance Costs*	*Bond Premium*	*1,205,755*	
	Transfer OSM Contingency to Cover Issuance Costs	*Contingency - OSM*	*953,998*	
			2,159,753	*Bond Issuance*
3	*Transfer OSM Contingency to cover OCIP costs*	*OCIP*	*3,000,000*	
	Transfer OSM Contingency to cover OCIP costs for Benson	*OCIP*	*2,862,000*	
			5,862,000	*OCIP*
4	*Transfer to Benson Pre-Design*	*Benson Pre-Design*	*(65,398)*	
	Transfer OSM Contingency to Cover Issuance Costs	*Contingency - OSM*	*(953,998)*	
	Change to Budget - Jefferson Pre-Design	*Jefferson Pre-Design*	*(100,000)*	
	Add FY2018 Bond Interest and Revenue	*New Source*	*2,286,250*	
	Change to Budget - Cleveland Pre-Design	*Cleveland Pre-Design*	*(100,000)*	
	Transfer OSM Contingency to cover OCIP costs	*Builders Risk/OCIP*	*(3,000,000)*	
	Change to Budget - Wilson Pre-Design	*Wilson Pre-Design*	*(100,000)*	
	Request for DS100 funding	*Group 3*	*(359,334)*	
	Change to Budget Multiple Sites Security - PKG1	*Security - PKG1*	*(3,047,709)*	
	Change to Budget Multiple Sites Security - PKG2	*Security - PKG2*	*(2,962,599)*	
	Change to Budget Multiple Sites Security - PKG3	*Security - PKG3*	*(2,962,600)*	
	Transfer funds for Buses for Bid Walks	*Security*	*(2,040)*	
	Move Budget from Security PKG1 to OSM Contingency	*Contingency - OSM*	*1,574,074*	
	Move Budget from Security PKG2 to OSM Contingency	*Contingency - OSM*	*1,574,073*	
	Move Budget from Security PKG3 to OSM Contingency	*Contingency - OSM*	*1,574,074*	
	Transfer Security funding to refund Contingency -OSM	*Contingency - OSM*	*4,252,727*	
	Request for DS100 funding	*Group 3*	*(35,000)*	
	Earned interest	*New Source*	*10,427,411*	
	FAM contribution to eBuilder licensing	*New Source*	*27,125*	
	Transfer OSM contingency to cover OCIP costs for Benson	*Contingency - OSM*	*(2,862,000)*	
			5,165,057	*Contingency-OSM*

5	*Add Bond Premium*	*new resource*	*1,205,755*	
	Transfer Bond Premium to Cover Issuance Costs	*Bond Issuance Costs*	*(1,205,755)*	
	Add Bond Premium	*new resource*	*68,202,151*	
			68,202,151	*Bond Premium*
6	*Transfer 8% of H&S Budget for MGMT*	*Bond MGMT*	*(800,000)*	
	Transfer budget to Group 3	*Group 3*	*(1,000,000)*	
	Transfer budget to Middle School Conversion	*MS Conversion*	*(4,720,740)*	
	Transfer budget to Group 3	*Group 3*	*(3,299,415)*	
	Reallocation of Middle Schools Budget	*MS Conversion*	*496,712*	
	Transfer budget to Middle School Conversion	*MS Conversion*	*(187,000)*	
	Transfer Winterhaven and Contingency to 2017 Bond	*Group 3*	*702,003*	
	Rigler Consolidated Project Budget Setup	*Rigler ADA*	*(450,000)*	
	Transfer budget to Rigler	*Rigler ADA*	*(300,000)*	
	Correct funding source from ADA to roof	*Group 3*	*4,000*	
	Initial budget set up	*Ockley Green*	*(45,000)*	
	Initial budget set up	*Woodlawn*	*(45,000)*	
	Initial budget set up	*Harrison Park*	*(45,000)*	
	Transfer budget to Rigler	*Rigler ADA*	*(287,675)*	
			(9,977,115)	*Accessibility-Unallocated*
7	*Transfer 8% of H&S Budget for MGMT*	*Bond MGMT*	*(960,000)*	
	Transfer budget to GROUP 4	*Group 4*	*(1,000,000)*	
	Transfer budget to Middle School Conversion	*MS Conversion*	*(776,821)*	
	Transfer budget to GROUP 4	*Group 4*	*(2,033,661)*	
	Reallocation of Middle Schools Budget	*MS Conversion*	*118,310*	
	Transfer budget for reimburseable expenses	*Multiple Sites 4565*	*(101,044)*	
	Transfer budget for reimburseable expenses	*Harrison Park*	*(10,185)*	
	Transfer budget for reimburseable expenses	*Harrison Park*	*(24,009)*	
	Transfer budget for reimburseable expenses	*Hosford*	*(41,523)*	
	Transfer budget for reimburseable expenses	*Woodstock*	*(8,613)*	
	Transfer for Original Budget Setup	*Security*	*(500,000)*	
	Add to Multiple Sites Asbestos	*Asbestos 4923*	*(810,000)*	
	Add to Multiple Sites Asbestos	*Asbestos 4923*	*(80,000)*	
	Budget Increase for asbestos abatement	*Group 3*	*(449,194)*	
	Budget Increases for Asbestos Abatement	*Group 3*	*(10,000)*	
	Add to Multiple Sites Asbestos for next set of surveys	*Asbestos 4924*	*(100,000)*	
	Transfer for consultant services for asbestos scope at Jackson	*Group 3*	*(66,361)*	
	Reversal of incorrect fund budget transfer	*Group 3*	*449,194*	

	Initial budget set up	*Stephenson 2020*	*(65,555)*	
	Initial budget set up	*Lane 2020*	*(85,900)*	
	Initial budget set up	*Hosford 2020*	*(90,652)*	
	Initial budget set up	*Woodstock 2020*	*(94,970)*	
	Initial budget set up	*Capitol Hill 2020*	*(42,300)*	
	Initial budget set up	*Vestal 2020*	*(153,910)*	
	Initial budget set up	*Rigler 2020*	*(41,480)*	
	Close out project	*Asbestos FY18-19*	*143,931*	
	Close out project	*Group 4 Asbestos*	*1,641,258*	
	Align budget with current scope	*Stephenson 2020*	*(88,734)*	
	Align budget with current scope	*Lane 2020*	*(40,669)*	
	Align budget with current scope	*Hosford 2020*	*(137,516)*	
	Align budget with current scope	*Woodstock 2020*	*(155,694)*	
	Align budget with current scope	*Capitol Hill 2020*	*(71,622)*	
	Align budget with current scope	*Vestal 2020*	*(45,250)*	
	Align budget with current scope	*Rigler 2020*	*(131,267)*	
	Initial budget set up	*Beaumont 2020*	*(220,941)*	
	Initial budget set up	*Chapman 2020*	*(102,486)*	
	Close out project	*Asbestos FY18-19*	*2,000*	
	Add contingency	*Vestal 2020*	*(15,390)*	
	Add contingency	*Chapman 2020*	*(7,345)*	
	Add contingency	*Lane 2020*	*(7,590)*	
	Initial budget set up	*Vernon 2020*	*(90,905)*	
	Add contingency	*Vernon 2020*	*(9,100)*	
	Add contingency	*Beaumont 2020*	*(22,100)*	
	Transfer budget for added scope	*Rigler 2020*	*(60,000)*	
	Transfer budget for unforeseen conditions	*Hosford 2020*	*(25,000)*	
			(6,423,094)	*Asbestos-Unallocated*
8	*Transfer 8% of H&S Budget for MGMT*	*Bond MGMT*	*(2,067,999)*	
	Transfer budet to Group 3	*Group 3*	*(1,000,000)*	
	Transfer budget to Group 2	*Group 2*	*(2,000,000)*	
	Transfer budget to Group 3	*Group 3*	*(8,223,674)*	
	Transfer budget to Group 2	*Group 2*	*(6,533,136)*	
	Transfer budget for reimburseable expenses	*Multiple Sites*	*(46,523)*	
	Transfer budget	*Chapman*	*(959,000)*	
	Remove fire sprinkler scope of work	*Chapman*	*959,000*	
	Transfer Winterhaven and Contingency to 2017 Bond	*Group 3*	*4,960,889*	
	Transfer funds to Jefferson	*Jefferson Fire Sprinkler*	*(1,147,966)*	

	Move Funding to Group 3	*Group 3*	*(65,000)*	
	Consultant svscs for sprinkler add to Rigler per Fire Marshall (A&E)	*Group 3*	*(34,000)*	
	Transfer to Jefferson for unforeseen inspector requirements	*Jefferson Fire Sprinkler*	*(20,000)*	
	Initial budget set up	*FA North Group 1*	*(1,952,500)*	
	Initial budget set up	*FA North Group 2*	*(1,955,500)*	
	Initial budget set up	*FA South Group 3*	*(1,539,763)*	
	Initial budget set up	*FA South Group 4*	*(1,880,441)*	
	Project close out	*Group 2*	*4,390,150*	
	Reallocate unneeded funds to H&S Unallocated	*H&S Unallocated*	*(4,217,766)*	
	Add funding to Rigler for fire sprinkler requirement by AHJ	*Rigler*	*(1,659,000)*	
	Return unneeded funds from Rigler	*Rigler*	*137,675*	
			(24,854,554)	*Fire Alarm/Sprinkler-Unallocated*
9	*Transfer 8% of H&S Budget for MGMT*	*Bond MGMT*	*(1,329,915)*	
	Transfer to fund construction management service	*Multi-Site Day CPM*	*(99,972)*	
	Transfer to fund exteior lead paint scope	*Multi-Site Lead Paint*	*(438,795)*	
	Transfer budget for reimburseable expenses	*Multiple Sites*	*(669,397)*	
	Transfer budget for reimburseable expenses	*Multiple Sites*	*(377,266)*	
	Transfer budget for reimburseable expenses	*Multiple Sites*	*(10,063)*	
	Transfer budget to Lead Paint Abatement Project - Bond	*Multiple Sites*	*(10,000,000)*	
	Bond Reimbursement for Painters	*Lead Paint*	*(7,914)*	
	Reimburse construction management costs with Bond Mgmt	*Bond MGMT*	*99,972*	
			(12,833,349)	*Lead Paint-Unallocated*
10	*Transfer 8% of H&S Budget for MGMT*	*Bond MGMT*	*(90,090)*	
	Transfer budget for reimburseable expenses	*Lent*	*(38,938)*	
	Transfer budget for reimburseable expenses	*Multiple Sites*	*(110,874)*	
	Transfer budget for Marysville (initial setup)	*Marysville*	*(21,334)*	
			(261,236)	*Radon-Unallocated*
11	*Transfer 8% of H&S Budget for MGMT*	*Bond MGMT*	*(4,072,636)*	
	Transfer budget to Tubman Roof	*Tubman*	*(2,743,000)*	
	Transfer budget to Group 4	*Group 4*	*(5,000,000)*	
	Transfer budget to Middle School Conversion	*MS Conversion*	*(3,285,115)*	
	Transfer budget to Group 3	*Group 3*	*(19,689,295)*	
	Reallocation of Middle Schools Budget	*MS Conversion*	*(104,817)*	
	Return "original" Tubman Roof Allocaion	*MS Conversion*	*2,743,000*	
	Transfer to cover expense of Lee Roof	*Lee - Roof Repair*	*(96,750)*	
	Transfer budget to Middle School Conversion	*MS Conversion*	*(319,737)*	

	Transfer budget to Middle School Conversion	*Holladay Center*	*(72,099)*	
	Transfer budget	*Chapman*	*(2,842,000)*	
	Transfer budget (initial set up)	*Sitton*	*(1,000,000)*	
	Jackson Consolidated Project Budget Set up	*Jackson*	*(6,521,000)*	
	Transfer roof fund from Rigler and Jackson	*Rigler and Jackson*	*9,199,104*	
	Transfer Winterhaven and Contingency to 2017 Bond	*Group 3*	*5,405,889*	
	Sitton Consolidated Project Budget Set up	*Sitton*	*(6,433,000)*	
	Tfr Funding / Program to Group 3	*Group 3*	*(10,000)*	
	Rigler Consolidated Project Budget Setup	*Rigler*	*(7,708,000)*	
	JE to move budgets from Original to Approved Change	*Sitton*	*6,433,000*	
	JE to move budgets from Original to Approved Change	*Sitton*	*(6,433,000)*	
	Increase to budget for Overall Project	*Hayhurst*	*(1,923,500)*	
	Move 2017 Bond to Group 3	*Group 3*	*(5,000)*	
	Add budget and funding to Group 3 Roof	*Group 3*	*(30,000)*	
	Correct Transpostion	*Bond MGMT*	*9*	
	Return unneeded roof funds from Rigler	*Rigler*	*300,000*	
	H&S Group 1 Design Budget Set Up	*Roof Group 1 Design*	*(919,568)*	
	H&S Group 2 Design Budget Set Up	*Roof Group 2 Design*	*(1,137,400)*	
	Correct funding source from ADA to roof	*Group 3*	*(4,000)*	
	Transfer for consultant services for additional roof scope at Jackson	*Group 3*	*(66,360)*	
	Increase for unforeseen roof conditions	*Group 3*	*(449,194)*	
	Transfer to Chapman for construction costs per bid	*Chapman Re-Roof*	*(1,418,654)*	
	Close out project	*Sitton*	*686,338*	
	Initial budget set-up	*Mt Tabor Re-Roof*	*(3,515,778)*	
	Initial budget set-up	*Kelly Re-Roof*	*(1,904,478)*	
	Transfer back funds not needed due to grant reimbursement	*Sitton*	*3,277,779*	
	Increase Unallocated Roofs budget from Unallocated H&S	*H&S-Unallocated*	*6,151,121*	
	Initial budget set-up	*Ockley Green*	*(2,150,478)*	
	Initial budget set-up	*Woodlawn*	*(1,870,886)*	
	Initial budget set-up	*Harrison Park*	*(2,987,519)*	
	Return unneeded roof funds from Rigler	*Rigler*	*150,000*	
			(50,367,023)	*Roofs-Unallocated*
12	*Transfer 8% of H&S Budget for MGMT*	*Bond MGMT*	*(400,000)*	
	Transfer budget to Middle School Conversion	*MS Conversion*	*(218,784)*	
	Reallocation of Middle Schools Budget	*MS Conversion*	*(17,191)*	
	Transfer funds for security assessment	*Security Assessment*	*(13,000)*	
	Transfer budget for reimburseable expenses	*MS Conversion*	*(67,439)*	
	Transfer budget for reimburseable expenses	*Jefferson*	*(30,859)*	

	Transfer funding to refund OSM Contingency	*Contingency - OSM*	*(4,252,727)*	
	Return unneeded funds from Pkg 1 to Unallocated	*Security Pkg 1*	*550,208*	
	Return unneeded funds from Pkg 2 to Unallocated	*Security Pkg 2*	*529,923*	
	Add funding to Pkg 3	*Security Pkg 3*	*(1,080,131)*	
			(5,000,000)	*Security-Unallocated*
13	*Transfer 8% of H&S Budget for MGMT*	*Bond MGMT*	*(2,279,360)*	
	Transfer funds for construction MGMT	*Day CPM MGMT*	*(650,000)*	
	Transfer budget for fixture replacement	*Lead WTR Repairs*	*(204,096)*	
	Transfer budget for fixture replacement	*Lead WTR Repairs*	*(1,247,263)*	
	Transfer to fund construction management service	*Multi-Site Day CPM*	*(99,972)*	
	Move funding to H&S Water projects	*Lead WTR Repairs*	*(5,000,000)*	
	Move funding for Day CPM Services	*Lead WTR Repairs*	*(1,127,330)*	
	Move funding for CH2M Hill	*Lead WTR Repairs*	*(136,727)*	
	Reimburse construction management costs with Bond Mgmt	*Bond MGMT*	*1,877,302*	
	Reallocate unneeded funds to H&S-Unallocated	*H&S-Unallocated*	*(1,933,355)*	
	Initial budget	*Drink Fixture Pkg 31*	*(349,125)*	
	Initial budget	*Drink Fixture Pkg 32*	*(342,136)*	
	Initial budget	*Drink Fixture Pkg 33*	*(283,173)*	
	Initial budget	*Drink Fixture Pkg 34*	*(354,142)*	
	Initial budget	*Drink Fixture Pkg 35*	*(355,960)*	
			(12,485,338)	*Water Fixtures/Pipes-Unallocated*
14	*OSCIM Grant*	*new resource*	*8,000,000*	
	Move Budget from OSCIM Grant to Security PKG1	*Security Project*	*(1,574,074)*	
	Move Budget from OSCIM Grant to Security PKG2	*Security Project*	*(1,574,073)*	
	Move Budget from OSCIM Grant to Security PKG3	*Security Project*	*(1,574,074)*	
	Move Budget from OSCIM Grant to Sitton Consolidated	*Sitton Consolidated*	*(3,277,779)*	
			-	*OSCIM-Unallocated*
15	*Return unneeded funds from Water-Unallocated*	*Water-Unallocated*	*1,933,355*	
	Return unneeded funds from Fire Alarm/Sprinkler-Unallocated	*Fire Al/Sp-Unallocated*	*4,217,766*	
	Transfer funding to Roofs-Unallocated	*Roofs-Unallocated*	*(6,151,121)*	
			-	*H&S-Unallocated*

Agenda

• Welcome & Introductions	5:30 – 5:35 pm
• Program Update	5:35 – 5:50 pm
• Select Project Updates	5:50 – 6:15 pm
• Questions	6:15 – 6:40 pm
• Benson Business Equity Presentation	6:40 – 7:00 pm
• Discussion	7:00 – 7:30 pm
• Wrap-Up and Adjourn	

Program Materials

Balanced Scorecard - Overall

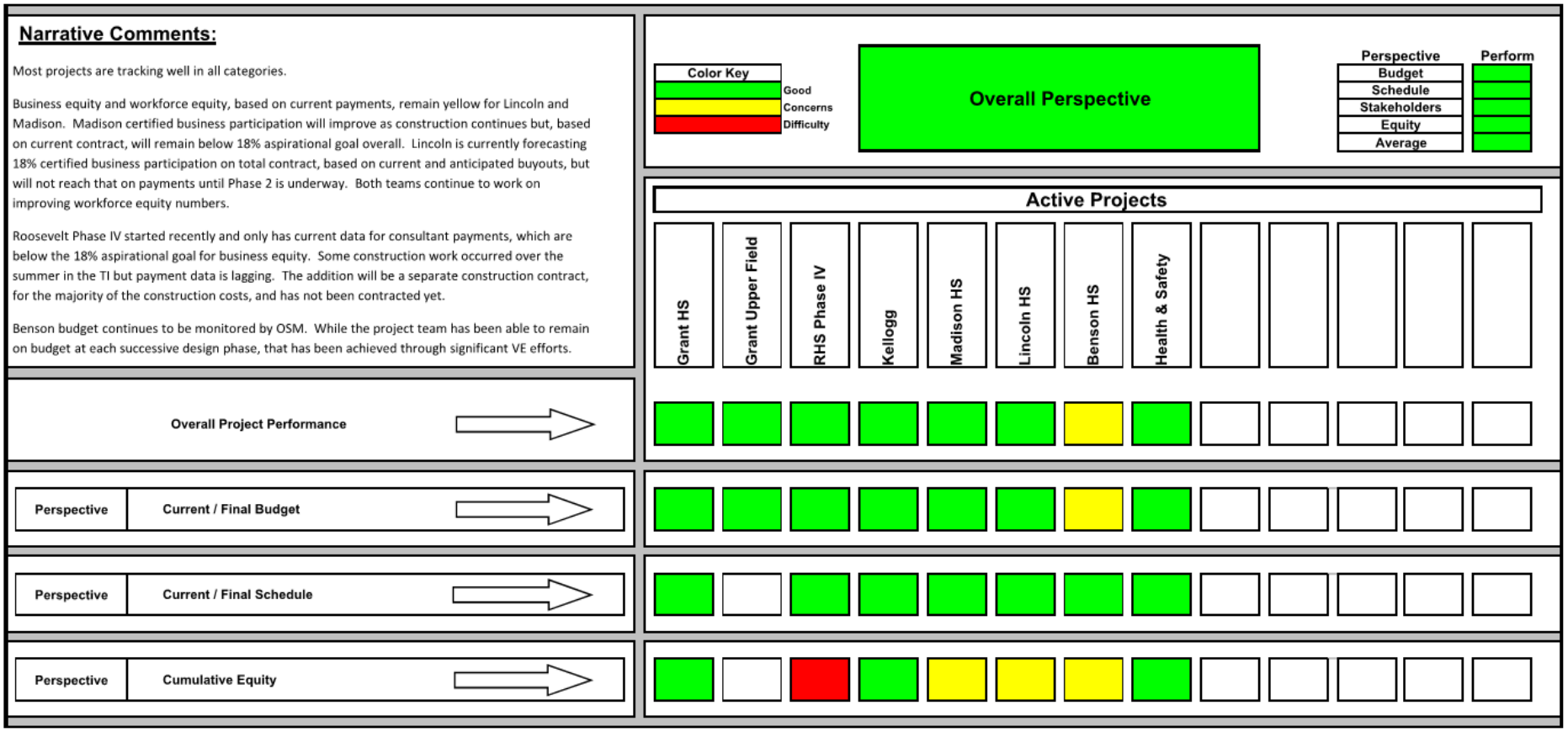
Narrative Comments:

Most projects are tracking well in all categories.

Business equity and workforce equity, based on current payments, remain yellow for Lincoln and Madison. Madison certified business participation will improve as construction continues but, based on current contract, will remain below 18% aspirational goal overall. Lincoln is currently forecasting 18% certified business participation on total contract, based on current and anticipated buyouts, but will not reach that on payments until Phase 2 is underway. Both teams continue to work on improving workforce equity numbers.

Roosevelt Phase IV started recently and only has current data for consultant payments, which are below the 18% aspirational goal for business equity. Some construction work occurred over the summer in the TI but payment data is lagging. The addition will be a separate construction contract, for the majority of the construction costs, and has not been contracted yet.

Benson budget continues to be monitored by OSM. While the project team has been able to remain on budget at each successive design phase, that has been achieved through significant VE efforts.



Balanced Scorecard - Budget

Narrative Comments:

Benson HS: VE process was successful for Marshal CTE building. Initial contractor cost estimating exercise for MPG Building master plan was concerning but design and construction teams are working to align schematic design to budget. Project team is awaiting 100% DD cost estimates for Benson HS. OSM continues to monitor the budget closely.

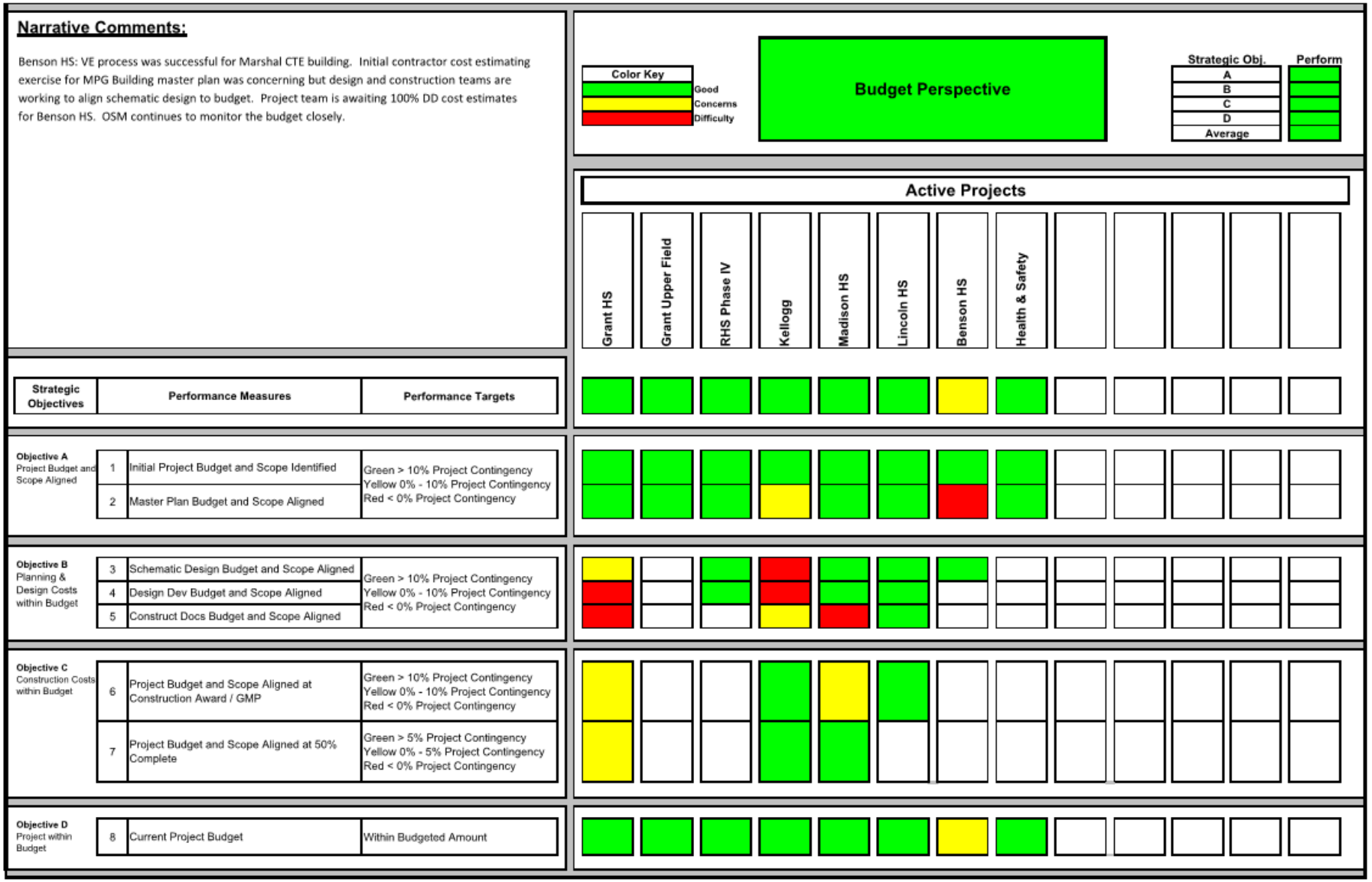
Color Key: Good / Concerns / Difficulty

Budget Perspective

Strategic Obj.	Perform
A	
B	
C	
D	
Average	

Active Projects

Strategic Objectives		Performance Measures	Performance Targets
Objective A Project Budget and Scope Aligned	1	Initial Project Budget and Scope Identified	Green > 10% Project Contingency Yellow 0% - 10% Project Contingency Red < 0% Project Contingency
	2	Master Plan Budget and Scope Aligned	
Objective B Planning & Design Costs within Budget	3	Schematic Design Budget and Scope Aligned	Green > 10% Project Contingency Yellow 0% - 10% Project Contingency Red < 0% Project Contingency
	4	Design Dev Budget and Scope Aligned	
	5	Construct Docs Budget and Scope Aligned	
Objective C Construction Costs within Budget	6	Project Budget and Scope Aligned at Construction Award / GMP	Green > 10% Project Contingency Yellow 0% - 10% Project Contingency Red < 0% Project Contingency
	7	Project Budget and Scope Aligned at 50% Complete	Green > 5% Project Contingency Yellow 0% - 5% Project Contingency Red < 0% Project Contingency
Objective D Project within Budget	8	Current Project Budget	Within Budgeted Amount



Budget Update: Project Management Cost Report

Combined Project Cost Summary Report for Capital Improvement Bond Program — **October 2020**

Project Name	Original Budget	Approved Budget Changes		Current Budget	Current Commitments	Estimate At Completion	Forecasted Over/(Under)	Actuals Approved
2012 Bond								
Franklin HS Modernization	81,585,655	30,875,627	1	112,461,282	112,332,978	112,461,282	-	112,332,978
Franklin - Teen Parent-Playground-Bond - 4833 - FY19	-	170,000	2	170,000	160,130	160,130	(9,870)	160,130
Franklin - Repairs - 5145 - FY20	-	398,245	3	398,245	464,199	398,245	-	428,371
Grant HS Modernization	88,336,829	70,533,488	4	158,870,317	158,714,287	158,870,317	-	156,024,562
Grant - Aux Gym-Batting Cages-Bond - 5311 - FY20	-	40,000	5	40,000	34,632	40,000	-	33,866
Grant - Gym-Lighting-Bond - 5337 - FY20	-	60,000	6	60,000	45,597	60,000	-	250
Grant - GHS Grant Bowl Improvements - 4919 - FY19	-	450,000	7	450,000	352,445	450,000	-	136,951
Roosevelt HS Modernization	68,418,695	32,367,036	8	100,785,731	100,785,732	100,785,731	-	100,185,876
Roosevelt - Modulars-relocated and store - 4435 - FY17	-	186,749	9	186,749	186,749	186,749	-	186,749
Roosevelt - Phase IV Modernization - 5171 - FY20	-	4,615,000	10	4,615,000	685,359	4,615,000	-	405,169
Roosevelt - Window Restoration - 5193 - FY20	-	1,193,882	11	1,193,882	1,159,621	1,193,882	-	1,043,451
Faubion Replacement	27,035,537	22,959,128	12	49,994,665	49,689,227	49,987,377	(7,288)	49,686,746
Faubion Add-Ons - 4918 - DA004 - FY19	-	125,000	13	125,000	122,276	125,000	-	120,961
Improvement Project 2013	9,467,471	2,495,669	14	11,963,140	11,963,139	11,963,140	-	11,963,139
Improvement Project 2014	13,620,121	4,191,667	15	17,811,788	17,811,788	17,811,788	-	17,811,788
Improvement Project 2015	13,521,066	102,076	16	13,623,142	13,497,438	13,497,438	(125,704)	13,497,438
Improvement Project 2015 - Maplewood	-	1,518,698	17	1,518,698	1,518,698	1,518,698	-	1,518,698
Improvement Project 2015 - SCI	-	2,057,686	18	2,057,686	2,057,686	2,057,686	-	2,057,686
Improvement Project 2016	15,274,437	1,386,346	19	16,660,783	16,405,180	16,405,275	(255,508)	16,405,180
GROUP 3 (IP 2017)	6,796,707	15,523,349	20	22,320,056	22,291,322	22,320,056	-	21,882,393
Improvement Project 2018	9,062,119	(9,062,120)	21	(1)	-	(1)	-	-
Improvement Project 2019	-	-	22	-	-	-	-	-
Master Planning - Benson HS	191,667	206,975	23	398,642	398,642	398,642	-	398,642
Master Planning - Cleveland HS	191,667	(191,667)	24	-	-	-	-	-
Master Planning - Jefferson HS	191,667	(191,667)	25	-	-	-	-	-
Master Planning - Lincoln HS	191,667	165,427	26	357,094	357,094	357,094	-	357,094
Master Planning - Madison HS	191,667	132,413	27	324,080	324,070	324,080	-	324,070
Master Planning - Wilson HS	191,667	(191,667)	28	-	-	-	-	-
Marshall Swing Site - Bond 2012	-	4,070,103	29	4,070,103	4,070,103	4,070,103	-	4,070,103
Tubman Swing Site - Bond 2012	-	1,164,776	30	1,164,776	1,164,776	1,164,776	-	1,164,776
Swing Sites & Transportation	9,550,000	(9,550,000)	31	-	-	-	-	-
Educational Specification	-	275,168	32	275,168	275,168	275,168	-	275,168
Debt Repayment	45,000,000	-		45,000,000	45,000,000	45,000,000	-	45,000,000
2012 Bond Program	93,181,361	(58,290,644)	33	34,890,717	32,079,455	34,273,816	(616,901)	26,839,719
	482,000,000	**119,786,742**		**601,786,742**	**481,614,814**	**488,310,189**	**(1,015,272)**	**471,978,976**

Budget Update: Project Management Cost Report (pg 2)

Project Name	Original Budget	Approved Budget Changes		Current Budget	Current Commitments	Estimate At Completion	Forecasted Over/(Under)	Actuals Approved
2017 Bond								
Benson HS Modernization	202,000,000	(148,347,500)	34	53,652,500	29,123,502	281,939,623	228,287,123	12,229,126
Benson HS Modernization - Kenton Swing Site-Mult Pathways - 5013	-	5,500,000	35	5,500,000	483,608	1,294,118	(4,205,882)	242,969
Benson HS Modernization - Marshall Swing Site - 5006	-	14,050,000	36	14,050,000	3,701,977	12,766,530	(1,283,470)	1,094,471
Benson HS Modernization - Mult Pathways to Graduation - 4999	-	5,500,000	37	5,500,000	4,943,320	61,727,729	56,227,729	326,618
Benson subtotal		*(123,297,500)*		*78,702,500*		*357,728,000*	*279,025,500*	
Lincoln HS Replacement	187,000,000	53,350,000	38	240,350,000	209,089,296	240,350,000	-	37,257,932
Multiple Sites - Athletic Swing Sites-Bond - 5206 - FY20	-	2,150,000	39	2,150,000	23,434	2,150,000	-	3,837
Lincoln subtotal		*55,500,000*		*242,500,000*		*242,500,000*	-	
Kellogg Replacement	45,000,000	14,811,150	40	59,811,150	53,865,736	59,811,150	-	42,833,583
Madison HS Modernization	146,000,000	56,016,189	41	202,016,189	188,963,884	202,016,190	-	103,813,892
	580,000,000	**3,029,839**		**583,029,839**	**490,194,757**	**862,055,340**	**279,025,500**	**197,802,426**
Benson HS Modernization: Pre-Design - Pre-Bond	-	561,725	42	561,725	561,725	561,725	-	561,725
Kellogg Replacement: Pre-Design - Pre-Bond	-	385,873	43	385,873	385,873	385,873	-	385,873
Lincoln HS Modernization: Pre-Design - Pre-Bond	-	378,557	44	378,557	378,557	378,557	-	378,557
Madison HS Modernization: Pre-Design - Pre-Bond	-	274,297	45	274,297	274,297	274,297	-	274,297
Cleveland HS Modernization-Pre-Design - Pre-Bond - 4964 - FY19	-	153,100	46	153,100	153,000	153,100	-	130,615
Jefferson HS Modernization-Pre-Design - Pre-Bond - 4965 - FY19	-	151,800	47	151,800	151,300	151,800	-	127,610
Wilson HS Modernization-Pre Design - Pre-Bond - 4966 - FY19	-	151,700	48	151,700	151,600	151,700	-	120,453
2017 Bond Program: Pre-Design - Pre-Bond	-	81,323	49	81,323	81,323	81,323	-	81,323
2017 Bond Program	210,000,000	(30,987,011)	50	179,012,989	37,887,710	107,233,785	(71,779,204)	26,782,011
	210,000,000	**(28,848,636)**		**181,151,364**	**40,025,385**	**109,372,160**	**(71,779,204)**	**28,842,465**
Beaumont - 2020 Asbestos Abatement-Bond - 5373 - FY20	-	243,041	51	243,041	221,862	243,041	-	168,800
Capitol Hill - 2020 Asbestos Abatement-Bond - 5275 - FY20	-	113,922	52	113,922	110,052	113,922	-	78,020
Chapman - 2020 Asbestos Abatement-Bond - 5377 - FY20	-	109,831	53	109,831	103,757	109,831	-	88,380
Chapman - Re-Roof - Bond Funded - 4671 - FY18	-	4,260,654	54	4,260,654	3,998,982	4,260,654	-	3,360,154
Creative Science - ADA Accommodation-Access Control - 5049 - FY20	-	12,855	55	12,855	33,514	12,855	-	33,514
GROUP 2 - Fire Alarm / Sprinkler	-	4,142,986	56	4,142,986	4,142,986	4,142,986	-	3,854,685
GROUP 4 - ASBESTOS	-	1,392,403	57	1,392,403	1,392,403	1,392,403	-	1,392,403
Harrison Park - Copy Room-Abate Asbestos Tile - 4664 - FY18	-	10,185	58	10,185	10,185	10,185	-	10,185
Harrison Park - K Classrooms-Abate Asbestos from floor tiles - 4441 - FY18	-	24,009	59	24,009	24,009	24,009	-	24,009
Harrison Park - Partial Re-Roof-Bond - 5321 - FY20	-	3,032,519	60	3,032,519	2,641,714	3,032,519	-	815,767
Hayhurst - SRGP-Bond - 5028 - FY19	-	4,423,500	61	4,423,500	4,206,490	4,423,500	-	4,075,437
Hosford - 2020 Asbestos Abatement-Bond - 5363 - FY20	-	253,168	62	253,168	236,477	253,168	-	73,365
Hosford - Wood Shop Floor-Asbestos - 4573 - FY18	-	41,523	63	41,523	41,523	41,523	-	41,523
Jackson - Health & Safety Improvements-Bond - 5030 - FY19	-	6,521,000	64	6,521,000	6,388,038	6,521,000	-	3,555,715
Jefferson - Camera-Pull Stations - 4528 - FY17	-	30,859	65	30,859	30,859	30,859	-	30,859
Jefferson - Fire Sprinkler Upgrades-Bond - 5053 - FY19	-	1,167,966	66	1,167,966	1,139,496	1,167,966	-	1,139,496
Kelly - Partial Re-Roof-Bond - 5319 - FY20	-	1,904,478	67	1,904,478	1,617,206	1,904,478	-	1,278,102
Lane - 2020 Asbestos Abatement-Bond - 5361 - FY20	-	134,159	68	134,159	126,819	134,159	-	86,334
Lee - Roof Repair - 4497 - FY18	-	97,000	69	97,000	97,000	97,000	-	97,000
Lent - Radon Mitigation - 4344 - FY17	-	59,512	70	59,512	59,512	59,512	-	59,512
Lent - SRGP Design - 5194 - FY20	-	46,000	71	46,000	28,040	28,040	(17,960)	27,540
Marysville - Radon Mitigation-Rms 137-138-139 - 4939 - FY20	-	21,334	72	21,334	18,284	21,334	-	8,901
Mt Tabor - Partial Re-Roof-Bond - 5320 - FY20	-	3,515,778	73	3,515,778	3,004,383	3,515,778	-	2,830,031
Multi-2018-4675-Bond-Security-PKG1 FY18-19	-	2,512,541	74	2,512,541	1,879,925	2,202,775	(309,766)	1,711,602
Multi-2018-5025-Bond-Security-PKG2-FY19	-	2,419,821	75	2,419,821	1,977,436	2,010,817	(409,004)	1,886,077
Multi-2018-5026-Bond-Security-PKG3-FY19	-	4,042,731	76	4,042,731	3,313,555	4,055,814	13,083	2,742,907
Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	-	32,540,735	77	32,540,735	32,259,551	32,540,735	-	32,091,514
Multiple Sites - Asbestos Bond Projects-2018-19 - 4923 - FY19	-	1,254,069	78	1,254,069	1,254,069	1,254,069	-	1,254,069
Multiple Sites - Asbestos Bond Projects-2019-20 - 4924 - FY20	-	100,000	79	100,000	86,069	100,000	-	45,128

Budget Update: Project Management Cost Report (pg 3)

Multiple Sites - Day CPM Management Services - 4610 - FY18	-	-	80	-	-	-	-	-
Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 31 - 5301 - FY20	-	349,125	81	349,125	269,777	349,125	-	194,257
Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 32 - 5397 - FY20	-	342,136	82	342,136	244,552	342,136	-	-
Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 33 - 5398 - FY20	-	283,173	83	283,173	257,430	283,173	-	-
Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 34 - 5390 - FY21	-	354,142	84	354,142	-	354,142	-	-
Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 35 - 5391 - FY21	-	355,960	85	355,960	-	355,960	-	-
Multiple Sites - Fire Alarm Equipment Purchase - FY15/16/17/18 - X0114	-	507,151	86	507,151	383,606	507,151	-	383,606
Multiple Sites - Fire Alarm Upgrades-North Group 1 - 5211 - FY20	-	1,952,500	87	1,952,500	1,767,528	1,952,500	-	1,177,166
Multiple Sites - Fire Alarm Upgrades-North Group 2 - 5212 - FY20	-	1,955,500	88	1,955,500	1,823,405	1,955,500	-	1,306,617
Multiple Sites - Fire Alarm Upgrades-South Group 3 - 5213 - FY20	-	1,539,763	89	1,539,763	1,383,719	1,539,763	-	734,557
Multiple Sites - Fire Alarm Upgrades-South Group 4 - 5214 - FY20	-	1,880,441	90	1,880,441	1,695,277	1,880,441	-	842,625
Multiple Sites - Floor Replacement-Bond Compensible - 4565 - FY18	-	124,841	91	124,841	124,841	124,841	-	124,841
Multiple Sites - Health & Safety Group 1 Design - 5153 - FY20	-	919,568	92	919,568	801,499	919,568	-	639,815
Multiple Sites - Health & Safety Group 2 Design - 5154 - FY20	-	1,137,400	93	1,137,400	1,021,781	1,137,400	-	820,649
Multiple Sites - Lead in Water Repairs - 4517 - FY17	-	7,129,459	94	7,129,459	2,966,093	2,966,093	(4,163,366)	2,484,138
Multiple Sites - Lead Paint Abatement - BOND	-	10,000,000	95	10,000,000	86,349	10,000,000	-	71,532
Multiple Sites - Lead Paint Abatement - Emergency Declaration - 4284 - FY17	-	1,273,501	96	1,273,501	1,273,500	1,273,501	-	1,273,500
Multiple Sites - Lead Paint Abatement - Fund 423 - 4493 -FY17	-	577,004	97	577,004	577,003	577,004	-	577,003
Multiple Sites - Radon Mitigation - 4609 - FY18	-	113,354	98	113,354	113,354	113,354	-	113,354
Ockley Green - Partial Re-Roof-Bond - 5322 - FY20	-	2,195,478	99	2,195,478	1,942,253	2,195,478	-	583,027
Rigler - 2020 Asbestos Abatement-Bond - 5369 - FY20	-	232,747	100	232,747	188,791	232,747	-	61,304
Rigler - Health & Safety Improvements-Bond - 5029 - FY19	-	9,817,000	101	9,817,000	9,716,664	9,817,000	-	8,994,066
Sitton - Health & Safety Improvements-Bond - 5027 - FY19	-	6,746,662	102	6,746,662	3,466,883	6,746,662	-	3,466,883
Stephenson - 2020 Asbestos Abatement-Bond - 5362 - FY20	-	154,289	103	154,289	134,575	154,289	-	51,538
Tubman - Roof Repairs- 4584 - OSM - FY18	-	11,740	104	11,740	9,980	11,740	-	9,980
Vernon - 2020 Asbestos Abatement-Bond - 5374 - FY20	-	100,005	105	100,005	94,084	100,005	-	73,209
Vestal - 2020 Asbestos Abatement-Bond - 5367 - FY20	-	214,550	106	214,550	211,370	214,550	-	181,485
Woodlawn - Partial Re-Roof-Bond - 5323 - FY20	-	1,915,886	107	1,915,886	1,672,252	1,915,886	-	562,553
Woodstock - 2020 Asbestos Abatement-Bond - 5368 - FY20	-	250,664	108	250,664	246,741	250,664	-	190,827
Woodstock - Hallway-Abate and replace floor tiles - 4738 - FY18	-	8,614	109	8,614	8,614	8,614	-	8,614
	-	**126,871,231**		**126,871,231**	**102,926,117**	**121,984,218**	**(4,887,013)**	**87,788,174**
	-	**101,052,434**		**891,052,434**	**633,146,259**	**1,093,411,718**	**202,359,283**	**314,433,065**
	-	**106,552,434**		**1,492,839,176**	- **1,114,761,073**	**1,581,721,906**	**201,344,011**	- **786,412,041**

Budget Update: 2012 Program Costs

2012 Program Costs Summary

October 2020

	Original Budget	Approved Budget Changes		Current Budget	Estimate At Completion	Forecasted Over/(Under)	Actuals Approved
Bond Management	15,117,563	9,126,560	1	24,244,123	22,314,541	(1,929,582)	21,789,336
Bond Issuance Costs	3,000,000	(921,346)	2	2,078,654	2,056,501	(22,153)	2,056,501
PBOT IGA	5,000,000	-		5,000,000	4,000,000	(1,000,000)	4,000,000
OCIP	-	2,857,473	3	2,857,473	2,993,882	136,409	2,993,882
Escalation	45,000,000	(45,000,000)	4	-	-	-	-
Fund 424	-	-	5	-	-	-	-
Bond Premium	-	-	6	-	-	-	-
Contingency - OSM	5,063,798	(4,353,331)	7	710,467	2,908,891	2,198,424	-
Contingency - BOE Reserves	20,000,000	(20,000,000)	8	-	-	-	-
Additional Criteria Financing (FHS/RHS)	-	-	9	-	-	-	-
Future Interest Earnings	-	-		-	-	-	-
Grand Totals	**93,181,361**	**(58,290,644)**		**34,890,717**	**34,273,816**	**(616,901)**	**30,839,719**
Grand Totals	**93,181,361**	**(58,290,645)**		**34,890,716**	**33,814,092**	**(1,076,624)**	**26,839,719**

Budget Update: 2017 Program Costs

2017 Program Costs Summary

October 2020

	Original Budget	Approved Budget Changes		Current Budget	Estimate At Completion	Forecasted Over/(Under)	Actuals Approved
Bond Management	40,000,000	9,825,737	1	49,825,737	51,702,406	1,876,669	18,825,883
Bond Issuance Costs	-	2,159,753	2	2,159,753	4,319,505	2,159,752	2,159,753
OCIP	-	5,862,000	3	5,862,000	5,862,000	-	5,796,376
Escalation	-	-		-	-	-	-
Contingency - OSM	20,000,000	5,165,057	4	25,165,057	29,565,056	4,400,000	-
Bond Premium	-	68,202,151	5	68,202,151	-	(68,202,151)	-
Future Interest Earnings	-	-		-	(12,013,473)	(12,013,473)	-
	60,000,000	**91,214,698**		**151,214,698**	**79,435,494**	**(71,779,204)**	**26,782,011**
ACCESSIBILITY - UNALLOCATED BUDGET	10,000,000	(9,977,115)	6	22,885	22,885	-	-
ASBESTOS - UNALLOCATED BUDGET	12,000,000	(6,423,094)	7	5,576,906	5,576,906	-	-
FIRE ALARM/SPRINKLER - UNALLOCATED BUDGET	25,849,990	(24,854,554)	8	995,436	995,436	-	-
LEAD PAINT - UNALLOCATED BUDGET	16,623,936	(12,833,349)	9	3,790,587	3,790,587	-	-
RADON - UNALLOCATED BUDGET	1,126,125	(261,236)	10	864,889	864,889	-	-
ROOFS - UNALLOCATED BUDGET	50,907,949	(50,367,023)	11	540,926	540,926	-	-
SECURITY - UNALLOCATED BUDGET	5,000,000	(5,000,000)	12	-	-	-	-
WATER FIXTURES/PIPES - UNALLOCATED BUDGET	28,492,000	(12,485,338)	13	16,006,662	16,006,662	-	-
OSCIM GRANT - UNALLOCATED BUDGET	-	-	14	-	-	-	-
H&S - UNALLOCATED BUDGET	-	-	15	-	-	-	-
	150,000,000	**(122,201,709)**		**27,798,291**	**27,798,291**	**-**	**-**
	210,000,000	**(30,987,011)**		**179,012,989**	**107,233,785**	**(71,779,204)**	**26,782,011**

Budget Update: Health & Safety Funding

Health & Safety Funding Allocation
October 2020

	Total Funds	Committed	Spent To Date	Balance	Unalloc Balance
Bond Fund Category: DS001 - Accessibility	**9,200,000**	**6,955,740**	**8,814,541**	**385,459**	**Accessibility**
Project Name: 2017 Bond Program	*22,885*	-	-	*22,885*	*22,885*
Project Name: GROUP 3 (IP 2017)	3,593,412	1,427,372	3,416,856	176,556	
Project Name: Harrison Park - Partial Re-Roof-Bond - 5321 - FY20	45,000	45,000	-	45,000	
Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	4,411,028	4,359,708	4,360,010	51,018	
Project Name: Ockley Green - Partial Re-Roof-Bond - 5322 - FY20	45,000	45,000	-	45,000	
Project Name: Rigler - Health & Safety Improvements-Bond - 5029 - FY19	1,037,675	1,033,659	1,037,675	-	
Project Name: Woodlawn - Partial Re-Roof-Bond - 5323 - FY20	45,000	45,000	-	45,000	
Bond Fund Category: DS002 - Asbestos Remediation	**11,040,000**	**2,610,106**	**4,609,881**	**6,430,119**	**Asbestos**
Project Name: 2017 Bond Program	*5,576,906*	-	-	*5,576,906*	*5,576,906*
Project Name: Beaumont - 2020 Asbestos Abatement-Bond - 5373 - FY20	243,041	220,560	168,800	74,241	
Project Name: Capitol Hill - 2020 Asbestos Abatement-Bond - 5275 - FY20	113,922	109,552	78,020	35,903	
Project Name: Chapman - 2020 Asbestos Abatement-Bond - 5377 - FY20	109,831	103,257	88,380	21,451	
Project Name: GROUP 3 (IP 2017)	66,361	66,361	41,144	25,217	
Project Name: GROUP 4 - ASBESTOS	1,392,403	165,618	1,392,403	-	
Project Name: Harrison Park - Copy Room-Abate Asbestos Tile - 4664 - FY18	10,185	-	10,185	-	
Project Name: Harrison Park - K Classrooms-Abate Asbestos from floor tiles - 4441 - FY18	24,009	-	24,009	-	
Project Name: Hosford - 2020 Asbestos Abatement-Bond - 5363 - FY20	253,168	235,025	73,365	179,803	
Project Name: Hosford - Wood Shop Floor-Asbestos - 4573 - FY18	41,523	-	41,523	-	
Project Name: Jackson - Health & Safety Improvements-Bond - 5030 - FY19	-	-	-	-	
Project Name: Lane - 2020 Asbestos Abatement-Bond - 5361 - FY20	134,159	126,569	86,334	47,825	
Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	658,511	638,502	638,502	20,009	
Project Name: Multiple Sites - Asbestos Bond Projects-2018-19 - 4923 - FY19	1,254,069	-	1,254,069	-	
Project Name: Multiple Sites - Asbestos Bond Projects-2019-20 - 4924 - FY20	100,000	72,411	45,128	54,872	
Project Name: Multiple Sites - Floor Replacement-Bond Compensible - 4565 - FY18	101,044	-	101,044	-	
Project Name: Rigler - 2020 Asbestos Abatement-Bond - 5369 - FY20	232,747	188,041	61,304	171,443	
Project Name: Stephenson - 2020 Asbestos Abatement-Bond - 5362 - FY20	154,289	133,825	51,538	102,751	
Project Name: Vernon - 2020 Asbestos Abatement-Bond - 5374 - FY20	100,005	93,334	73,209	26,796	
Project Name: Vestal - 2020 Asbestos Abatement-Bond - 5367 - FY20	214,550	211,120	181,485	33,065	
Project Name: Woodstock - 2020 Asbestos Abatement-Bond - 5368 - FY20	250,664	245,933	190,827	59,837	
Project Name: Woodstock - Hallway-Abate and replace floor tiles - 4738 - FY18	8,614	-	8,614	-	
Bond Fund Category: DS003 - Fire Sprinkler/Alarms	**19,564,225**	**12,226,403**	**14,801,270**	**4,762,956**	**Fire Sprink/Alarm**
Project Name: 2017 Bond Program	*995,436*	-	-	*995,436*	*995,436*
Project Name: Chapman - Re-Roof - Bond Funded - 4671 - FY18	-	-	-	-	
Project Name: GROUP 2 - Fire Alarm / Sprinkler	4,142,986	1,859,630	3,854,685	288,301	
Project Name: GROUP 3 (IP 2017)	4,361,785	1,089,684	4,342,157	19,628	
Project Name: Jefferson - Fire Sprinkler Upgrades-Bond - 5053 - FY19	1,167,966	1,134,307	1,139,496	28,470	
Project Name: Multiple Sites - Fire Alarm Equipment Purchase - FY15/16/17/18 - X0114	46,523	-	46,523	-	
Project Name: Multiple Sites - Fire Alarm Upgrades-North Group 1 - 5211 - FY20	1,952,500	1,765,412	1,177,166	775,334	
Project Name: Multiple Sites - Fire Alarm Upgrades-North Group 2 - 5212 - FY20	1,955,500	1,820,846	1,306,617	648,883	
Project Name: Multiple Sites - Fire Alarm Upgrades-South Group 3 - 5213 - FY20	1,539,763	1,381,902	734,557	805,206	
Project Name: Multiple Sites - Fire Alarm Upgrades-South Group 4 - 5214 - FY20	1,880,441	1,693,583	842,625	1,037,816	
Project Name: Rigler - Health & Safety Improvements-Bond - 5029 - FY19	1,521,325	1,481,039	1,357,443	163,883	
Bond Fund Category: DS004 - Lead Paint Stabilization	**14,624,624**	**34,155**	**1,568,683**	**13,684,942**	**Lead Paint**
Project Name: 2017 Bond Program	*3,790,587*	-	*34,113*	*3,756,474*	*3,790,587*
Project Name: Multiple Sites - Lead Paint Abatement - BOND	10,000,000	25,542	700,533	9,928,468	
Project Name: Multiple Sites - Lead Paint Abatement - Emergency Declaration - 4284 - FY17	395,243	-	395,243	-	
Project Name: Multiple Sites - Lead Paint Abatement - Fund 423 - 4493 -FY17	438,795	-	438,795	-	
Project Name: Woodstock - Hallway-Abate and replace floor tiles - 4738 - FY18	-	8,614	-	-	

Budget Update: Health & Safety Funding (pg 2)

Health & Safety Funding Allocation
October 2020

	Total Funds	Committed	Spent To Date	Balance	Unalloc Balance
Bond Fund Category: DS005 - Radon Mitigation	**1,036,035**	**18,284**	**158,713**	**877,322**	**Radon**
Project Name: 2017 Bond Program	*864,889*	-	-	*864,889*	*864,889*
Project Name: Lent - Radon Mitigation - 4344 - FY17	38,938	-	38,938	-	
Project Name: Marysville - Radon Mitigation-Rms 137-138-139 - 4939 - FY20	21,334	18,284	8,901	12,434	
Project Name: Multiple Sites - Radon Mitigation - 4609 - FY18	110,875	-	110,875	-	
Bond Fund Category: DS006 - Roof Improvements	**52,986,434**	**40,954,190**	**40,488,858**	**12,497,826**	**Roof**
Project Name: 2017 Bond Program	*540,926*	-	-	*540,926*	*540,926*
Project Name: Chapman - Re-Roof - Bond Funded - 4671 - FY18	4,260,654	3,933,164	3,360,154	900,500	
Project Name: GROUP 3 (IP 2017)	10,648,856	5,667,721	10,502,282	146,574	
Project Name: Harrison Park - Partial Re-Roof-Bond - 5321 - FY20	2,987,519	2,551,463	815,767	2,171,752	
Project Name: Hayhurst - SRGP-Bond - 5028 - FY19	1,923,500	1,682,214	1,596,173	327,327	
Project Name: Jackson - Health & Safety Improvements-Bond - 5030 - FY19	6,521,000	6,307,486	3,555,715	2,965,285	
Project Name: Kelly - Partial Re-Roof-Bond - 5319 - FY20	1,904,478	1,583,320	1,278,102	626,376	
Project Name: Lee - Roof Repair - 4497 - FY18	96,750	96,750	97,000	-	
Project Name: Mt Tabor - Partial Re-Roof-Bond - 5320 - FY20	3,515,778	2,970,645	2,830,031	685,747	
Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	3,781,759	3,781,759	3,781,759	-	
Project Name: Multiple Sites - Health & Safety Group 1 Design - 5153 - FY20	919,568	800,509	639,815	279,753	
Project Name: Multiple Sites - Health & Safety Group 2 Design - 5154 - FY20	1,137,400	1,021,781	820,649	316,751	
Project Name: Ockley Green - Partial Re-Roof-Bond - 5322 - FY20	2,150,478	1,841,390	583,027	1,567,451	
Project Name: Rigler - Health & Safety Improvements-Bond - 5029 - FY19	7,258,000	7,118,637	6,598,948	659,052	
Project Name: Sitton - Health & Safety Improvements-Bond - 5027 - FY19	3,468,883	-	3,466,883	2,000	
Project Name: Woodlawn - Partial Re-Roof-Bond - 5323 - FY20	1,870,886	1,597,352	562,553	1,308,332	
Bond Fund Category: DS007 - Security Improvements	**9,322,221**	**7,122,550**	**6,649,494**	**2,672,727**	**Security**
Project Name: 2017 Bond Program	-	-	-	-	-
Project Name: Creative Science - ADA Accommodation-Access Control - 5049 - FY20	12,855	-	12,855	-	
Project Name: Jefferson - Camera-Pull Stations - 4528 - FY17	30,859	-	30,859	-	
Project Name: Multi-2018-4675-Bond-Security-PKG1 FY18-19	2,512,541	1,697,785	1,711,602	800,939	
Project Name: Multi-2018-5025-Bond-Security-PKG2-FY19	2,419,821	1,851,374	1,886,077	533,744	
Project Name: Multi-2018-5026-Bond-Security-PKG3-FY19	4,042,731	3,308,197	2,742,907	1,299,824	
Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	303,414	265,194	265,194	38,220	
Bond Fund Category: DS008 - Water	**24,948,682**	**2,822,617**	**2,728,365**	**22,220,316**	**Water**
Project Name: 2017 Bond Program	*16,006,662*	-	-	*16,006,662*	*16,006,662*
Project Name: Multiple Sites - Drinking Fixture Replacement Program-Bid Package 31 - 5301 -	349,125	269,520	194,257	154,868	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 32 - 5397 - FY20	342,136	244,552	-	342,136	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 33 - 5398 - FY20	283,173	257,430	-	283,173	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 34 - 5390 - FY21	354,142	-	-	354,142	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 35 - 5391 - FY21	355,960	-	-	355,960	
Project Name: Multiple Sites - Lead in Water Repairs - 4517 - FY17	7,120,756	1,992,441	2,475,434	4,645,322	
Project Name: Multiple Sites - Lead in Water-Emergency Response - 4241 - FY16	136,727	58,675	58,675	78,053	
Bond Fund Category: Management Costs	**12,000,000**	**7,901,722**	**7,623,071**	**4,376,929**	
Project Name: 2017 Bond Program	*11,954,000*	*7,873,682*	*7,595,531*	*4,358,469*	
Project Name: Multiple Sites - Day CPM Management Services - 4610 - FY18	-	-	-	-	
Project Name: Lent - SRGP Design - 5194 - FY20	46,000	28,040	27,540	18,460	
Bond Fund Category: OSCIM	**3,277,779**	**-**	**3,277,779**	**-**	**OSCIM**
Project Name: 2017 Bond Program	-	-	-	-	-
Project Name: Sitton - Health & Safety Improvements-Bond - 5027 - FY19	3,277,779	-	3,277,779	-	
Bond Fund Category: H&S Unallocated	**-**	**-**	**-**	**-**	**H&S Unallocated**
Project Name: 2017 Bond Program	-	-	-	-	-
	158,000,000	**80,645,767**	**90,720,654**	**67,908,597**	**27,798,291**

Balanced Scorecard - Equity

Narrative Comments:

1. Overall OSM is tracking a cumulative 15.69%, down 0.29% since last quarter for consultants and contractors together. Current breakdown by certification type is as follows:

	Cumulative	Prior Report	Previous 12 Months	Prior Report
MBE:	5.56%	5.69%	6.64%	6.64%
WBE:	7.17%	7.28%	2.77%	2.77%
SDVBE:	<.01%	<.01%	<.01%	<.01%
ESB:	2.20%	2.22%	1.61%	1.61%
N-C:	0.77%	0.80%	0.05%	0.05%

N-C = Non-Certified (counted for credit from a Certified Business that "graduated" out or did not reapply). Business Equity data is based on invoices paid and typically is 2 months behind current jobsite conditions.

2. OSM continues to exceed the 20% apprenticeable trade hours goal (currently 24%, same as last quarter). Larger projects are seeing industry-wide challenges with laborer apprenticeship currently, but Lincoln apprenticeship has increased to 19%, and Madison apprenticeship has increased to 18%.

Color Key: Good / Concerns / Difficulty

Equity Perspective

Strategic Obj.	Perform
A	
B	
C	
Average	

Active Projects

Grant HS	Grant Upper Field	RHS Phase IV	Kellogg	Madison HS	Lincoln HS	Benson HS	Health & Safety					

Strategic Objectives		Performance Measures	Performance Targets
Objective A Meets Aspirational Certified	1	Consultants - % of payments made to Certified owned	Green: Certified >18% Yellow: Certified >10% Red: Certified <10%
	2	Contractors - % of payments made to Certified owned	
	3	Project Overall - % of payments made to Certified owned	
Objective B apprenticable trade participation	4	Contractors % of labor hours/apprenticable trade	Green: participation >20% Yellow: participation >10% Red: participation <10%
Objective C Meets student participation	5	Tier 1 - Group Activities EG: career fairs, guest speakers	Green: students > 500 Yellow: students > 100 Red: students < 100
	6	Tier 2 - 1-on-1, Short-Term Activities EG: job shadows, mock interviews	Green: students > 50 Yellow: students > 20 Red: students < 20
	7	Tier 3 - 1-on-1, Long-Term Activities EG: internships	Green: students > 10 Yellow: students > 5 Red: students < 5

2013	2014	2015	2016	2017	2018	2019	2020

Balanced Scorecard - Schedule

Narrative Comments:

1. Madison HS: Permit review delays, COVID, and air quality days have used all float. Project team is utilizing overtime to regain schedule. Official schedule as of 10/1 shows 4 days behind SC target. As of 10/8, project is 2 days behind SC target and anticipates being back on schedule by end of month. Project team is reviewing use of overtime to develop additional cushion for possible weather delays.

Color Key	
	Good
	Concerns
	Difficulty

Schedule Perspective

Strategic Obj.	Perform
A	
B	
C	
D	
E	
Average	

Active Projects

Strategic Objectives		Performance Measures	Performance Targets
Objective A Establish Schedule Target &	1	Baseline Schedule Established	Green = completed
Objective B Planning, Permitting & Design Phases on Schedule (measured from baseline schedule)	2	Design Contract Award	Green = < 0 weeks impact Yellow = 0 - 4 weeks Red > 4 weeks
	3	Schematic Design Completed	
	4	Design Development Completed	
	5	Construction Contract Documents	
	6	Land Use Permit Approved	
	7	Building Permit Approved	
Objective C Construction on Schedule (measured from baseline sched)	8	Construction Started	Green = < 0 weeks impact Yellow = 0 - 4 weeks Red > 4 weeks
	9	Substantial Completion	
	10	Final Completion	
Objective D Meet Occupancy Schedule Target	11	Occupancy On Schedule	On target for school opening
Objective E Meet Turnover Schedule Target	12	Turnover On Schedule	Green = < 10 mo after open Yellow = 10-12 mo after open Red = > 12 mo after open

Schedule Updates – Summary

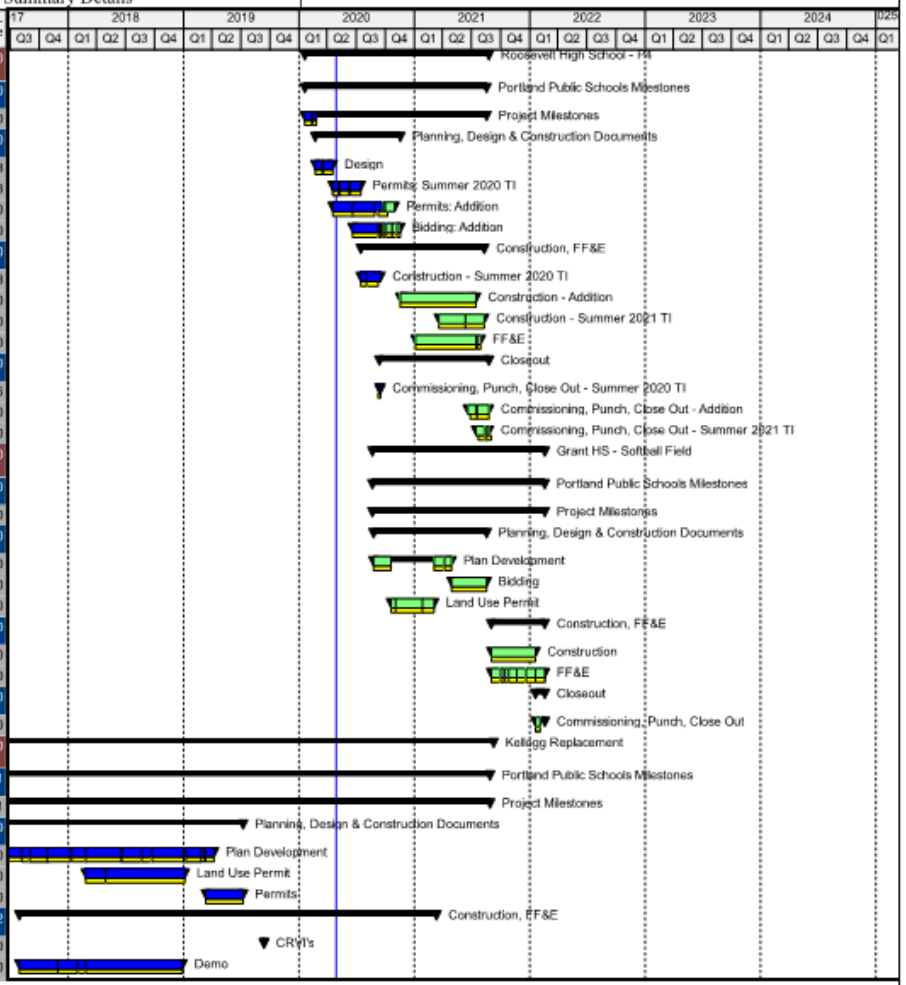
- **Roosevelt Ph IV** – No change since previous update.
- **Kellogg** – No change since previous update. Construction is in progress and continues to track towards the contract completion date.
- **Madison** – Construction is in progress and continues to track towards the contract completion date. The project continues to have labor impacts due to COVID-19. All weather days have been utilized to mitigate the Smoke/Fire impacts of September. Fortunately, the majority of exterior work is complete and remaining work is indoors and should be as affected by weather.
- **Lincoln** – Construction is in progress and continues to track toward the contract completion date. Permits for Ph2 construction are still being processed. No significant changes since last update.
- **Benson** – The Benson Modernization project is still in design and the construction schedule is being developed for all sites (Benson, MPG, Marshall, & Kenton). Design and permitting are tracking to the contract NTP date. PPS has shifted the construction schedule of BHS to start 1mo in the future, pushing all work out accordingly. The "Variance Finish Date" column is not an accurate representation of how the project is moving forward as schedules continue to be developed.
  - Benson - CD's are being developed and the schedule has some added details since last update to more accurately track the design duration. The construction portion of the schedule is being detailed out and will continue to evolve over the next 9 months.
  - MPG – SD's are being developed and the construction schedule will follow.
  - Marshall Swing Site – Ph1 Construction is substantially complete.
  - Kenton – Kenton is in the design phase and more detail will be added to the program schedule in the next update.
- **Roofing –** Sites are tracking with the exception of Ockley Green. Ockley Green has had some delays to the roofing schedule/construction that are being discussed between the District and contractor.
- **Security –** On track to be complete by the end of 2020 with the exclusion of some fencing work.

Schedule Updates – Modernization Projects

Portland Public Schools (PPS)
Master Planning Schedule
PPS - R2.1 BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL Project Finish	Variance - BL Project Finish Date
	Roosevelt High School - P4	417	23-Jan-20 A	27-Aug-21	27-Aug-21	0
	Portland Public Schools Milestones	407	23-Jan-20 A	19-Aug-21	19-Aug-21	0
	Project Milestones	407	23-Jan-20 A	19-Aug-21	19-Aug-21	0
	Planning, Design & Construction Documents	193	24-Feb-20 A	18-Nov-20	18-Nov-20	0
	Design	39	24-Feb-20 A	17-Apr-20 A	18-Aug-20	88
	Permits: Summer 2020 TI	63	17-Apr-20 A	15-Jul-20 A	09-Jul-20	-3
	Permits: Addition	140	20-Apr-20 A	30-Oct-20	30-Oct-20	0
	Bidding: Addition	108	22-Jun-20 A	18-Nov-20	18-Nov-20	0
	Construction, FF&E	277	16-Jul-20 A	12-Aug-21	12-Aug-21	0
	Construction - Summer 2020 TI	45	16-Jul-20 A	18-Sep-20 A	27-Oct-20	28
	Construction - Addition	170	19-Nov-20	16-Jul-21	16-Jul-21	0
	Construction - Summer 2021 TI	104	22-Mar-21	12-Aug-21	12-Aug-21	0
	FF&E	150	04-Jan-21	30-Jul-21	30-Jul-21	0
	Closeout	250	14-Sep-20 A	27-Aug-21	27-Aug-21	0
	Commissioning, Punch, Close Out - Summer 2020 TI	4	14-Sep-20 A	18-Sep-20 A	25-Sep-20	6
	Commissioning, Punch, Close Out - Addition	50	21-Jun-21	27-Aug-21	27-Aug-21	0
	Commissioning, Punch, Close Out - Summer 2021 TI	31	16-Jul-21	27-Aug-21	27-Aug-21	0
	Grant HS - Softball Field	386	24-Aug-20 A	18-Feb-22	18-Feb-22	0
	Portland Public Schools Milestones	385	24-Aug-20 A	17-Feb-22	17-Feb-22	0
	Project Milestones	385	24-Aug-20 A	17-Feb-22	17-Feb-22	0
	Planning, Design & Construction Documents	255	24-Aug-20	19-Aug-21	19-Aug-21	0
	Plan Development	175	24-Aug-20	29-Apr-21	29-Apr-21	0
	Bidding	80	30-Apr-21	19-Aug-21	19-Aug-21	0
	Land Use Permit	95	20-Oct-20	04-Mar-21	04-Mar-21	0
	Construction, FF&E	121	03-Sep-21	18-Feb-22	18-Feb-22	0
	Construction	100	03-Sep-21	20-Jan-22	20-Jan-22	0
	FF&E	121	03-Sep-21	18-Feb-22	18-Feb-22	0
	Closeout	20	21-Jan-22	17-Feb-22	17-Feb-22	0
	Commissioning, Punch, Close Out	20	21-Jan-22	17-Feb-22	17-Feb-22	0
	Kellogg Replacement	1121	01-May-17 A	10-Sep-21	27-Aug-21	-10
	Portland Public Schools Milestones	1112	01-May-17 A	30-Aug-21	27-Aug-21	-1
	Project Milestones	1112	01-May-17 A	30-Aug-21	27-Aug-21	-1
	Planning, Design & Construction Documents	563	01-May-17 A	10-Jul-19 A	10-Jul-19	0
	Plan Development	499	01-May-17 A	09-Apr-19 A	09-Apr-19	0
	Land Use Permit	219	26-Feb-18 A	07-Jan-19 A	07-Jan-19	0
	Permits	84	12-Mar-19 A	10-Jul-19 A	10-Jul-19	0
	Construction, FF&E	924	01-Aug-17 A	11-Mar-21	15-Mar-21	2
	CRVI's	0	13-Sep-19 A	13-Sep-19 A	13-Sep-19	0
	Demo	364	01-Aug-17 A	31-Dec-18 A	31-Dec-18	0



Remaining Level of Effort | Baseline | Actual Work | Critical Remaining ...
Actual Level of Effort | Primary Baseline | Remaining Work | Milestone

Page 1 of 4

TASK filter: -Responsibility.

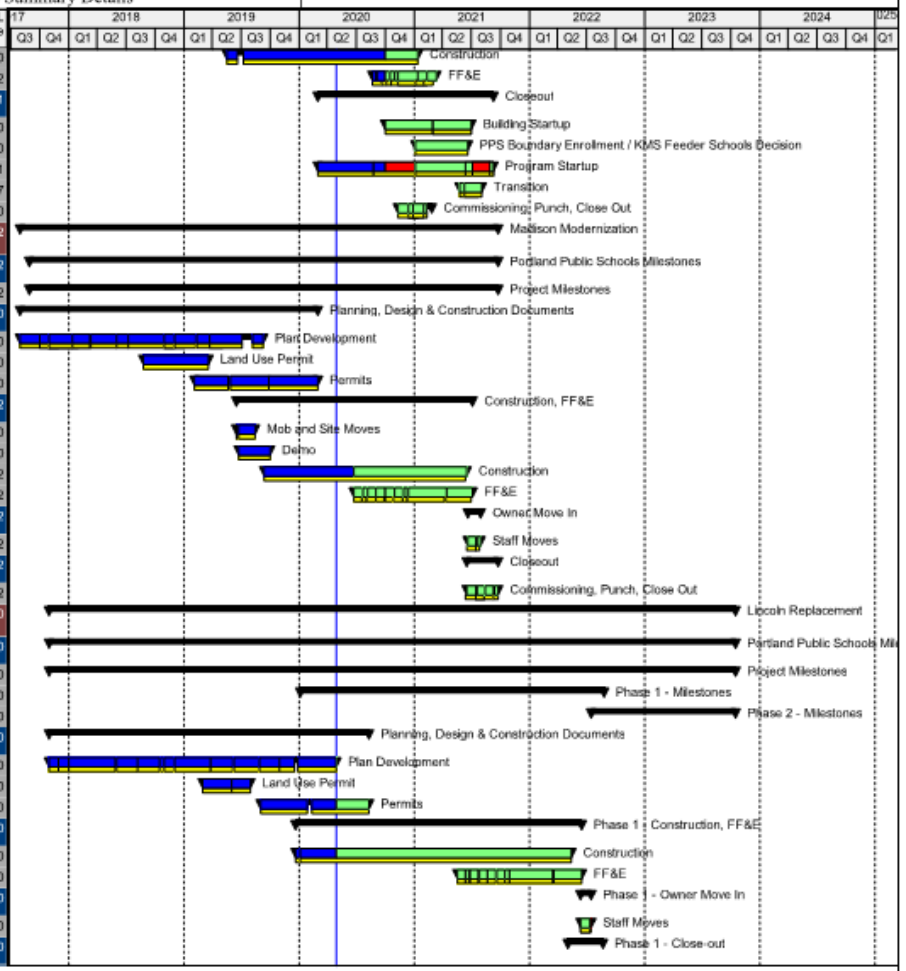
© Oracle Corporation

Schedule Updates – Modernization Projects

Portland Public Schools (PPS)
Master Planning Schedule
PPS - R2.1 BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL Project Finish	Variance - BL Project Finish Date
	Construction	421	20-May-19 A	13-Jan-21	13-Jan-21	0
	FF&E	140	24-Aug-20 A	11-Mar-21	15-Mar-21	2
	Closeout	396	02-Mar-20 A	10-Sep-21	26-Aug-21	-11
	Building Startup	192	01-Oct-20	01-Jul-21	01-Jul-21	0
	PPS Boundary Enrollment / KMS Feeder Schools Decision	120	04-Jan-21	21-Jun-21	21-Jun-21	0
	Program Startup	396	02-Mar-20 A	10-Sep-21	01-Jul-21	-51
	Transition	49	27-May-21	04-Aug-21	26-Aug-21	17
	Commissioning, Punch, Close Out	75	11-Nov-20	25-Feb-21	25-Feb-21	0
	Madison Modernization	1065	01-Aug-17 A	24-Sep-21	22-Sep-21	-2
	Portland Public Schools Milestones	1043	31-Aug-17 A	24-Sep-21	22-Sep-21	-2
	Project Milestones	1043	31-Aug-17 A	24-Sep-21	22-Sep-21	-2
	Planning, Design & Construction Documents	660	01-Aug-17 A	02-Mar-20 A	02-Mar-20	0
	Plan Development	540	01-Aug-17 A	10-Sep-19 A	10-Sep-19	0
	Land Use Permit	141	27-Aug-18 A	21-Mar-19 A	21-Mar-19	0
	Permits	273	04-Feb-19 A	02-Mar-20 A	02-Mar-20	0
	Construction, FF&E	526	17-Jun-19 A	06-Jul-21	02-Jul-21	-2
	Mob and Site Moves	42	17-Jun-19 A	15-Aug-19 A	15-Aug-19	0
	Demo	69	24-Jun-19 A	01-Oct-19 A	01-Oct-19	0
	Construction	448	16-Sep-19 A	15-Jun-21	11-Jun-21	-2
	FF&E	265	25-Jun-20	06-Jul-21	02-Jul-21	-2
	Owner Move In	30	21-Jun-21	30-Jul-21	28-Jul-21	-2
	Staff Moves	30	21-Jun-21	30-Jul-21	28-Jul-21	-2
	Closeout	73	16-Jun-21	24-Sep-21	22-Sep-21	-2
	Commissioning, Punch, Close Out	73	16-Jun-21	24-Sep-21	22-Sep-21	-2
	Lincoln Replacement	1536	01-Nov-17 A	17-Oct-23	17-Oct-23	0
	Portland Public Schools Milestones	1536	01-Nov-17 A	17-Oct-23	17-Oct-23	0
	Project Milestones	1536	01-Nov-17 A	17-Oct-23	17-Oct-23	0
	Phase 1 - Milestones	685	07-Jan-20 A	26-Aug-22	26-Aug-22	0
	Phase 2 - Milestones	327	18-Jul-22	17-Oct-23	17-Oct-23	0
	Planning, Design & Construction Documents	710	01-Nov-17 A	11-Aug-20	11-Aug-20	0
	Plan Development	637	01-Nov-17 A	01-May-20	01-May-20	0
	Land Use Permit	107	01-Mar-19 A	01-Aug-19 A	01-Aug-19	0
	Permits	241	03-Sep-19 A	11-Aug-20	11-Aug-20	0
	Phase 1 - Construction, FF&E	644	23-Dec-19 A	17-Jun-22	17-Jun-22	0
	Construction	619	23-Dec-19 A	13-May-22	13-May-22	0
	FF&E	285	17-May-21	17-Jun-22	17-Jun-22	0
	Phase 1 - Owner Move In	25	13-Jun-22	18-Jul-22	18-Jul-22	0
	Staff Moves	25	13-Jun-22	18-Jul-22	18-Jul-22	0
	Phase 1 - Close-out	81	02-May-22	22-Aug-22	22-Aug-22	0



Remaining Level of Effort | Actual Level of Effort | Baseline | Primary Baseline | Actual Work | Remaining Work | Critical Remaining ... | Milestone

Page 2 of 4

TASK filter: -Responsibility.

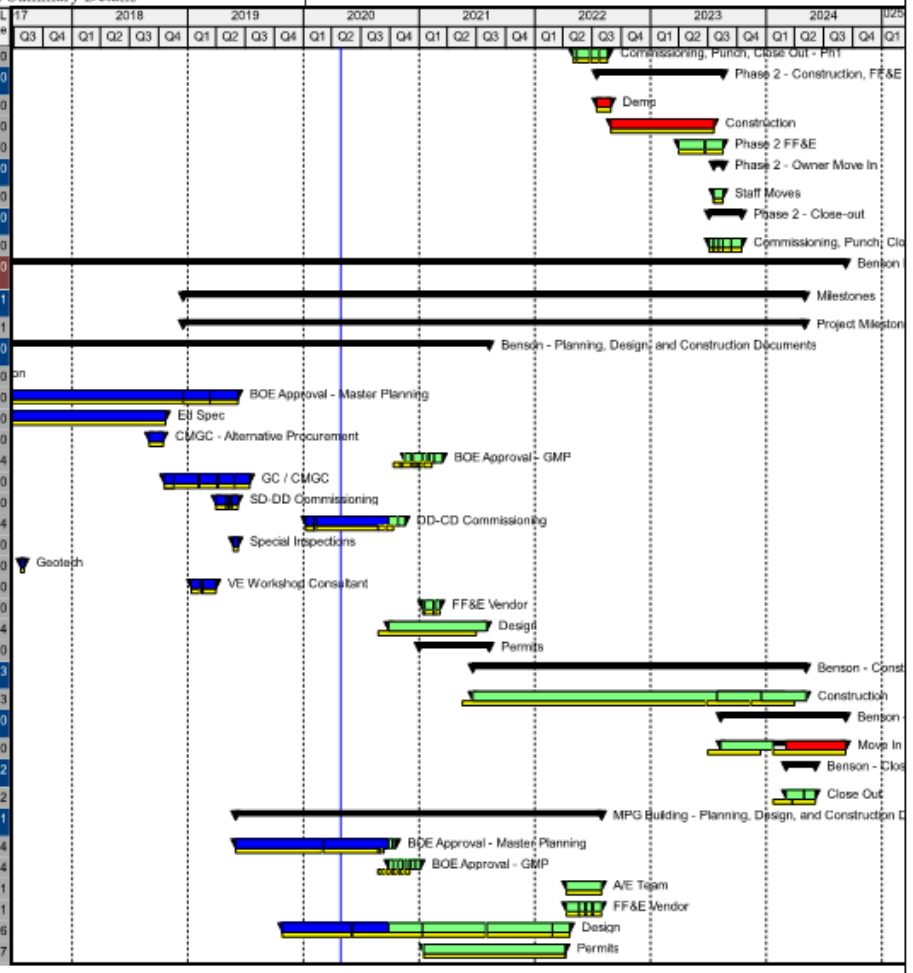
© Oracle Corporation

Schedule Updates – Modernization Projects

Portland Public Schools (PPS)
Master Planning Schedule
PPS - R2.1 BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL Project Finish	Variance - BL Project Finish Date
	Commissioning, Punch, Close Out - Ph1	81	02-May-22	22-Aug-22	22-Aug-22	0
	Phase 2 - Construction, FF&E	284	18-Jul-22	17-Aug-23	17-Aug-23	0
	Demo	31	18-Jul-22	29-Aug-22	29-Aug-22	0
	Construction	233	30-Aug-22	20-Jul-23	20-Jul-23	0
	Phase 2 FF&E	100	31-Mar-23	17-Aug-23	17-Aug-23	0
	Phase 2 - Owner Move In	20	21-Jul-23	17-Aug-23	17-Aug-23	0
	Staff Moves	20	21-Jul-23	17-Aug-23	17-Aug-23	0
	Phase 2 - Close-out	73	07-Jul-23	17-Oct-23	17-Oct-23	0
	Commissioning, Punch, Close Out - Ph2	73	07-Jul-23	17-Oct-23	17-Oct-23	0
	Benson HS	2046	11-Oct-16 A	09-Sep-24	09-Sep-24	0
	Milestones	1389	18-Dec-18 A	03-May-24	24-Aug-23	-181
	Project Milestones	1389	18-Dec-18 A	03-May-24	24-Aug-23	-181
	Benson - Planning, Design, and Construction Doc	1241	11-Oct-16 A	09-Aug-21	09-Aug-21	0
	A/E Selection	22	11-Oct-16 A	10-Nov-16 A	10-Nov-16	0
	BOE Approval - Master Planning	664	11-Nov-16 A	11-Jun-19 A	11-Jun-19	0
	Ed Spec	508	11-Nov-16 A	26-Oct-18 A	26-Oct-18	0
	CMGC - Alternative Procurement	32	03-Sep-18 A	19-Oct-18 A	19-Oct-18	0
	BOE Approval - GMP	85	17-Nov-20	18-Mar-21	30-Dec-20	-54
	GC / CMGC	186	20-Oct-18 A	18-Jul-19 A	18-Jul-19	0
	SD-DD Commissioning	49	01-Apr-19 A	10-Jun-19 A	10-Jun-19	0
	DD-CD Commissioning	220	10-Jan-20 A	17-Nov-20	05-Jun-20	-114
	Special Inspections	11	28-May-19 A	12-Jun-19 A	12-Jun-19	0
	Geotech	7	26-Jul-17 A	04-Aug-17 A	04-Aug-17	0
	VE Workshop Consultant	53	15-Jan-19 A	01-Apr-19 A	01-Apr-19	0
	FF&E Vendor	40	12-Jan-21	08-Mar-21	08-Mar-21	0
	Design	220	28-Sep-20	05-Aug-21	05-Oct-20	-214
	Permits	156	31-Dec-20	09-Aug-21	09-Aug-21	0
	Benson - Construction	751	21-Jun-21	06-May-24	01-Aug-24	63
	Construction	751	21-Jun-21	06-May-24	01-Aug-24	63
	Benson - Move In	282	11-Aug-23	09-Sep-24	09-Sep-24	0
	Move In	282	11-Aug-23	09-Sep-24	09-Sep-24	0
	Benson - Close Out	67	04-Mar-24	04-Jun-24	06-Jun-24	2
	Close Out	67	04-Mar-24	04-Jun-24	06-Jun-24	2
	MPG Building - Planning, Design, and Constructio	814	03-Jun-19 A	29-Jul-22	24-Jul-20	-521
	BOE Approval - Master Planning	352	03-Jun-19 A	19-Oct-20	08-May-20	-114
	BOE Approval - GMP	70	28-Sep-20	07-Jan-21	24-Jul-20	-114
	A/E Team	80	11-Apr-22	29-Jul-22	01-May-20	-581
	FF&E Vendor	80	11-Apr-22	29-Jul-22	26-Jun-20	-541
	Design	641	28-Oct-19 A	22-Apr-22	24-Apr-20	-516
	Permits	320	18-Jan-21	08-Apr-22	23-Apr-20	-507



Remaining Level of Effort | Baseline | Actual Work | Critical Remaining ...
Actual Level of Effort | Primary Baseline | Remaining Work | Milestone

Page 3 of 4

TASK filter: -Responsibility.

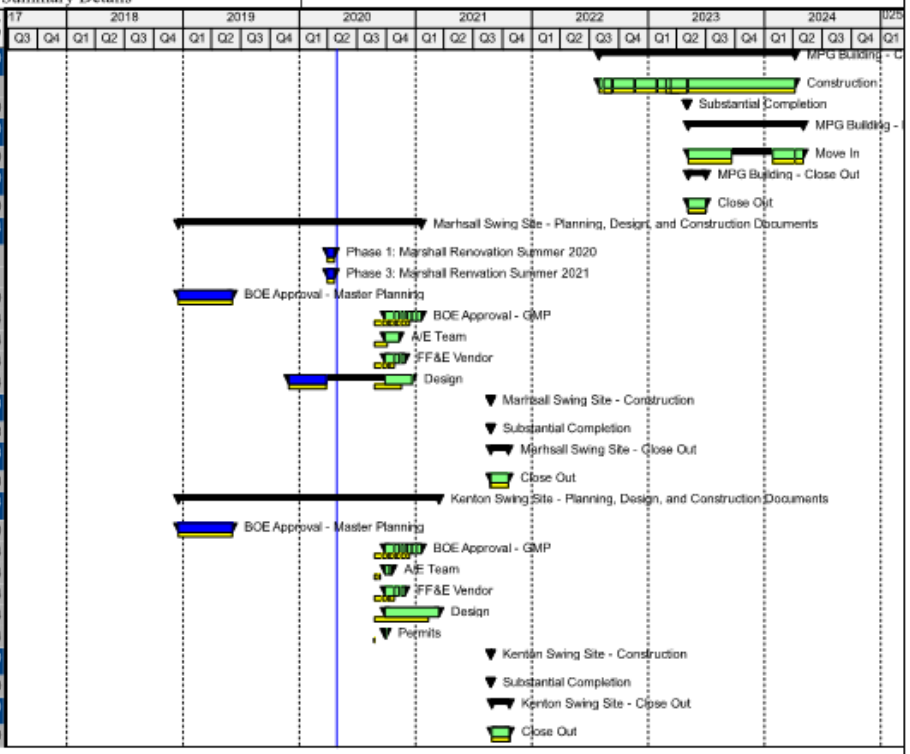
© Oracle Corporation

Schedule Updates – Modernization Projects

Portland Public Schools (PPS)
Master Planning Schedule
PPS - R2.1 BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL Project Finish	Variance - BL Project Finish Date
	MPG Building - Construction	440	01-Aug-22	05-Apr-24	27-Feb-23	-290
	Construction	440	01-Aug-22	05-Apr-24	24-Feb-23	-291
	Substantial Completion	0	05-May-23	05-May-23	27-Feb-23	-50
	MPG Building - Move In	260	08-May-23	03-May-24	14-Aug-23	-190
	Move In	260	08-May-23	03-May-24	14-Aug-23	-190
	MPG Building - Close Out	40	08-May-23	30-Jun-23	24-Apr-23	-50
	Close Out	40	08-May-23	30-Jun-23	24-Apr-23	-50
	Marhsall Swing Site - Planning, Design, and Const	532	18-Dec-18 A	21-Jan-21	05-Oct-20	-74
	Phase 1: Marshall Renovation Summer 2020	19	30-Mar-20 A	24-Apr-20 A		
	Phase 3: Marshall Renvation Summer 2021	19	30-Mar-20 A	24-Apr-20 A		
	BOE Approval - Master Planning	119	18-Dec-18 A	07-Jun-19 A	07-Jun-19	0
	BOE Approval - GMP	80	28-Sep-20	21-Jan-21	07-Aug-20	-114
	A/E Team	30	28-Sep-20	10-Nov-20	29-May-20	-114
	FF&E Vendor	45	28-Sep-20	01-Dec-20	19-Jun-20	-114
	Design	272	02-Dec-19 A	22-Dec-20	05-Oct-20	-54
	Marhsall Swing Site - Construction	0	24-Aug-21	24-Aug-21	15-Jul-21	-28
	Substantial Completion	0	24-Aug-21	24-Aug-21	15-Jul-21	-28
	Marhsall Swing Site - Close Out	40	25-Aug-21	19-Oct-21	09-Sep-21	-28
	Close Out	40	25-Aug-21	19-Oct-21	09-Sep-21	-28
	Kenton Swing Site - Planning, Design, and Constr	572	18-Dec-18 A	18-Mar-21	05-Oct-20	-114
	BOE Approval - Master Planning	119	18-Dec-18 A	07-Jun-19 A	07-Jun-19	0
	BOE Approval - GMP	80	28-Sep-20	21-Jan-21	07-Aug-20	-114
	A/E Team	15	28-Sep-20	19-Oct-20	08-May-20	-114
	FF&E Vendor	45	28-Sep-20	01-Dec-20	19-Jun-20	-114
	Design	120	28-Sep-20	18-Mar-21	05-Oct-20	-114
	Permits	4	28-Sep-20	02-Oct-20	23-Apr-20	-114
	Kenton Swing Site - Construction	0	27-Aug-21	27-Aug-21	05-May-23	440
	Substantial Completion	0	27-Aug-21	27-Aug-21	05-May-23	440
	Kenton Swing Site - Close Out	40	30-Aug-21	22-Oct-21	30-Jun-23	440
	Close Out	40	30-Aug-21	22-Oct-21	30-Jun-23	440



Remaining Level of Effort | Baseline | Actual Work | Critical Remaining ...
Actual Level of Effort | Primary Baseline | Remaining Work | Milestone

Page 4 of 4

TASK filter: -Responsibility.

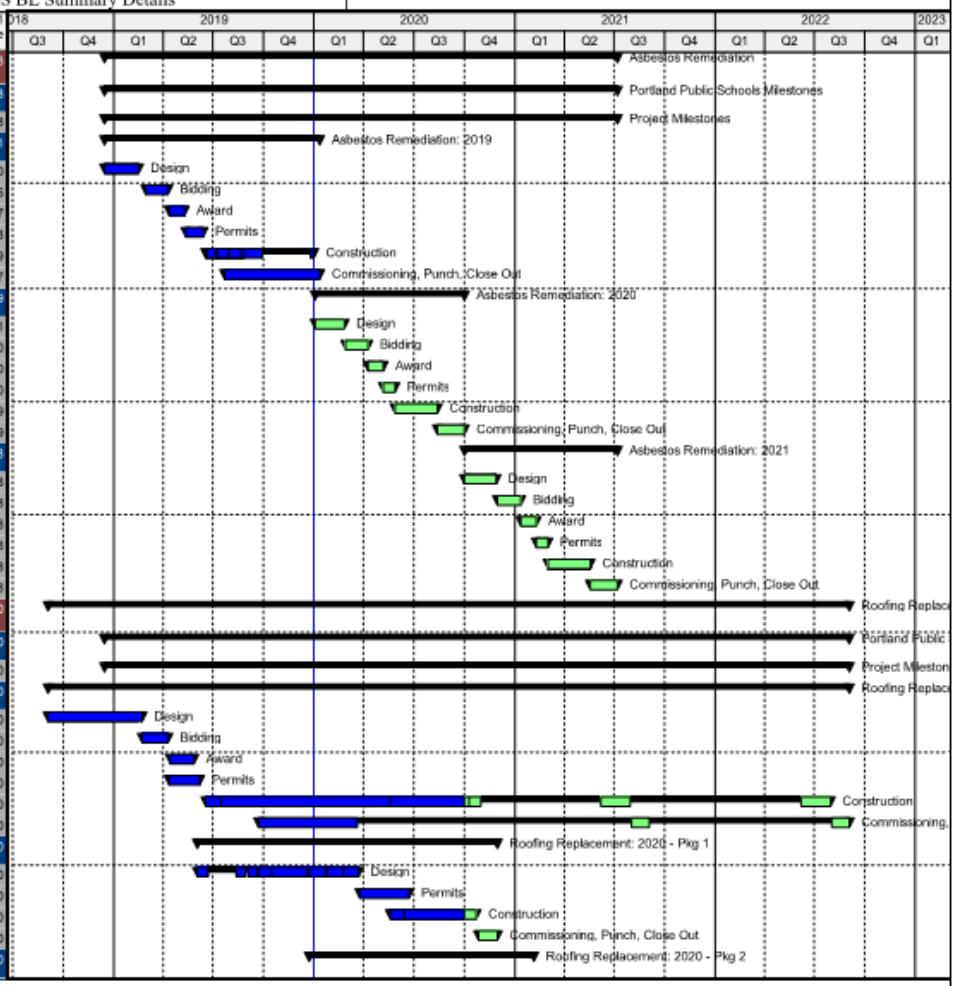
© Oracle Corporation

Schedule Updates – Health & Safety Projects

Portland Public Schools (PPS)
Master Planning Schedule
PPS - H+S BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL1 Finish	Variance - BL1 Finish Date
	Asbestos Remediation	667	15-Dec-18 A	06-Jul-21	27-May-21	-28
	Portland Public Schools Milestones	652	15-Dec-18 A	06-Jul-21	27-May-21	-28
	Project Milestones	652	15-Dec-18 A	06-Jul-21	27-May-21	-28
	Asbestos Remediation: 2019	280	15-Dec-18 A	12-Jan-20 A	14-Nov-19	-41
	Design	41	15-Dec-18 A	15-Feb-19 A	15-Feb-19	0
	Bidding	30	28-Feb-19 A	11-Apr-19 A	03-Jun-19	36
	Award	20	12-Apr-19 A	10-May-19 A	02-Jul-19	37
	Permits	23	13-May-19 A	14-Jun-19 A	17-Jul-19	23
	Construction	141	17-Jun-19 A	31-Dec-19 A	24-Sep-19	-69
	Commissioning, Punch, Close Out	119	22-Jul-19 A	12-Jan-20 A	14-Nov-19	-37
	Asbestos Remediation: 2020	195	02-Jan-20	01-Oct-20	20-Aug-20	-29
	Design	40	02-Jan-20	26-Feb-20	14-Jan-20	-31
	Bidding	30	27-Feb-20	08-Apr-20	26-Feb-20	-30
	Award	20	09-Apr-20	06-May-20	25-Mar-20	-30
	Permits	15	07-May-20	27-May-20	15-Apr-20	-30
	Construction	55	28-May-20	12-Aug-20	02-Jul-20	-29
	Commissioning, Punch, Close Out	35	13-Aug-20	01-Oct-20	20-Aug-20	-29
	Asbestos Remediation: 2021	195	02-Oct-20	06-Jul-21	27-May-21	-28
	Design	40	02-Oct-20	27-Nov-20	19-Oct-20	-28
	Bidding	30	30-Nov-20	12-Jan-21	01-Dec-20	-28
	Award	20	13-Jan-21	09-Feb-21	30-Dec-20	-28
	Permits	15	10-Feb-21	02-Mar-21	21-Jan-21	-28
	Construction	55	03-Mar-21	18-May-21	08-Apr-21	-28
	Commissioning, Punch, Close Out	35	19-May-21	06-Jul-21	27-May-21	-28
	Roofing Replacement	1026	03-Sep-18 A	02-Sep-22	02-Sep-22	0
	Portland Public Schools Milestones	955	15-Dec-18 A	02-Sep-22	02-Sep-22	0
	Project Milestones	955	15-Dec-18 A	02-Sep-22	02-Sep-22	0
	Roofing Replacement: 2019	1026	03-Sep-18 A	02-Sep-22	02-Sep-22	0
	Design	116	03-Sep-18 A	21-Feb-19 A	21-Feb-19	0
	Bidding	34	22-Feb-19 A	11-Apr-19 A	11-Apr-19	0
	Award	30	15-Apr-19 A	28-May-19 A	28-May-19	0
	Permits	39	12-Apr-19 A	07-Jun-19 A	07-Jun-19	0
	Construction	804	17-Jun-19 A	29-Jul-22	29-Jul-22	0
	Commissioning, Punch, Close Out	761	23-Sep-19 A	02-Sep-22	02-Sep-22	0
	Roofing Replacement: 2020 - Pkg 1	382	03-Jun-19 A	30-Nov-20	30-Oct-20	-20
	Design	203	03-Jun-19 A	23-Mar-20 A	23-Mar-20	0
	Permits	65	24-Mar-20 A	23-Jun-20 A	23-Jun-20	0
	Construction	113	19-May-20 A	23-Oct-20	25-Sep-20	-20
	Commissioning, Punch, Close Out	25	26-Oct-20	30-Nov-20	30-Oct-20	-20
	Roofing Replacement: 2020 - Pkg 2	289	23-Dec-19 A	05-Feb-21	05-Feb-21	0



Remaining Level of Effort | Primary Baseline | Remaining Work | Milestone
Actual Level of Effort | Actual Work | Critical Remaining Work | Summary

Page 1 of 5

TASK filter: All Activities

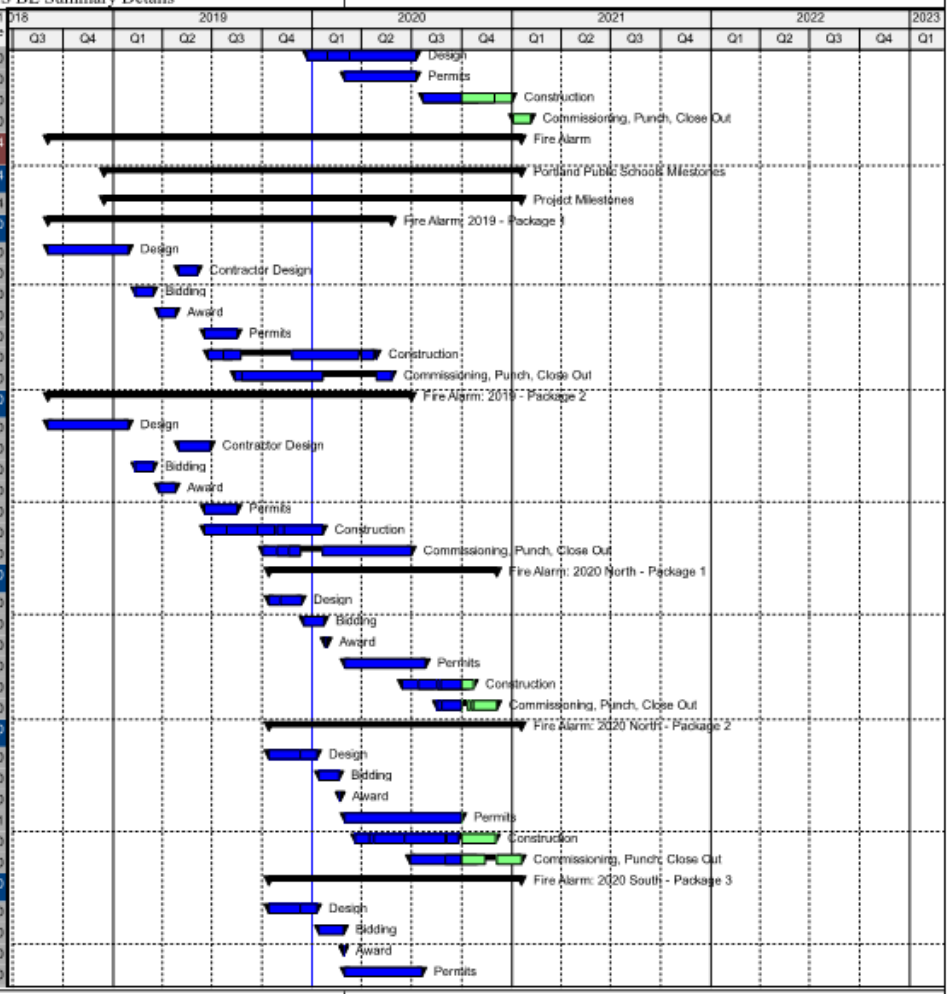
© Oracle Corporation

Schedule Updates – Health & Safety Projects

Portland Public Schools (PPS)
Master Planning Schedule
PPS - H+S BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL1 Finish	Variance - BL1 Finish Date
	Design	142	23-Dec-19 A	10-Jul-20 A	10-Jul-20	0
	Permits	94	02-Mar-20 A	10-Jul-20 A	10-Jul-20	0
	Construction	113	23-Jul-20 A	31-Dec-20	31-Dec-20	0
	Commissioning, Punch, Close Out	25	04-Jan-21	05-Feb-21	05-Feb-21	0
Fire Alarm		603	03-Sep-18 A	19-Jan-21	08-Feb-21	14
Portland Public Schools Milestones		532	15-Dec-18 A	19-Jan-21	08-Feb-21	14
	Project Milestones	532	15-Dec-18 A	19-Jan-21	08-Feb-21	14
Fire Alarm: 2019 - Package 1		435	03-Sep-18 A	25-May-20 A	25-May-20	0
	Design	100	03-Sep-18 A	30-Jan-19 A	30-Jan-19	0
	Contractor Design	23	01-May-19 A	04-Jun-19 A	04-Jun-19	0
	Bidding	23	12-Feb-19 A	14-Mar-19 A	14-Mar-19	0
	Award	23	25-Mar-19 A	25-Apr-19 A	25-Apr-19	0
	Permits	43	17-Jun-19 A	16-Aug-19 A	16-Aug-19	0
	Construction	212	25-Jun-19 A	27-Apr-20 A	27-Apr-20	0
	Commissioning, Punch, Close Out	199	12-Aug-19 A	25-May-20 A	25-May-20	0
Fire Alarm: 2019 - Package 2		462	03-Sep-18 A	01-Jul-20 A	01-Jul-20	0
	Design	100	03-Sep-18 A	30-Jan-19 A	30-Jan-19	0
	Contractor Design	41	01-May-19 A	28-Jun-19 A	28-Jun-19	0
	Bidding	23	12-Feb-19 A	14-Mar-19 A	14-Mar-19	0
	Award	23	25-Mar-19 A	25-Apr-19 A	25-Apr-19	0
	Permits	43	17-Jun-19 A	16-Aug-19 A	16-Aug-19	0
	Construction	148	17-Jun-19 A	20-Jan-20 A	20-Jan-20	0
	Commissioning, Punch, Close Out	190	02-Oct-19 A	01-Jul-20 A	01-Jul-20	0
Fire Alarm: 2020 North - Package 1		293	14-Oct-19 A	04-Dec-20	04-Dec-20	0
	Design	41	14-Oct-19 A	13-Dec-19 A	13-Dec-19	0
	Bidding	25	17-Dec-19 A	23-Jan-20 A	23-Jan-20	0
	Award	2	24-Jan-20 A	28-Jan-20 A	28-Jan-20	0
	Permits	106	02-Mar-20 A	28-Jul-20 A	28-Jul-20	0
	Construction	93	15-Jun-20 A	22-Oct-20	22-Oct-20	0
	Commissioning, Punch, Close Out	78	17-Aug-20 A	04-Dec-20	04-Dec-20	0
Fire Alarm: 2020 North - Package 2		322	14-Oct-19 A	18-Jan-21	18-Jan-21	0
	Design	59	14-Oct-19 A	10-Jan-20 A	10-Jan-20	0
	Bidding	28	13-Jan-20 A	20-Feb-20 A	20-Feb-20	0
	Award	0	21-Feb-20 A	21-Feb-20 A	21-Feb-20	0
	Permits	152	02-Mar-20 A	01-Oct-20	01-Sep-20	-21
	Construction	183	20-Mar-20 A	03-Dec-20	03-Dec-20	0
	Commissioning, Punch, Close Out	142	29-Jun-20 A	18-Jan-21	18-Jan-21	0
Fire Alarm: 2020 South - Package 3		323	14-Oct-19 A	19-Jan-21	19-Jan-21	0
	Design	59	14-Oct-19 A	10-Jan-20 A	10-Jan-20	0
	Bidding	33	13-Jan-20 A	27-Feb-20 A	27-Feb-20	0
	Award	0	28-Feb-20 A	28-Feb-20 A	28-Feb-20	0
	Permits	101	02-Mar-20 A	21-Jul-20 A	21-Jul-20	0



Remaining Level of Effort | Primary Baseline | Remaining Work | Milestone
Actual Level of Effort | Actual Work | Critical Remaining Work | Summary

Page 2 of 5

TASK filter: All Activities

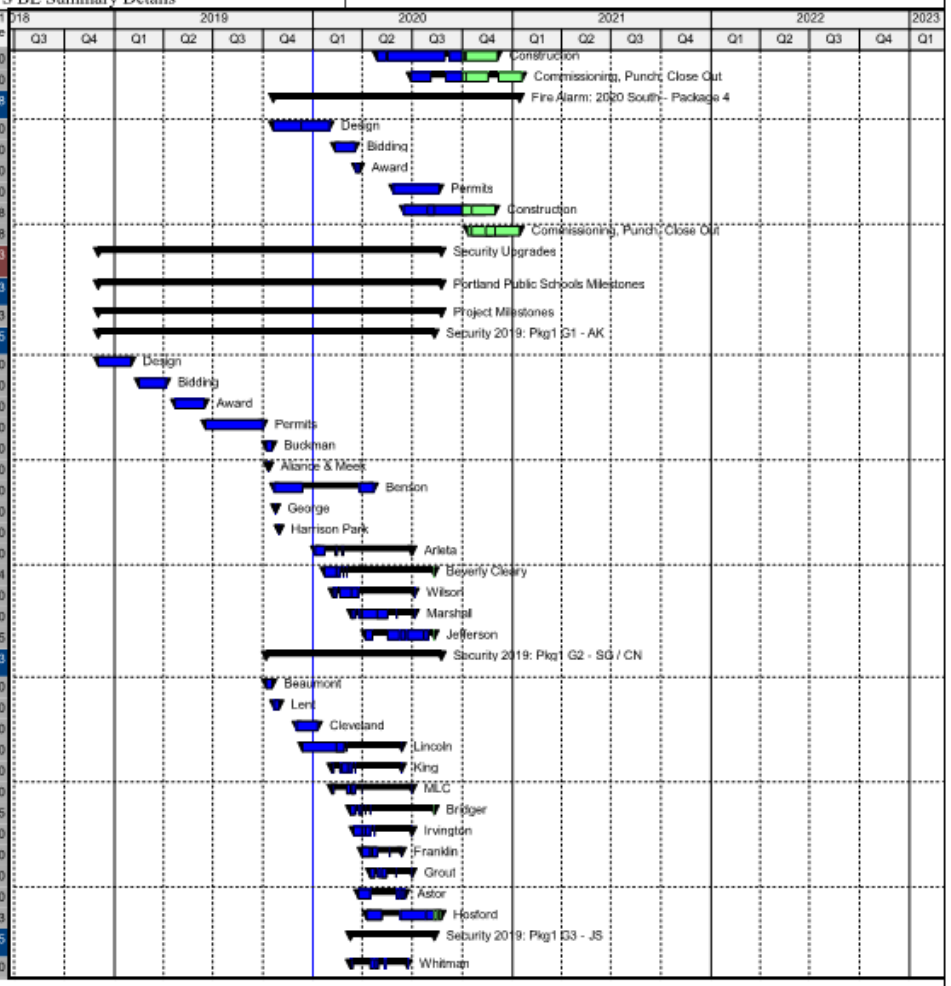
© Oracle Corporation

Schedule Updates – Health & Safety Projects

Portland Public Schools (PPS)
Master Planning Schedule
PPS - H+S BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL1 Finish	Variance - BL1 Finish Date
	Construction	158	27-Apr-20 A	04-Dec-20	04-Dec-20	0
	Commissioning, Punch, Close Out	143	29-Jun-20 A	19-Jan-21	19-Jan-21	0
	Fire Alarm: 2020 South - Package 4	314	21-Oct-19 A	13-Jan-21	08-Feb-21	18
	Design	68	21-Oct-19 A	30-Jan-20 A	30-Jan-20	0
	Bidding	27	11-Feb-20 A	19-Mar-20 A	19-Mar-20	0
	Award	4	20-Mar-20 A	26-Mar-20 A	26-Mar-20	0
	Permits	60	28-May-20 A	20-Aug-20 A	20-Aug-20	0
	Construction	117	17-Jun-20 A	30-Nov-20	24-Dec-20	18
	Commissioning, Punch, Close Out	65	12-Oct-20	13-Jan-21	08-Feb-21	18
	Security Upgrades	451	03-Dec-18 A	24-Aug-20	19-Aug-20	-3
	Portland Public Schools Milestones	440	03-Dec-18 A	24-Aug-20	19-Aug-20	-3
	Project Milestones	440	03-Dec-18 A	24-Aug-20	19-Aug-20	-3
	Security 2019: Pkg1 G1 - AK	442	03-Dec-18 A	11-Aug-20	04-Aug-20	-5
	Design	41	03-Dec-18 A	31-Jan-19 A	31-Jan-19	0
	Bidding	36	15-Feb-19 A	05-Apr-19 A	05-Apr-19	0
	Award	38	23-Apr-19 A	14-Jun-19 A	14-Jun-19	0
	Permits	74	17-Jun-19 A	30-Sep-19 A	30-Sep-19	0
	Buckman	8	07-Oct-19 A	17-Oct-19 A	17-Oct-19	0
	Alliance & Meek	0	11-Oct-19 A	11-Oct-19 A	11-Oct-19	0
	Benson	104	22-Oct-19 A	21-Apr-20 A	21-Apr-20	0
	George	1	23-Oct-19 A	23-Oct-19 A	23-Oct-19	0
	Harrison Park	1	31-Oct-19 A	31-Oct-19 A	31-Oct-19	0
	Arleta	102	06-Jan-20 A	30-Jun-20 A	30-Jun-20	0
	Beverly Cleary	115	23-Jan-20 A	11-Aug-20	04-Aug-20	-4
	Wilson	106	07-Feb-20 A	06-Jul-20 A	06-Jul-20	0
	Marshall	82	12-Mar-20 A	06-Jul-20 A	06-Jul-20	0
	Jefferson	92	06-Apr-20 A	11-Aug-20	04-Aug-20	-5
	Security 2019: Pkg1 G2 - SG / CN	231	07-Oct-19 A	24-Aug-20	19-Aug-20	-3
	Beaumont	8	07-Oct-19 A	17-Oct-19 A	17-Oct-19	0
	Lent	7	22-Oct-19 A	31-Oct-19 A	31-Oct-19	0
	Cleveland	23	02-Dec-19 A	08-Jan-20 A	08-Jan-20	0
	Lincoln	104	12-Dec-19 A	11-Jun-20 A	11-Jun-20	0
	King	93	03-Feb-20 A	11-Jun-20 A	11-Jun-20	0
	MLC	108	03-Feb-20 A	02-Jul-20 A	02-Jul-20	0
	Bridger	111	10-Mar-20 A	11-Aug-20	04-Aug-20	-5
	Irvington	77	16-Mar-20 A	30-Jun-20 A	30-Jun-20	0
	Franklin	51	01-Apr-20 A	11-Jun-20 A	11-Jun-20	0
	Grout	55	16-Apr-20 A	02-Jul-20 A	02-Jul-20	0
	Astor	61	25-Mar-20 A	18-Jun-20 A	18-Jun-20	0
	Hosford	98	09-Apr-20 A	24-Aug-20	19-Aug-20	-3
	Security 2019: Pkg1 G3 - JS	112	09-Mar-20 A	11-Aug-20	04-Aug-20	-5
	Whitman	76	09-Mar-20 A	23-Jun-20 A	23-Jun-20	0



Remaining Level of Effort | Primary Baseline | Remaining Work | Milestone
Actual Level of Effort | Actual Work | Critical Remaining Work | Summary

Page 3 of 5

TASK filter: All Activities

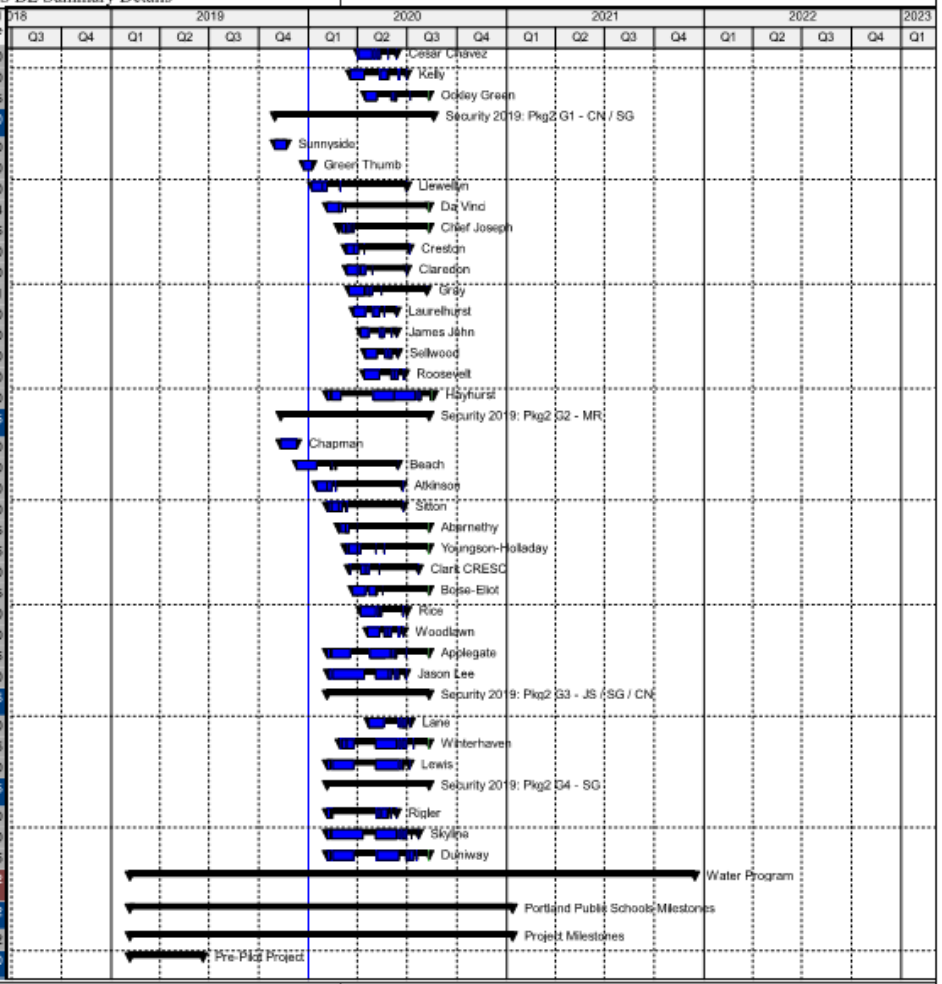
© Oracle Corporation

Schedule Updates – Health & Safety Projects

Portland Public Schools (PPS)
Master Planning Schedule
PPS - H+S BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL1 Finish	Variance - BL1 Finish Date
	Cesar Chavez	50	02-Apr-20 A	11-Jun-20 A	11-Jun-20	0
	Kelly	75	18-Mar-20 A	01-Jul-20 A	01-Jul-20	0
	Ockley Green	86	14-Apr-20 A	11-Aug-20	04-Aug-20	-5
	Security 2019: Pkg2 G1 - CN / SG	210	31-Oct-19 A	19-Aug-20	19-Aug-20	0
	Sunnyside	12	31-Oct-19 A	20-Nov-19 A	20-Nov-19	0
	Green Thumb	9	23-Dec-19 A	06-Jan-20 A	06-Jan-20	0
	Llewellyn	126	07-Jan-20 A	30-Jun-20 A	30-Jun-20	0
	Da Vinci	108	05-Feb-20 A	11-Aug-20	04-Aug-20	-4
	Chief Joseph	121	25-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Creston	85	09-Mar-20 A	06-Jul-20 A	06-Jul-20	0
	Claredon	80	12-Mar-20 A	02-Jul-20 A	02-Jul-20	0
	Gray	103	16-Mar-20 A	06-Aug-20 A	04-Aug-20	-1
	Laurelhurst	56	25-Mar-20 A	11-Jun-20 A	11-Jun-20	0
	James John	47	07-Apr-20 A	11-Jun-20 A	11-Jun-20	0
	Sellwood	43	15-Apr-20 A	15-Jun-20 A	15-Jun-20	0
	Roosevelt	54	13-Apr-20 A	26-Jun-20 A	26-Jun-20	0
	Hayhurst	142	04-Feb-20 A	19-Aug-20	19-Aug-20	0
	Security 2019: Pkg2 G2 - MR	197	11-Nov-19 A	11-Aug-20	04-Aug-20	-5
	Chapman	18	11-Nov-19 A	10-Dec-19 A	10-Dec-19	0
	Beach	107	10-Dec-19 A	15-Jun-20 A	15-Jun-20	0
	Atkinson	114	15-Jan-20 A	23-Jun-20 A	23-Jun-20	0
	Sitton	102	03-Feb-20 A	24-Jun-20 A	24-Jun-20	0
	Abernathy	121	25-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Youngson-Holladay	111	10-Mar-20 A	11-Aug-20	04-Aug-20	-5
	Clark CRESC	91	17-Mar-20 A	22-Jul-20 A	22-Jul-20	0
	Boise-Eliot	102	23-Mar-20 A	11-Aug-20	04-Aug-20	-5
	Rice	61	07-Apr-20 A	30-Jun-20 A	30-Jun-20	0
	Woodlawn	48	20-Apr-20 A	25-Jun-20 A	25-Jun-20	0
	Applegate	136	04-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Jason Lee	103	06-Feb-20 A	30-Jun-20 A	30-Jun-20	0
	Security 2019: Pkg2 G3 - JS / SG / CN	136	04-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Lane	56	21-Apr-20 A	08-Jul-20 A	08-Jul-20	0
	Winterhaven	119	27-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Lewis	109	04-Feb-20 A	06-Jul-20 A	06-Jul-20	0
	Security 2019: Pkg2 G4 - SG	136	04-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Rigler	92	04-Feb-20 A	11-Jun-20 A	11-Jun-20	0
	Skyline	121	04-Feb-20 A	22-Jul-20 A	22-Jul-20	0
	Duniway	136	04-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Water Program	735	04-Feb-19 A	14-Dec-21	12-Nov-21	-22
	Portland Public Schools Milestones	495	04-Feb-19 A	12-Jan-21	09-Dec-20	-22
	Project Milestones	495	04-Feb-19 A	12-Jan-21	09-Dec-20	-22
	Pre-Pilot Project	97	04-Feb-19 A	19-Jun-19 A	19-Jun-19	0



Remaining Level of Effort | Primary Baseline | Remaining Work | Milestone
Actual Level of Effort | Actual Work | Critical Remaining Work | Summary

Page 4 of 5

TASK filter: All Activities

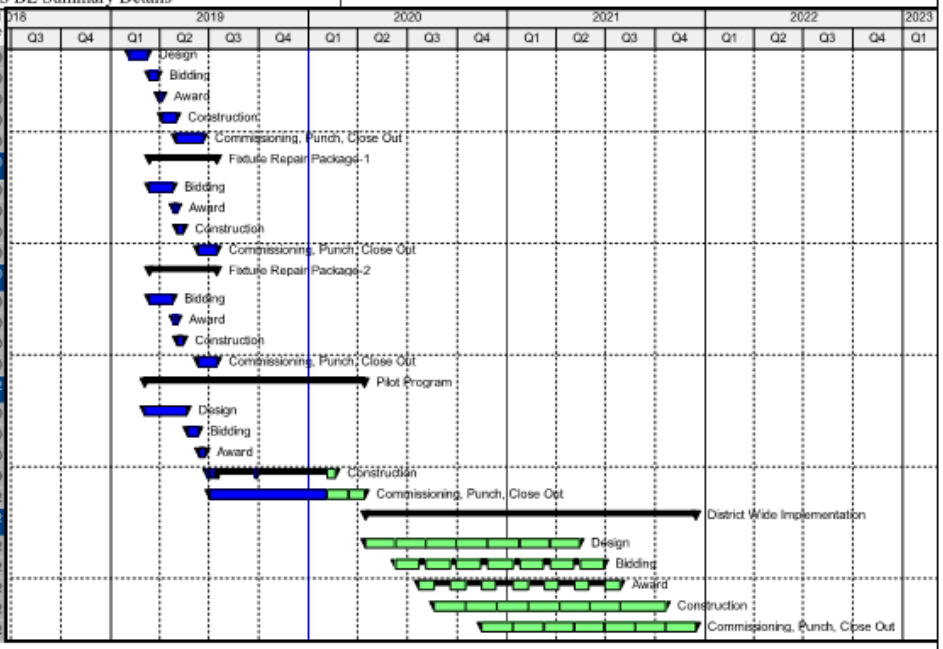
© Oracle Corporation

Schedule Updates – Health & Safety Projects

Portland Public Schools (PPS)
Master Planning Schedule
PPS - H+S BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL1 Finish	Variance - BL1 Finish Date
	Design	25	04-Feb-19 A	08-Mar-19 A	08-Mar-19	0
	Bidding	12	13-Mar-19 A	28-Mar-19 A	28-Mar-19	0
	Award	5	29-Mar-19 A	04-Apr-19 A	04-Apr-19	0
	Construction	18	05-Apr-19 A	30-Apr-19 A	30-Apr-19	0
	Commissioning, Punch, Close Out	35	01-May-19 A	19-Jun-19 A	19-Jun-19	0
	Fixture Repair Package-1	88	12-Mar-19 A	15-Jul-19 A	15-Jul-19	0
	Bidding	33	12-Mar-19 A	25-Apr-19 A	25-Apr-19	0
	Award	5	26-Apr-19 A	02-May-19 A	02-May-19	0
	Construction	7	03-May-19 A	13-May-19 A	13-May-19	0
	Commissioning, Punch, Close Out	25	10-Jun-19 A	15-Jul-19 A	15-Jul-19	0
	Fixture Repair Package-2	88	12-Mar-19 A	15-Jul-19 A	15-Jul-19	0
	Bidding	33	12-Mar-19 A	25-Apr-19 A	25-Apr-19	0
	Award	5	26-Apr-19 A	02-May-19 A	02-May-19	0
	Construction	7	03-May-19 A	13-May-19 A	13-May-19	0
	Commissioning, Punch, Close Out	25	10-Jun-19 A	15-Jul-19 A	15-Jul-19	0
	Pilot Program	283	04-Mar-19 A	13-Apr-20	12-Mar-20	-22
	Design	56	04-Mar-19 A	20-May-19 A	20-May-19	0
	Bidding	14	22-May-19 A	11-Jun-19 A	11-Jun-19	0
	Award	7	14-Jun-19 A	24-Jun-19 A	24-Jun-19	0
	Construction	162	28-Jun-19 A	19-Feb-20	23-Jan-20	-19
	Commissioning, Punch, Close Out	198	02-Jul-19 A	13-Apr-20	12-Mar-20	-22
	District Wide Implementation	432	14-Apr-20	14-Dec-21	12-Nov-21	-22
	Design	280	14-Apr-20	14-May-21	14-Apr-21	-22
	Bidding	272	09-Jun-20	29-Jun-21	28-May-21	-22
	Award	260	23-Jul-20	27-Jul-21	25-Jun-21	-22
	Construction	300	20-Aug-20	19-Oct-21	17-Sep-21	-22
	Commissioning, Punch, Close Out	280	16-Nov-20	14-Dec-21	12-Nov-21	-22



Remaining Level of Effort | Primary Baseline | Remaining Work | Milestone
Actual Level of Effort | Actual Work | Critical Remaining Work | Summary

Page 5 of 5

TASK filter: All Activities

© Oracle Corporation

2012/2017 Bond Program

Operations

- **Project Operational Closeouts**
  - First draft of Franklin HS alternative procurement post-completion analysis is under review.
  - Final closeout audit of Roosevelt is complete; contractor has accepted audit findings. Staff continue to work on contract and financial close-out. Post-completion analysis will be completed after CM/GC contract is financially closed.
- **Audits**
  - Staff are making good progress on implementing important prior audit recommendations regarding document management and lessons learned.
  - The Year 3 performance audit will begin field investigations in late October.

Staffing

- **Staffing**
  - PM1s (three positions): In final hiring steps.
  - Senior Manager, Business Operations: In final hiring steps.
  - eBuilder administrator: Interviewing.
  - Director of Construction: Interviewing.
  - Contracts analyst: Reviewing applicants.
- **Contracted Program/Construction Management**
  - BOE approval will be requested to direct-contract existing CBRE|Heery CMs for 2017 Modernization projects through the end of those projects for continuity purposes.
  - On-call contracts remain available for construction management of H&S projects from four previously selected firms.
  - OSM will be issuing an RFP for program management consulting services separately.

Better Than / Worse Than Planned

- **Better Than:**
  - Recruitments are receiving more well-qualified applicants than anticipated.
- **Worse Than:**
  - It has taken longer to move forward on staff recruitments due to District-wide impacts of the pandemic.

Project Materials

SCHOOL BUILDING IMPROVEMENT BOND

Kellogg MS Replacement

Accomplishments

- **Construction:** Exterior and interior building systems are complete on the Gym, Commons & Administrative Wing and significantly complete on the Learning Suites.
- **M/E/P systems:** With power and data service to the building having been completed, major Mechanical/Electrical/Plumbing (M/E/P) systems are being finalized and started up for the first time as part of the building commissioning process.
- **Equipment:** Equipment installation is significantly complete on the Stage, in the Gym, in the Kitchen, and in the Learning Suites.
- **On-Site Work:** On-site work is significantly underway, including curbs and paving at parking lot, bus turnaround, and service drive, as well as site sidewalks and site walls.

Next Steps

- **On-site work:** The north side of the site will continue to take shape, and clearing and grading for walking paths and the play field will be significantly underway.
- **Solar PV:** The Gym roof solar PV infrastructure will be completed and the solar PV panels will be installed.
- **Technology + FF&E:** District technology will arrive at the site for installation in the building, and furniture, fixtures, and equipment (FF&E) orders will be finalized for arrival in early 2021 when building construction has been completed.
- **O&M:** O&M document list and material will be finalized for review by Owner and A/E teams.

Better Than / Worse Than Planned

- **Better Than:** While typically a tricky process, the project team's close and continued coordination with utility companies has allowed power & data/telecom installation to be completed on or ahead of schedule.
- **Better Than:** The contractor team has exceeded the project team's expectations in their craftsmanship as they prepare and reinstall material salvaged from the old Kellogg in the new building.
- **Worse Than:** With brand new PPS Middle School Performing Arts standards, the process of fine-tuning the specification and installation of equipment for these spaces at Kellogg has been more difficult than anticipated.

Safety

- **August Man Hours:** 17,016
- **Man Hours to Date:** 115,546
- **Reportable Accidents to Date:** 2 *(no new since last report)*
- **OSHA Recordable Accidents:** 0
- **Incident Rate:** 0

Kellogg MS Replacement

Aerial Photos / October, 2020

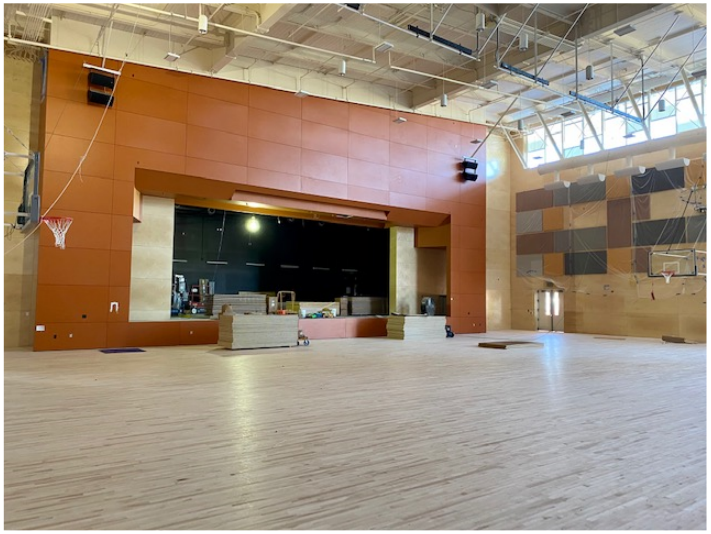
Kellogg MS Replacement

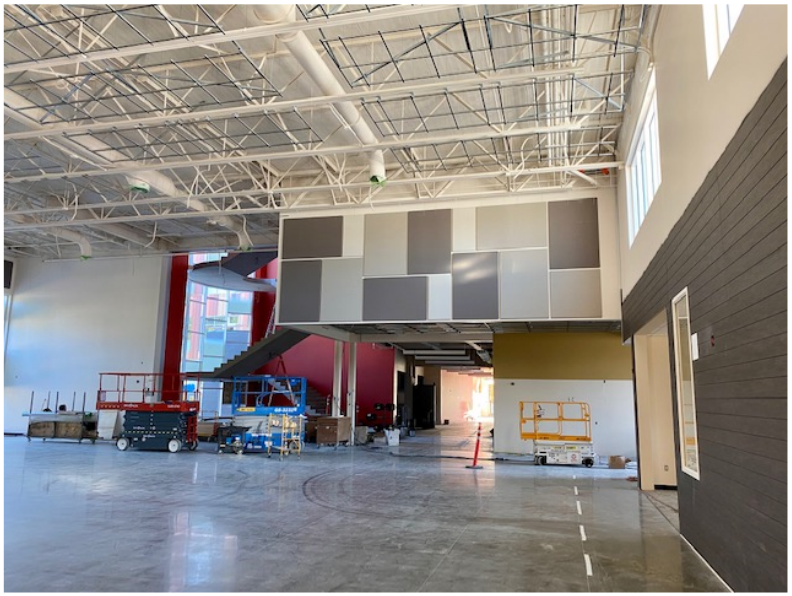
Learning Suites / October, 2020

Kellogg MS Replacement

Courtyard, Entry, Covered Play & North Site / October, 2020

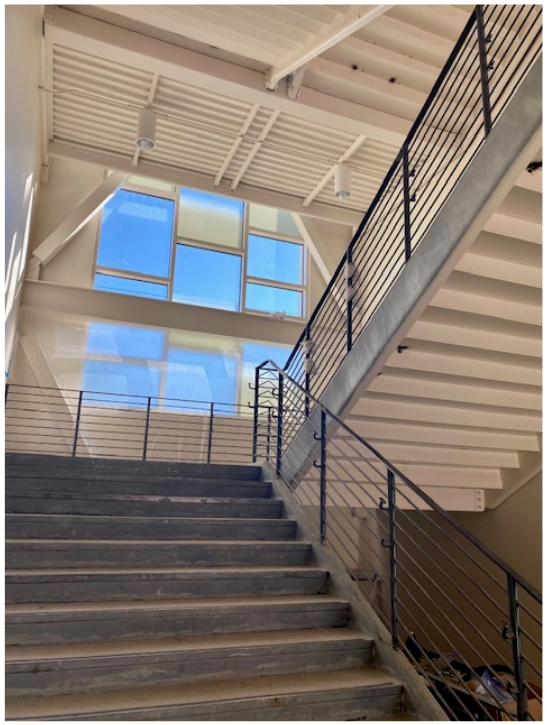
Kellogg MS Replacement





Gym/Performing Arts & Commons / October, 2020

Kellogg MS Replacement



Learning Suites Stair & Extended Learning / October, 2020

Kellogg MS Replacement

View of Roof & Solar PV Array / October, 2020

Madison HS Modernization

Accomplishments

- **Construction:**
  - Public Works Permit obtained
  - Paint and tile started in Sector E
  - Beacon curtain wall installed
  - New brick on theater
  - Working overtime to recover from COVID and wildfire shut downs

Next Steps

- **Construction:**
  - Permanent power in early November
  - South field turf
  - Placing furniture order in December
  - Elevator installation October

Better Than / Worse Than Planned

- **Better Than:**
  - Subcontractor commitment to schedule
  - Team collaboration
  - Commissioning agent involvement
  - Adapting to COVID environment
- **Worse Than:**
  - Obtaining Public Works Permit
  - Late design changes
  - Numerous schedule impacts and all weather days have been utilized

Safety

- **Man Hours to Date:** 413,121 as of October 8, 2020
- **Reportable Accidents to Date:** 2 *(1 new since last report)*
- **OSHA Recordable Incidents:** 2 *(1 new since last report)*
- **Incident Rate:** 0.98

Madison HS Modernization

Aerial photo – October 8, 2020

Madison HS Modernization

Aerial photo – October 8, 2020

Madison HS Modernization

Aerial photo – October 8, 2020

Madison HS Modernization

MADISON HIGH SCHOOL RISK CATEGORIES FOR CONTINGENCY USAGE										
	Projection June 2019		*October 2019*		*January 2020*		*October 2020*			
Category	Low	High	Identified Risks	Actual	Identified Risks	Actual	Identified Risks	Final Changes	Pending Changes	Risks + Pending
Design/Engineering	$ 750,000	$ 5,000,000	$ 3,365,000	$ 1,531,202	$ 2,250,000	$ 538,459	$ 1,950,000	$ 1,604,632	$ 829,749	$ 2,779,749
Existing Conditions	$ 1,500,000	$ 5,000,000	$ 2,340,000	$ 204,922	$ 2,190,000	$ 642,770	$ 455,000	$ 1,342,875	$ 232,500	$ 687,500
Jurisdictional	$ 250,000	$ 2,000,000	$ 1,840,000	$ -	$ 1,640,000	$ 1,513,334	$ 325,000	$ 2,891,901	$ 430,500	$ 755,500
Schedule	$ 250,000	$ 3,000,000	$ 1,085,000	$ 143,669	$ 1,100,000	$ 134,718	$ 250,000	$ 237,368	$ -	$ 250,000
Scope/Program	$ 1,000,000	$ 3,000,000	$ 650,000	$ -	$ 625,000	$ 457,814	$ 700,000	$ 267,809	$ 1,218,331	$ 1,918,331
Trade/Procurement	$ 600,000	$ 1,500,000	$ 1,500,000	$ -	$ 1,550,000	$ 298,496	$ 1,050,000	$ 1,174,682	$ 342,980	$ 1,392,980
Other	$ -	$ -	$ 200,000	$ -	$ 1,150,000	$ -	$ -	$ -	$ -	$ -
COVID							$ -	$ 229,798	$ 240,851	$ 240,851
TOTAL	$ 4,350,000	$ 19,500,000	$ 10,980,000	$ 1,879,793	$ 10,505,000	$ 3,585,591	$ 4,730,000	$ 7,749,065	$ 3,294,911	$ 8,024,911

	Original	Used to Date	Remaining
Contractor Contingency in GMP	$ 5,831,520	$ (2,430,360)	$ 3,401,160
Owner Contingency in GMP	$ 7,289,400	$ (2,253,216)	$ 5,036,184
Owner Contingency Outside GMP	$ 6,983,240	$ (2,667,717)	$ 4,315,523
TOTAL PROJECT CONTINGENCY	$ 20,104,160	$ (7,351,293)	$ 12,752,867

Notes:

1. The amount of the original owner contingency outside the GMP was corrected from previous versions of this chart because a projected budget infusion from ETO incentives was inadvertantly excluded.
2. The value of actual owner contingency in the GMP used to date is $5,088,907. $3M was moved into the contract in Sept 2020 from the project contingency.

With $12.75M in remaining project contingency and $8.0M in pending change orders and identified risks, OSM is projecting up to $4.75M could be utilized for unknown future issues

Madison HS Modernization

- **Mitigated Risks**
  - Abatement is complete
  - All permits obtained
  - Structure is topped out
  - Permanent power scheduled for early November

- **Major Risks to be Addressed**
  - Schedule compression / trade stacking
  - Buying back schedule float through overtime
  - Building name change

Full Risk log is included separately.

Lincoln HS Replacement

Accomplishments

- **Design:**
  - Construction administration and permit review ongoing
  - Phase 2 design work for Teen Parent Center and Field Storage.
- **Construction:**
  - Slab on grade is 90% complete.
  - Concrete tilt panel erection of auditorium shell complete.
  - Structural steel and CMU start in September.

Next Steps

- **Permits:**
  - Permit 2 review in 5th round of comments. Approval expected by end of October.
  - Storm Water and Public Works permits still in review.
- **Student Engagement:**
  - Construction Management Class
  - Art/Artifacts/School Identity/Interior Signage
  - Bora Equity Team/Critical Race Theory and Spatial Design
  - Artist Mural Project with RACC

Better Than / Worse Than Planned

- **Better Than:**
  - Concrete tilt panels.
  - Structural steel erection.
  - Deep footings, piers and pilings.
- **Worse Than:**
  - Building permit and Public Works permit.
  - Precast concrete detailing with fabricator.

Safety

- **Worker Hours to Date:** 51,074 as of August 31, 2020.
- **Reportable Accidents to Date:** 0
- **OSHA Recordable Incidents:** 0
- **Incident Rate:** 0.00
- **Average # of Workers On Site:** 33

Lincoln HS Replacement

Aerial photo – Oct. 9, 2020

Lincoln HS Replacement

Site photo – Oct. 14, 2020

Lincoln HS Replacement

Steel column with Sideplate connection.

Tilt Panels of the auditorium shell.

Site photos – October 2020

Benson Polytechnic HS Modernization

Accomplishments

- **100% Design Development (DD):** package issued
- **SHPO:**
  - Clearance Form submitted
  - Determination of Effect received
- **Pre-construction work:**
  - Summer 2020 investigations for design coordination
  - Historic wall restoration
  - Start of building cleanout
- **Stakeholders:**
  - Design review
  - Addition of VP of Construction to Benson administration
- **GMP Development:**
  - Owner's Project Requirements (OPR) development

Next Steps

- **100% DD Construction** estimates
- **50% Construction Document (CD)** package
- **Permits:** Demolition permit submission
- **HLC Type II:** Submitting design details and modifications for front entry lighting, fence & gate, Bldg H wall & G2 wall.
- **State Historic Preservation Office (SHPO):** SHPO Memorandum of Agreement & mitigation
- **Parks NPUP:** review & coordination for proposed Buckman Field connections
- **Community Engagement:** DAG November project update

Better Than / Worse Than Planned

- **Better Than:**
  - Multi-layer paint removal at main building historic wall & subsequent condition of brick
  - Design review meetings via online google meetings
  - Information gained from on site building investigation
- **Worse Than:**
  - Covid impacts and delays on building cleanout, including CTE Equipment planning & consolidation
  - Design complexity of the historic renovation and technical CTE shop design
  - Multiple swing site coordination

Benson HS Modernization

SUMMER WORK UPDATE

+ Blue paint removal at east elevation of main building complete, where new social courtyard will be located
+ Completion of structural tests and other due-diligence
+ Information assisting design team and CMGC for existing conditions understanding and sharpening pencils on risks, contingencies and allowances

Benson HS Modernization

DESIGN DEVELOPMENT

Benson HS Modernization

DESIGN DEVELOPMENT

Benson HS Modernization

DESIGN DEVELOPMENT

Benson HS Modernization

DESIGN DEVELOPMENT

Benson HS Modernization

DESIGN DEVELOPMENT

Benson: Multiple Pathways Building

Accomplishments

- **Student Engagement:**
  - Design team developing opportunity with Your Street / Your Voice, program to empower students through design and urban planning
- **Design**
  - Sustainability charrette completed August 2020
  - Team completed Mass Timber workshops in August
- **Community Engagement**
  - Completed DAG meetings #8, October 7, 2020
- **Budget**
  - Design and Construction teams working to align Master Plan with Andersen estimates

Next Steps

- **Design:** Bassetti is working to simplify building exterior and align building shell with parking below
- **Stakeholder Engagement:**
  - Working with MPG to confirm capacity studies and Kenton Planning
  - Working with MPG staff to facilitate building clean out and move activities
- **Site development:** Due to site constraints defined by PBOT and existing trees, Master plan is being revised
- **Team exploring multiple construction methods**; Mass Timber construction is one option consideration; supports sustainability and trauma informed design goals

Better Than / Worse Than Planned

- **Better Than:**
  - Opportunities to achieve aggressive sustainability goals
  - Stakeholder feedback and involvement with the process
  - Collaboration of design and construction teams to achieve project goals
- **Worse Than:**
  - PBOT feedback that no vehicular access is permitted on NE 16th
  - Initial cost estimates from Andersen based on Master Plan

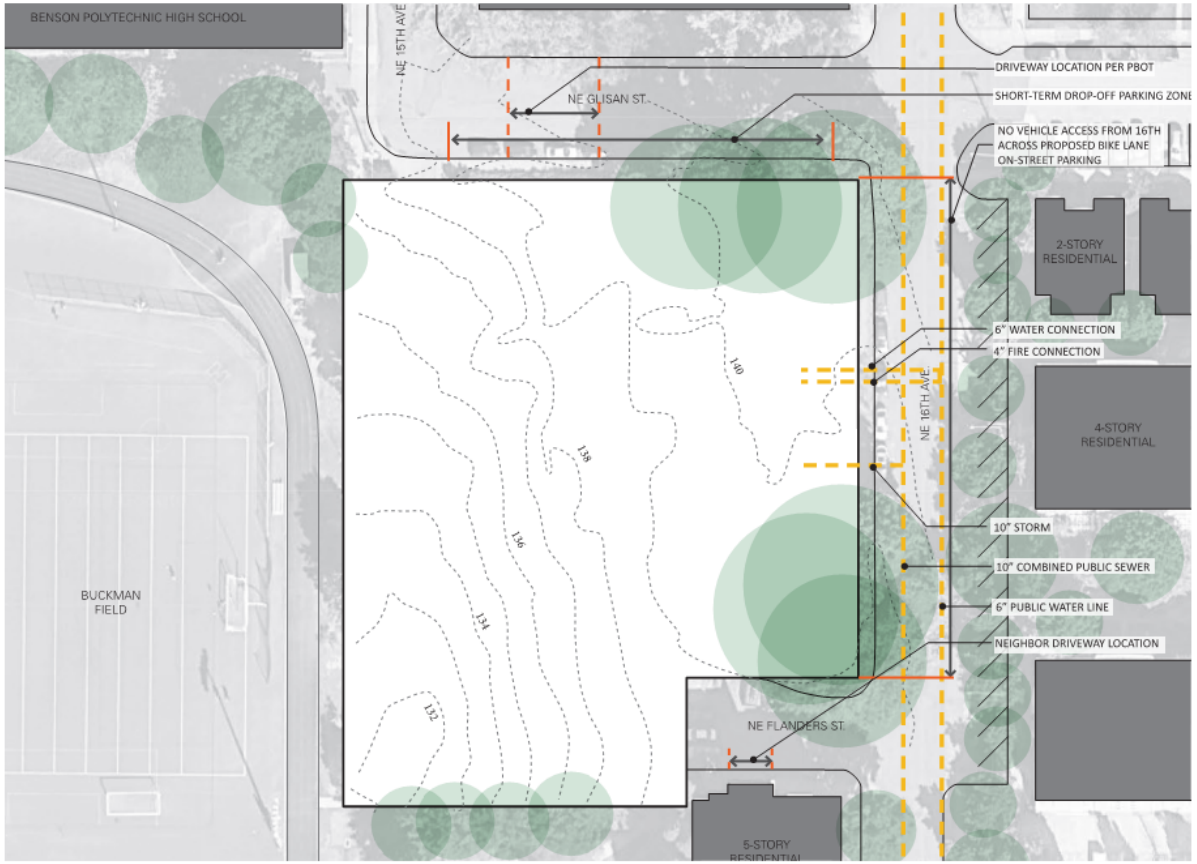
Benson: Multiple Pathways Building

SCHEMATIC DESIGN

MASTERPLAN UPDATE / PHYSICAL CONSTRAINTS

SITE CONSTRAINTS:

+ Driveway location mid-block at NE Glisan per Portland Bureau of Transportation (PBOT)
+ Short-term drop-off parking zone along NE Glisan okay
+ No vehicle access from NE 16th across proposed bike lane per PBOT
+ Public utilities run down NE 16th
+ Water, fire, stormwater connections are located off NE 16th
+ Neighbor driveway - south edge of Flanders

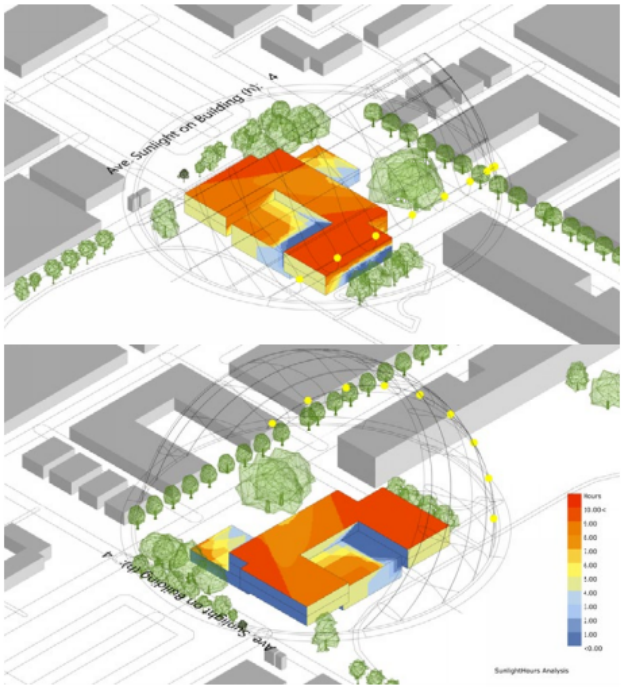


bassetti architects

Benson: Multiple Pathways Building

SCHEMATIC DESIGN

PROJECT UPDATE / SUSTAINABILITY CHARRETTE



PRIORITIES:

+ **LEED Gold Target, Energy Use Intensity (EUI) Goal: 27, Low or zero use of fossil fuels**
+ Integrating curriculum, teaching, and learning with the building design.
+ Connecting to Nature.
+ Stormwater - Vegetative planters and planted roofs are an opportunity to integrate with the Connecting to Nature goal.
+ Incorporating the history and ecology of the building site - engage with tribal representatives and educators
+ Low-embodied carbon approach.
+ Energy efficiency.
+ Water savings - may be a challenge with all-gender toileting approach.
+ Resiliency - preparing the building for immediate occupancy after a major seismic event.
+ Commissioning, aligned with PPS goals and with the Enhanced Commissioning

Benson Campus: Swing Sites

Accomplishments

- **Marshall:**
  - **Permits:**
    - Application process complete.
    - Finalized nonconforming upgrades (NCU) scope
  - **CTE Shop Building:** Size reduction and building system cost cutting to align with budget
  - **Tenant Improvement (TI):**
    - Phase I complete
    - Reduced TI scope to reduce cost & meet schedule constraints
- **Kenton:**
  - **Scope:** Re-roof scope removed due to positive condition assessment
  - **Schedule:**
    - Continue coordination with De La Salle HS to manage building transition
    - PPS IT backbone work to begin fall 2020

Next Steps

- **Marshall**
  - **TI work:** continuing during distance learning
  - **CTE building:**
    - Permitting
    - Construction procurement (design/bid/build)
- **Kenton:**
  - **Schedule:** Confirm design and permitting schedule
  - **Construction:**
    - Coordinate with PPS departments for specific scopes of work
    - Tree removal
    - Bus parking

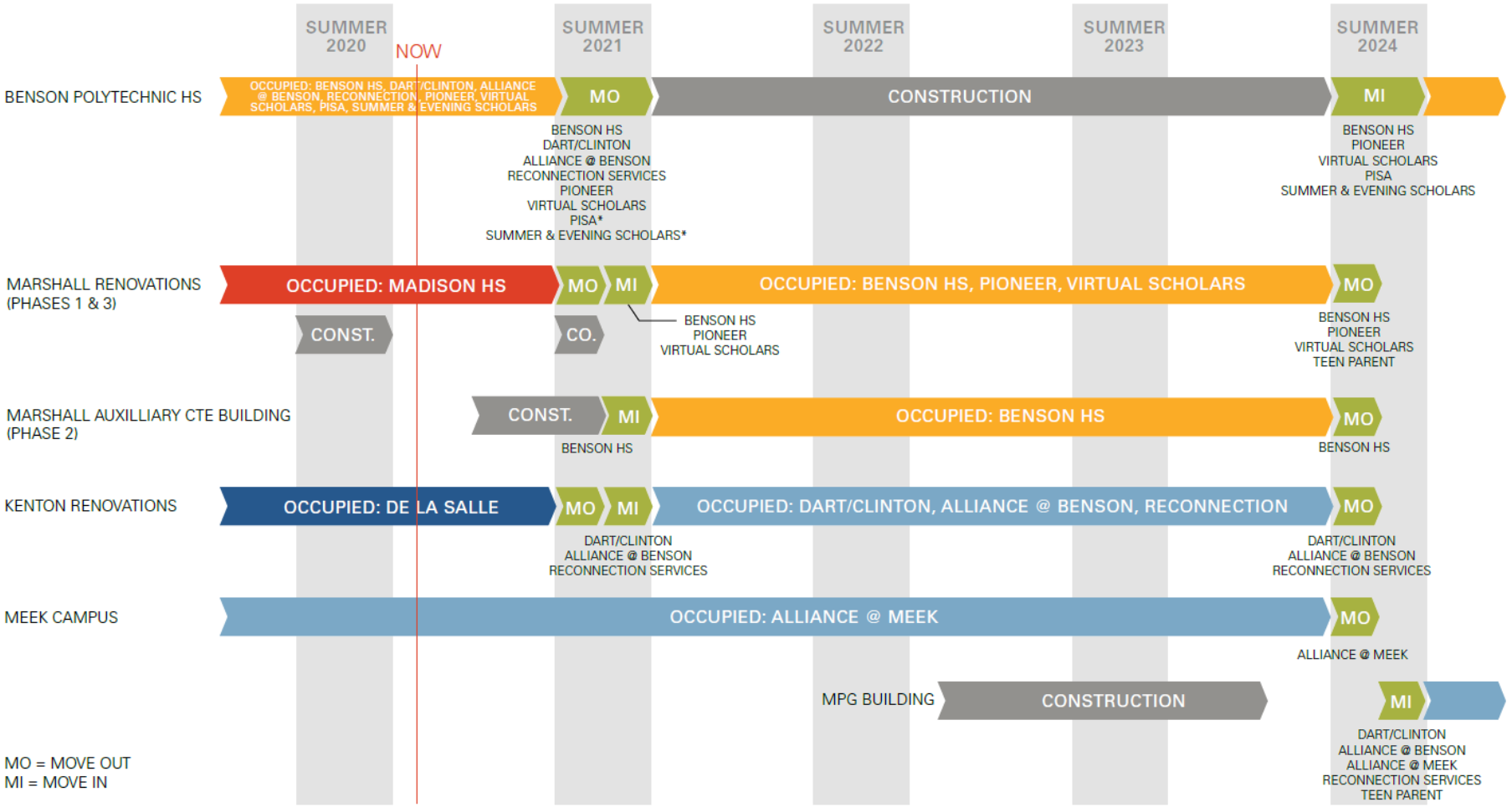
Better Than / Worse Than Planned

- **Better Than:**
  - NCU scope primary focus on covered bike parking
  - Marshall TI work went well
  - VE/cost cutting process for CTE Shop building
- **Worse Than:**
  - Marshall CTE shop building permitting timeline may cause delays & risks for move in
  - Tying mechanical equipment to Marshall roof structure to meet seismic requirements has caused issues

Benson HS Modernization

UPCOMING BENSON CAMPUS MOVES

BENSON SWING SITES PHASING PLAN



Benson: Swing Site @ Marshall

BENSON @ MARSHALL, CTE AUXILARY SHOP BUILDING : VE / COST CUTTING

MARSHALL SWING SITE VE UPDATE

ADDITIONAL VE BASED ON CMGC ESTIMATE AND TRADE PARTNER COORDINATION

+ Switch from "anti-climb" fencing to "hard to climb" fencing, delegate design
+ Delete ADA door operator
+ Cheaper overhead doors, manual operation, minimal glass
+ Change water heater from gas to electric
+ Eliminate duct heaters at furnaces (will reduce lifespan)
+ Reduce to one drywell
+ No painting at PEMB structure
+ 5psf loading at PEMB instead of 10 psf
+ Roofing - clip-rib standing seam in lieu of mechanical seam
+ Windows - single layer wall-lite instead of kalwall
+ No WRB layer at PEMB wall
+ No polished floor at restrooms, hard trowel only
+ Delete curtain at computer area in construction
+ Delete hand dryers, switch to paper towel dispensers
+ Use salvage lighting
+ Use salvage AV carts, projection screens, marker boards
+ Single floor drain outside of restrooms instead of FD in each restroom
+ Reduced card readers and cameras to two locations
+ Removal of air conditioning except for IT room, use of local fans in shops

BID ALTERNATES INCLUDED IN DOCUMENTS

+ Skylights
+ Wall between auto shops
+ Cooling in Freshman Auto Classroom

SCHOOL BUILDING IMPROVEMENT BOND

RHS Window Rehabilitation

Accomplishments

- **Construction:**
  - NTP issued mid May 2020.
  - Mock-up completed.
  - 100% of rehabilitated windows reinstalled and punch work completed at 178 windows.
  - Substantial Completion on August 24, 2020.

Next Steps

- **SHPO:**
  - RHS Modernization MOA was amended to extend timeline to the end of 2022 and added mitigation for Window Rehabilitation project.
  - Agreed-upon mitigation for Window Rehabilitation project will be PPS window rehabilitation manual that documents common conditions and rehabilitation techniques.
- **Construction:** Complete.

Better Than / Worse Than Planned

- **Better Than:**
  - Project completed 2 months early, minimizing impact to building users.
  - Reports from building users has been that the rehabilitated windows with replaced glass has reduced the heat gain from the exterior.
- **Worse Than:**
  - Numerous lessons learned on the technical nuances of rehabilitating historic windows. Many of these items will be captured in a PPS window rehabilitation manual.

Safety

- **Man Hours to Date: 1,901.25**
- **Reportable Accidents to Date:** 0
- **OSHA Recordable Accidents:** 0
- **Incident Rate:** 0%

SCHOOL BUILDING IMPROVEMENT BOND

RHS Phase IV

Accomplishments

- **Early TI Scope:** Concluding building permit final approval and closing out contract.
- **Design:**
  - City permit review comments addressed
  - Changed restroom from separated Boys/Girls restroom to an all users type restroom
- **Permits:**
  - Initial permit review comments received from the City and responses submitted.
- **Construction:**
  - RFP issued - received 12 proposals; proposal review & evaluation in process

Next Steps

- **Permits:**
  - Expecting permit by early November
- **Construction:**
  - RFP review and evaluation to be completed by end of the month
  - Board review and approval of construction contract by November 17th
  - Construction NTP after Board approval

Better Than / Worse Than Planned

- **Better Than:**
  - Received more proposals than anticipated for RFP
- **Worse Than:**
  - Title 11-related permit requirement of additional trees to be planted and requirement of an Occupied Safety Plan from the contractor

Safety

- **Man Hours to Date:** 0
- **Reportable Accidents to Date:** 0
- **OSHA Recordable Accidents:** 0
- **Incident Rate:** 0

Grant HS Modernization: Close Out

Close Out Activities

- **Warranty and Punch List:**
  - Area of site concrete to be replaced, due to ADA compliance issue.
  - All other warranty and punch list items are closed.
- **Contract Close-Out:**
  - Final GMP contract negotiations are complete
  - Final change orders are in review.
- **Construction Audit:** PPS construction auditor starting to finalize audit.
- **Budget:**
  - CM/GC contract is on budget.
  - Project budget continues to be reviewed to allow for funding Requested Projects if possible.

F/U Projects

- **Confirmed Projects:**
  - Gym Lighting: Contract awarded and new lights ordered; installation scheduled for end of October.
  - Interior Batting Cages: Complete.
- **Requested Projects:**
  - Improved ventilation for kiln room.
  - Improved cooling for computer room.
  - Band room instrument storage.
  - Added drainage at choir room balcony.
  - Additional CCTV cameras and move CCTV cameras.
  - Boiler exhaust extensions.

Better Than / Worse Than Planned

- **Better Than:**
  - Batting cage installation went well and works great.
- **Worse Than:**
  - Contactor has not yet finished site concrete rework for ADA.

Grant Upper Field Improvement

Accomplishments

- **Master Plan:** Approved February 2020.
- **Community Engagement:**
  - Project update livestreamed and stored on YouTube
  - Community members added to DAG to help address neighborhood concerns
  - DAG #8 held on October 8, 2020
- **Stakeholder Engagement:**
  - Successful partnership with Portland Parks and Recreation
- **Land Use:**
  - Early application meeting 10/13/20
- **Project Team:** Sunny Rose added to the Project as CM

Next Steps

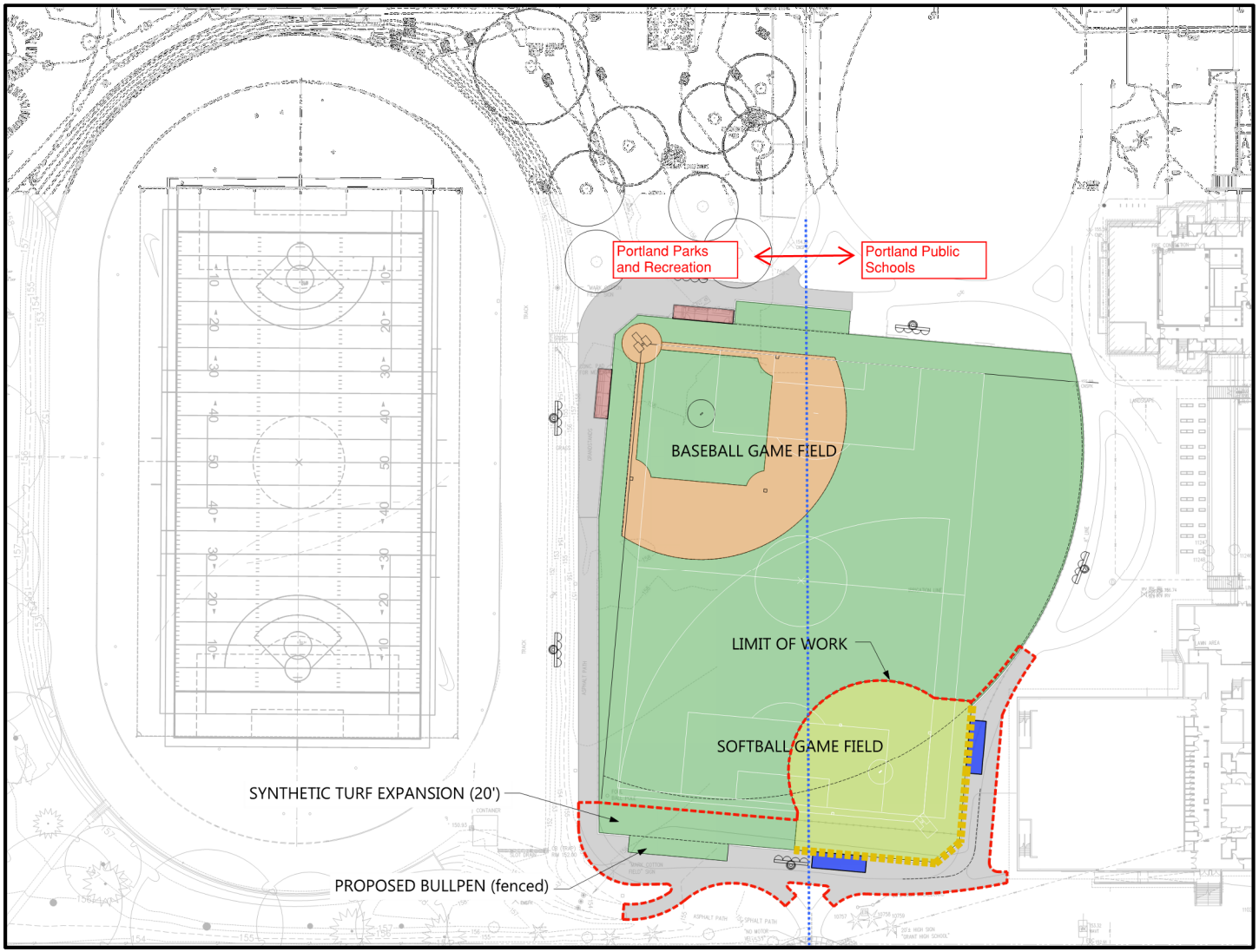
- **Design:**
  - SD/DD package completion mid October.
  - Review field netting scope/design.
- **Permits:**
  - Type III Land Use submission to be complete by October 31, 2020.
- **Construction:**
  - Develop ITB for General Contractor (project is design-bid-build)

Better Than / Worse Than Planned

- **Better Than:**
  - Neighborhood feedback from livestreamed presentation on September 30, 2020
  - DAG provided a lot of detail to design team in meeting on October 7, 2020
  - Scoreboards can be integrated with field lighting to minimize foundation work.
- **Worse Than:**
  - Potential costs for field netting were higher than expected, scope definition in progress. Costs not anticipated in Master Planning estimate.
  - Grade changes made evident by extending the field south creates challenges in bleacher area behind backstop.

Grant Upper Field Improvement

Schematic Design



H&S Program: Consolidated Projects

Overview To Date

Roofs:

- ❑ **Complete:**
  - King
  - Bev Cleary – Fernwood
  - Tubman
  - Holladay Center
  - Rose City Park
  - Rigler
  - Sitton
  - Chapman
  - Kelly
  - Mt. Tabor
  - Hayhurst
- ❑ **Ongoing (2020):**
  - Jackson
  - Harrison Park
  - Ockley Green
  - Woodlawn
- ❑ **Future:**
  - Duniway
  - MLC
  - Rieke

ADA:

- ❑ **Complete - Improvements:**
  - King
  - Beverly Cleary – Fernwood
  - Tubman
  - Lewis
  - Rose City Park
  - Rigler
  - Kelly
  - Mt. Tabor
  - Jackson
- ❑ **Complete - Elevators:**
  - King
  - Rose City Park
- ❑ **Ongoing - Elevators:**
  - Rigler
- ❑ **Ongoing - Ramps, restrooms, railings:**
  - Harrison Park
  - Ockley Green
  - Woodlawn

Fire Alarm/Fire Sprinklers:

- ❑ **Complete - Sprinklers:**
  - King
  - Bev Cleary – Fernwood
  - Lewis
  - Jefferson
  - Rigler
- ❑ **Complete - Fire Alarms:**
  - King
  - Rigler
  - Maplewood
  - Ainsworth Annex
  - West Sylvan
  - Green Thumb
  - Lee
  - Da Vinci
  - Bev Cleary – Fernwood
  - Forest Park
  - Astor
  - Kenton
  - MLC
  - Vernon
  - Atkinson
  - Grout
  - Harrison Park
- ❑ **Ongoing – Fire Alarms:**
  - Beaumont
  - Meek
  - Sabin
  - Laurelhurst
  - Robert Gray
  - Stephenson
  - Lent
  - Markham
  - Richmond

H&S Program: Roofs

Accomplishments

- ❑ **2020 Roofs** completed:
  - Chapman re-roof (4671)
  - Kelly (5319)
  - Mt Tabor (5320)
  - Hayhurst Seismic Retrofit Phase 2 (5028)
- ❑ **2020 Roofs** ongoing:
  - Harrison Park (5321) scheduled completion 10/27/20
  - Ockley Green (5322) scheduled completion 10/26/20
  - Woodlawn (5323) scheduled completion 10/27/20
- ❑ **2021 Roofs/Seismic:**
  - Currently negotiating contracts for A/E services for Dunniway, MLC, and Rieke Re-roofs, and Lent SRGP upgrades.

Next Steps

- ❑ **2020 Roofs**
  - Completed projects to be closed out and reconciled as soon as possible
  - Projects under construction to be completed as soon as possible (late October)
- ❑ **2021 Projects**
  - Start design for Dunniway, MLC, and Rieke re-roofs
  - Start design for Lent SRGP project

Better Than / Worse Than Planned

- ❑ **Better Than:**
  - Chapman Elementary welcomed thousands of Vaux Swifts back to the newly upgraded (and seismically strengthened) chimney. Working with the Audubon Society was a very collaborative experience.
  - Most roofing projects are complete with all but a few long lead items such as skylights and rooftop mechanical equipment.
- ❑ **Worse Than:**
  - There have been water intrusion events at the Ockley Green Roof project due to late season construction. OSM is addressing with outside cleaning contractors and the general contractor.

H&S Program: ADA

Accomplishments

- **Complete**
  - Door hardware and railings at Jackson (5030)
  - Restrooms, ramps, and entrance improvements:
    - Kelly (5319)
    - Mt Tabor (5320)

Next Steps

- **2020 Projects:**
  - Elevator at Rigler (5029)
    - Elevator will be complete by 11/2/20
  - Restrooms and hand railings:
    - Harrison Park (5321) complete by 11/2/20
    - Ockley Green (5322) complete by 11/2/20
    - Woodlawn (5323) complete by 11/2/20
- **Potential 2021 Projects:**
  - Assess remaining funding and potential needs at 2021 sites for ADA improvements

Better Than / Worse Than Planned

- **Better Than:**
  - Door hardware and ADA improvements at Jackson were installed without issue and are well received by school.
- **Worse Than:**
  - Wildfires delayed start of elevator cab and equipment install at Rigler by two weeks due to material shipping delays. Work is currently ongoing and will be complete by 11/2/20.

H&S Program: Fire Alarm/Fire Sprinkler

Accomplishments

- **Fire Alarm Group 1 North 5211**
  - Beaumont (see Next Steps)
  - Beverly Cleary Fernwood (complete)
  - Forest Park (complete)
  - Meek (see Next Steps)
  - Sabin (see Next Steps)
- **Fire Alarm Group 2 North 5212**
  - Astor (complete)
  - Kenton (complete)
  - Laurelhurst (see Next Steps)
  - MLC (complete)
  - Vernon (complete)
- **Fire Alarm Group 3 South 5213**
  - Atkinson (complete)
  - Grout (complete)
  - Robert Gray (see Next Steps)
  - Stephenson (see Next Steps)
- **Fire Alarm Group 4 South 5214**
  - Harrison Park (complete)
  - Lent (see Next Steps)
  - Markham (see Next Steps)
  - Richmond (see Next Steps)
- **Rigler Fire Sprinkler Install 5029 (complete)**

Next Steps

- Complete and closeout all open construction projects.
  - Beaumont (60% complete)
  - Meek (60%)
  - Sabin (60%)
  - Laurelhurst (60%)
  - Robert Gray (60%)
  - Stephenson (60%)
  - Lent (75%)
  - Markham (60%)
  - Richmond (40%)
- Reconcile all project costs and release any contingencies upon completion.

Better Than / Worse Than Planned

- **Better Than:**
  - Fire alarm installs are on track to meet city required deadline of all work complete by end of 2020.
- **Worse Than:**
  - Fire alarm install at Stephenson taking longer than anticipated due to additional coordination with FAM projects. Will still meet overall project schedule.

H&S Program: Asbestos

Accomplishments

- **2020 Asbestos Bond Projects:**
  - Beaumont (Phase-2) – complete
  - Chapman (Phase-2) – complete
  - Capitol Hill (Phase-2) – main work complete
  - Hosford – main work complete
  - Lane – complete
  - Rigler – main work complete
  - Stephenson – most work complete (FAM support for hall flooring). May continue with more asbestos flooring removal.
  - Vernon – complete
  - Woodstock – complete
  - Vestal – complete

Next Steps

- **2021 Asbestos Bond Projects Draft Planning:**
  - Robert Gray
  - Llewellyn
  - Skyline
  - East Sylvan
  - Winterhaven
  - King
  - Hosford
  - Vernon

Better Than / Worse Than Planned

- **Better Than:**
  - Rigler work was conducted with no rush to open and work was added due to the extension of remote learning. This resulted in quality work and satisfaction in the finished product by stakeholders.
  - Capital Hill floor preparation work was not necessary than anticipated and resulted in funds coming back into the project.
- **Worse Than:**
  - Woodstock floor removal resulted in the removal of more layers of subfloor than planned and increased the cost for replacement.
  - Hosford floor base was worse than anticipated and more preparation work was needed to receive new flooring.

H&S Program: Lead Paint

Accomplishments

- **Phase 2 and Phase 3** (Pre-K – 2nd Grade exterior and additional interior locations):
  - 14 interior and 16 exterior sites completed
- **Documentation:** PPS Health & Safety group undergoing training on Verdant Database Lead Paint Module.
- **Lead Paint IDIQ Solicitation:** Four contractors now under contract.

Next Steps

- **Phase 2 & 3 Work:**
  - Total of 54 sites have both Phase 2 & 3 work planned
- **Lead Paint IDIQ Solicitation:**
  - Job Order work packages in the works for bidding
- **Scope of work:**
  - With the continuation of Distance Learning, workers will have expanded access to work areas. Looking to expand scope of work in some locations to address multiple areas of deteriorated paint.

Better Than / Worse Than Planned

- **Better Than:**
  - In house OSM paint crew have streamlined exterior work and have been able to complete more sites than anticipated.
  - All OSM paint staff now trained for operating various lifts for access to additional work areas.
- **Worse Than:**
  - COVID related challenges remain. Two painters on crew cannot obtain clearance for respirators due to limited availability of respiratory evaluations.

H&S Program: Water Quality

Accomplishments

- **School by school detailed engineering plans**
  - Completed design on 45-school sites
  - Successful bids received on 35-school sites
  - Additional 20-school sites in the design process
- **Construction:**
  - Construction started July 2020 and continuing through Fall 2021, with 5 additional sites starting every 3 to 4 weeks
  - Construction is substantially complete for the first 5-sites.
  - Construction contracts in place for 4 additional groups (20-sites) awaiting fixture delivery.

Next Steps

- **Design Surveys:**
  - Detailed school site engineering surveys and Principal interviews for remaining groups continue. 50 sites have been completed, 47 remaining. All survey work to be completed by late spring 2021.
- **Design:**
  - Construction Drawings and bid packages of 5 sites to be released approximately every 3-weeks until all sites are addressed (Mid 2021)
- **Completion:**
  - All major construction and testing forecasted to be complete by the end of 2021

Better Than / Worse Than Planned

- **Better Than:**
  - The Water Quality Team prepared a budget for the Board to show financial viability of the Filter Water Program, based on the Pilot Program construction cost. After receiving bids for approximately one-third of the program, all packages are significantly under budget.
  - The Water Quality Team has conducted 50 Principal meetings and received very positive feedback about how this program is perceived by the school administration, teachers and the community.
- **Worse Than:**
  - The main drinking fixture for this program, the Elkay EZH2O® Vandal Resistant Bi-Level Bubbler and Bottle Filling Station, has seen a 300% increase in demand because of Covid-19. Due to this increase, the lead time for ordering the fixture has quadrupled from 3-weeks to 3-months. This has caused delays in installation.

H&S Program: Security Upgrades

Accomplishments

- **Security Upgrades Group 1:** 26 schools under Design/Build contract
  - 26 Schools *Turned Over / Punchlist**
- **Security Upgrades Group 2:** 31 schools under Design/Build contract
  - 31 Schools *Turned Over / Punchlist**
- **Security Upgrades Group 3:** 30 schools
  - 5 Schools *In Construction or Commissioning*
  - 25 Schools *Turned Over / Punchlist*

Next Steps

- **Security Upgrades Groups:**
  - Groups 1, 2: In Closeout, expected to be complete by 10/31/2020.
  - Group 3: Construction/commissioning is on track to complete by 10/31/2020.
- **Fencing / Other:**
  - *2 sites from Group 1 have fencing in design. Expected completion no later than 1/31/2021 but may be able to complete sooner.
  - *1 site from Group 2 has an entry door replacement in contracting. Expected completion by 12/31/2020.
- **Signage:**
  - Groups 1, 2, 3: Signage work is underway and expected to be complete by 12/31/2020.

Better Than / Worse Than Planned

- **Better Than:**
  - Group 3: Contractor performance and staffing, increased access to school buildings over the summer with lack of onsite student/community activities.
- **Worse Than:**
  - Group 1 and 2: Contractor performance and staffing, including design, submittal, construction, and closeout.

Narrative Comments:

Benson HS: VE process was successful for Marshal CTE building. Initial contractor cost estimating exercise for MPG Building master plan was concerning but design and construction teams are working to align schematic design to budget. Project team is awaiting 100% DD cost estimates for Benson HS. OSM continues to monitor the budget closely.

Color Key	
	Good
	Concerns
	Difficulty

Budget Perspective

Strategic Obj.	Perform
A	
B	
C	
D	
Average	

Active Projects

Strategic Objectives		Performance Measures	Performance Targets	Grant HS	Grant Upper Field	RHS Phase IV	Kellogg	Madison HS	Lincoln HS	Benson HS	Health & Safety					
Objective A Project Budget and Scope Aligned	1	Initial Project Budget and Scope Identified	Green > 10% Project Contingency Yellow 0% - 10% Project Contingency Red < 0% Project Contingency													
	2	Master Plan Budget and Scope Aligned														
Objective B Planning & Design Costs within Budget	3	Schematic Design Budget and Scope Aligned	Green > 10% Project Contingency Yellow 0% - 10% Project Contingency Red < 0% Project Contingency													
	4	Design Dev Budget and Scope Aligned														
	5	Construct Docs Budget and Scope Aligned														
Objective C Construction Costs within Budget	6	Project Budget and Scope Aligned at Construction Award / GMP	Green > 10% Project Contingency Yellow 0% - 10% Project Contingency Red < 0% Project Contingency													
	7	Project Budget and Scope Aligned at 50% Complete	Green > 5% Project Contingency Yellow 0% - 5% Project Contingency Red < 0% Project Contingency													
Objective D Project within Budget	8	Current Project Budget	Within Budgeted Amount													

Narrative Comments:

1. Overall OSM is tracking a cumulative 15.69%, down 0.29% since last quarter for consultants and contractors together. Current breakdown by certification type is as follows:

	Cumulative	Prior Report	Previous 12 Months	Prior Report
MBE:	5.56%	5.69%	6.64%	6.64%
WBE:	7.17%	7.28%	2.77%	2.77%
SDVBE:	<.01%	<.01%	<.01%	<.01%
ESB:	2.20%	2.22%	1.61%	1.61%
N-C:	0.77%	0.80%	0.05%	0.05%

N-C = Non-Certified (counted for credit from a Certified Business that "graduated" out or did not reapply). Business Equity data is based on invoices paid and typically is 2 months behind current jobsite conditions.

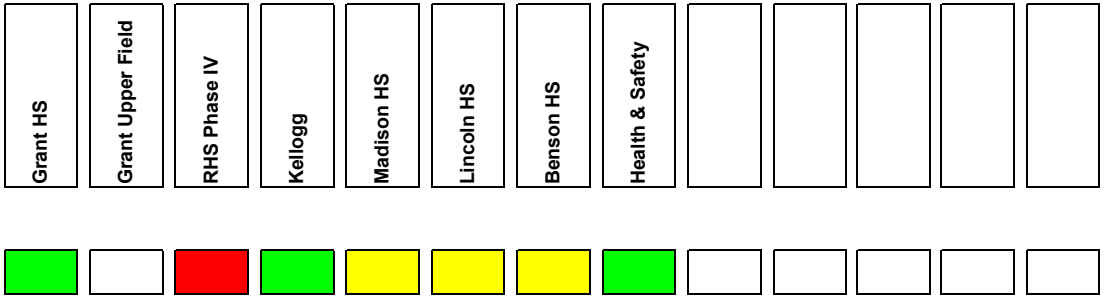
2. OSM continues to exceed the 20% apprenticeable trade hours goal (currently 24%, same as last quarter). Larger projects are seeing industry-wide challenges with laborer apprenticeship currently, but Lincoln apprenticeship has increased to 19%, and Madison apprenticeship has increased to 18%.

Color Key	
	Good
	Concerns
	Difficulty

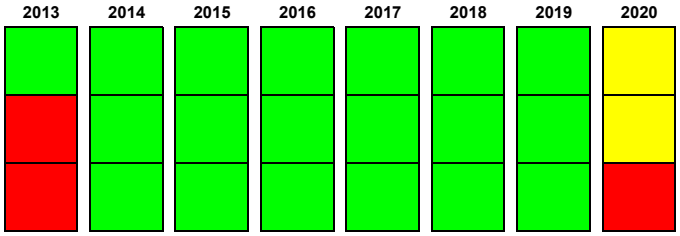
Equity Perspective

Strategic Obj.	Perform
A	
B	
C	
Average	

Active Projects



Strategic Objectives		Performance Measures	Performance Targets
Objective A Meets Aspirational Certified	1	Consultants - % of payments made to Certified owned	Green: Certified >18% Yellow: Certified >10% Red: Certified <10%
	2	Contractors - % of payments made to Certified owned	
	3	Project Overall - % of payments made to Certified owned	
Objective B apprenticable trade participation	4	Contractors % of labor hours/apprenticable trade	Green: participation >20% Yellow: participation >10% Red: participation <10%
Objective C Meets student participation	5	Tier 1 - Group Activities EG: career fairs, guest speakers	Green: students > 500 Yellow: students > 100 Red: students < 100
	6	Tier 2 - 1-on-1, Short-Term Activities EG: job shadows, mock interviews	Green: students > 50 Yellow: students > 20 Red: students < 20
	7	Tier 3 - 1-on-1, Long-Term Activities EG: internships	Green: students > 10 Yellow: students > 5 Red: students < 5



Narrative Comments:

Most projects are tracking well in all categories.

Business equity and workforce equity, based on current payments, remain yellow for Lincoln and Madison. Madison certified business participation will improve as construction continues but, based on current contract, will remain below 18% aspirational goal overall. Lincoln is currently forecasting 18% certified business participation on total contract, based on current and anticipated buyouts, but will not reach that on payments until Phase 2 is underway. Both teams continue to work on improving workforce equity numbers.

Roosevelt Phase IV started recently and only has current data for consultant payments, which are below the 18% aspirational goal for business equity. Some construction work occurred over the summer in the TI but payment data is lagging. The addition will be a separate construction contract, for the majority of the construction costs, and has not been contracted yet.

Benson budget continues to be monitored by OSM. While the project team has been able to remain on budget at each successive design phase, that has been achieved through significant VE efforts.

Color Key	
	Good
	Concerns
	Difficulty

Overall Perspective

Perspective	Perform
Budget	
Schedule	
Stakeholders	
Equity	
Average	

Active Projects

	Grant HS	Grant Upper Field	RHS Phase IV	Kellogg	Madison HS	Lincoln HS	Benson HS	Health & Safety					
Overall Project Performance													
Perspective: Current / Final Budget													
Perspective: Current / Final Schedule													
Perspective: Cumulative Equity													

Narrative Comments:

1. Madison HS: Permit review delays, COVID, and air quality days have used all float. Project team is utilizing overtime to regain schedule. Official schedule as of 10/1 shows 4 days behind SC target. As of 10/8, project is 2 days behind SC target and anticipates being back on schedule by end of month. Project team is reviewing use of overtime to develop additional cushion for possible weather delays.

Color Key	
	Good
	Concerns
	Difficulty

Schedule Perspective

Strategic Obj.	Perform
A	
B	
C	
D	
E	
Average	

Active Projects

Strategic Objectives		Performance Measures	Performance Targets	Grant HS	Grant Upper Field	RHS Phase IV	Kellogg	Madison HS	Lincoln HS	Benson HS	Health & Safety					
Objective A Establish Schedule Target &	1	Baseline Schedule Established	Green = completed													
Objective B Planning, Permitting & Design Phases on Schedule (measured from baseline schedule)	2	Design Contract Award	Green = < 0 weeks impact Yellow = 0 - 4 weeks Red > 4 weeks													
	3	Schematic Design Completed														
	4	Design Development Completed														
	5	Construction Contract Documents														
	6	Land Use Permit Approved														
	7	Building Permit Approved														
Objective C Construction on Schedule (measured from baseline sched)	8	Construction Started	Green = < 0 weeks impact Yellow = 0 - 4 weeks Red > 4 weeks													
	9	Substantial Completion														
	10	Final Completion														
Objective D Meet Occupancy Schedule Target	11	Occupancy On Schedule	On target for school opening													
Objective E Meet Turnover Schedule Target	12	Turnover On Schedule	Green = < 10 mo after open Yellow = 10-12 mo after open Red = > 12 mo after open													

ANDERSEN CONSTRUCTION

MWESB Strategy Review

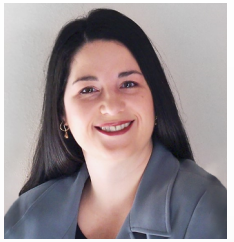
October 15th, 2020

ANDERSEN TEAM

ERIN STORLIE
Preconstruction Manager

CANAAN CHATMAN
Community Outreach

ELIZABETH JUHALA
Diversity Outreach



KIMBERLY GAMBLE
DEI Director

Erin

- Right Size Packages for interested firms
- Develop timing of bid packages with Design Team

Canaan:

- MWESB Relationships with Community
- Pulse on Market Conditions

Elizabeth

- Bidder Outreach during bid period
- Point person at Monthly Industry Events
- Assists with Prequalification Process & Bidding Software

Kimberly

- Oversees Diversity, Equity & Inclusion for Andersen Internal & External practices

BENSON

Is the Aspirational Goal of 18% Realistic for Benson?

YES

We need to use new strategies to support this effort

BENSON

WHAT STRATEGIES ARE NEEDED TO ACHIEVE THE 18% ASPIRATION GOAL

Three Types of Strategies are proposed for Benson:

1. **Public Bidding** / Self Performed Work –
   Open to all Bidders Certified / Non-Certified
   Self Performed work proposed by Andersen

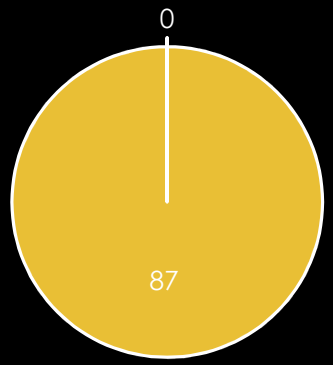
2. **MWESB Set Aside Packages** –
   Bid ONLY to MWESB Certified Firms

3. **Direct Contracting** with Certified Firms –
   Select Appropriate & Interested Subcontractors
   Utilize 3rd Party for Cost Verification

TRADITIONAL METHOD

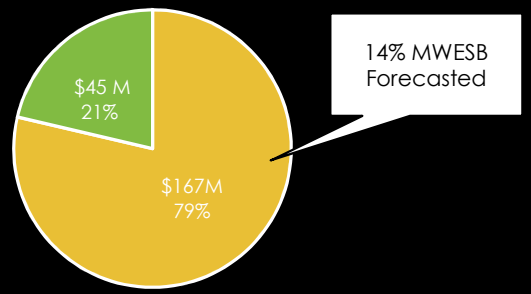
- Uses Low Quote, Best Value approaches, considered High Competition for Subcontractors
- Using this method, project is trending towards 14% MWESB Participation of the overall contract value
- Largest issue: MWESB Capacity in our Community

Number of Bid Packages



Direct Contract w/ MWESB Partner
Set Aside - MWESB Bidding Only
Open Bidding/RFP
Other Costs (Contingency/Fee, Etc.)

Project Value (in Millions)

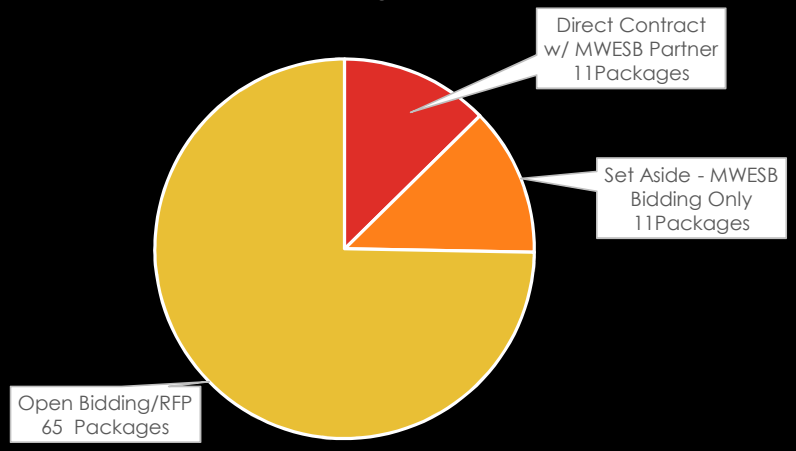


Direct Contract w/ MWESB Partner
Set Aside - MWESB Bidding Only
Open Bidding/RFP
Other Costs (Contingency/Fee, Etc.)

PROPOSED PLAN

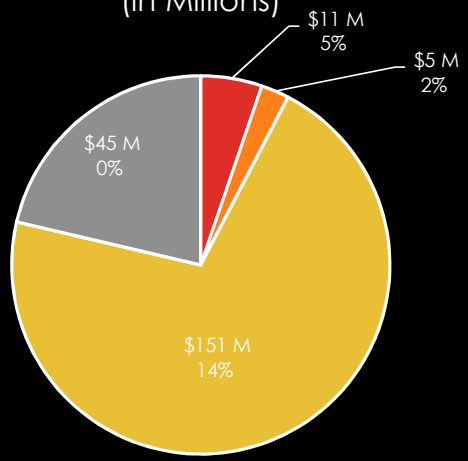
- Utilize all three contracting methods
- 25% of our Bid Package **Quantity** provides opportunities for Certified firms
- $16 M of our $212M Project utilizes **Set Aside and Direct Contracting** Methods
- Market Conditions/Capacity & Relationship Building are key to this approach

Number of Bid Packages-Opportunities



Direct Contract w/ MWESB Partner
Set Aside - MWESB Bidding Only
Open Bidding/RFP

Project Value (in Millions)

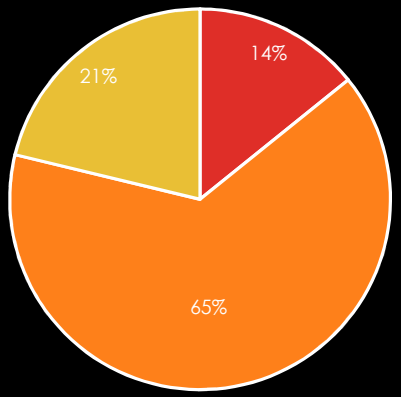


Direct Contract w/ MWESB Partner
Set Aside - MWESB Bidding Only
Open Bidding/RFP
Other Costs (Contingency/Fee, Etc.)

COMPARISON

Additional 8% of participation available using Set Aside/Direct Contracting

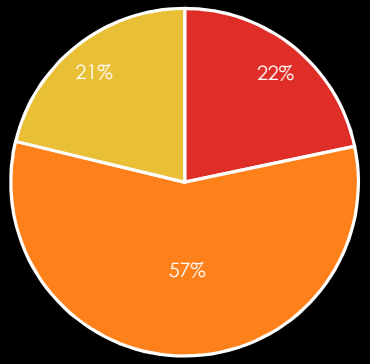
Using Traditional Public Bid/RFP Process
Trend 14%



MWESB Certified Non Certified Other Costs (Contingency, Fee, etc.)

Trending below 18% Aspirational Goal (-4%)

Using Set Aside / Direct Contracting Methods
Trend 22%



MWESB Certified Non Certified Other Costs (Contingency, Fee, etc.)

Trending above 18% Aspirational Goal (+4%)

Benson High School Program

Contracting Plan

Benson Modernization
Benson High School Campus

October 20th, 2020

Table of Contents

1. Overview – Project goals
2. Economic Participation
3. Approach—Procurement Strategies
4. Project Contacts
5. Appendices:

Appendix A – Benson Modernization Summary of Bid Packages & Certified Participation

Appendix B – Outreach Calendar-Sample (Trade Package 4)

Appendix C – Example of RFP Scoring (MEP RFP)

1. Overview – Project Goals

Andersen Construction (AC) outlines within this contracting plan how it intends to achieve the stated project goals of maximizing Certified sub-contractor participation and workforce through a deliberate, strategic and creative bid solicitation and award process on the Benson High School Modernization project.

Andersen/PPS Contract Requirements:

- Target business participation:
  - As pursuant to Portland Public Schools (PPS) Policy, 8.50.095-P aspirational Certified Business participation goal – 18%
- Apprenticeship Programs:
  - As pursuant to section 12, part 2 of the district's CM/GC contract, 20% of labor hours in each apprenticeable trade shall be performed by state registered apprentices, for contracts in the amount of $100,000 or more.
- Maximize employment opportunities for women and minorities.
- Bring the highest value possible to the Owner for each contracting opportunity.
- Engage the local community through the bidding process.
- Encourage larger subcontractors to offer opportunities to smaller subcontractors to grow their business and provide opportunities to participate on projects that are currently too large for their business to effectively manage as a stand-alone subcontractor.
- *Utilize set aside bid packages to MWESB Firms, Reference PPS 49-0690(5)(k) (Subcontractor selection in a CMGC contract)*
- *Utilize sole source/direct contracting to Certified Firms*
- *Calculate Participation based on Prime Contract requirements, with the understanding that the length of this project spans over 5 years, we will calculate percentages based on status at the time of subcontract signature.*

To Accomplish these project goals, AC will closely follow the approach laid out in this contracting plan. The entire project team will work in collaboration, employing strategies and pragmatic solutions to ensure the Benson High School Modernization creates opportunities, builds community and strives to meet the goals set forth in this plan.

2. Economic Participation

Aside from the percentage CERTIFIED participation goal on this project, Andersen Construction believes the most important goal is to help grow the **long-term capacity** of these businesses using best business practices. Achieving an aspirational percentage goal does nothing for the community if the firms working on the projects don't have sustained growth after the completion of the project.

Our hope is that with the support of the National Association of Minority Contractors Oregon (NAMC), Professional Business Development Group (PBDG), Oregon Association of Minority Entrepreneurs (OAME), and Joint Apprenticeship Training Committee (JATC), Andersen will successfully engage the Certified community and give them meaningful opportunities on this project and many others in the future.

General Outreach

We believe that the most important outreach is building relationships. In every project we encounter, our goal is to foster old, and build new relationships with Target businesses. Andersen Construction will continuously update our comprehensive list of Target Business bidders and increase Career Learning and Contractor Workforce Equity utilizing the following means of contact:

- Andersen Construction Certified list (emails are generated for each Trade Package), Includes discussion regarding partnerships at Prebid walk-throughs to identify potential partners between Certified & Non-Certified firms.
- National Association of Minority Contractors (NAMC)
- Oregon Association of Minority Entrepreneurs (OAME)
- Professional Business Development Group (PBDG)
- Latino Built

In Addition, we will:

- Provide a Calendar of Bidding Events and Outreach Opportunities (See Appendix B—Outreach Calendar). Host and/or attend outreach events that will focus on our Contracting and Economic Participation plans. Events may be held Virtually, at the Andersen Office, NAMC, Metro, PCC's Workforce center, or a PBDG, or OAME(Refer to Appendix B—Outreach Calendar)
    - Meetings will cover project scope, bid and project schedule, workforce training requirements, and preliminary technical assistance.
    - All meetings will include key members of the project team.
    - Project staff will follow up with all meeting attendees to continue to foster relationships.
    - The Benson High School project will also be highlighted at NAMC's, OAME's, PBDG monthly membership meetings and outreach mailers to gain interest and share contracting opportunities.
    - Flyers to circulate to various industry groups and email directly to subcontractors will be prepare for each trade package.
- Advertise subcontracting work and potential Target Business opportunities in local minority newspapers such as: The Skanner, El Latino de Hoy, Asian Reporter and Portland Observer.

- Foster Non-Certified and Certified business introductions prior to bidding period to promote positive subcontracting partnerships. This can be Accomplished at pre-bid meetings and through the efforts of NAMC and PBDG and the Andersen Construction preconstruction team.
- Contact Target Businesses that perform the appropriate type of work by contacting companies with personal meetings (virtual and in person), phone, and email informing them of the pre-bid meetings and all bidding opportunities.
- Provide workshops to assist with take-off, scope understanding, and bid submissions using Building Connected.

Youth Participation Opportunities

We must find ways to encourage minority and women students to get interested in the construction industry. There is a wide array of fields and levels of employment available in the construction trades, and not enough awareness amongst this demographic.

- Prime Agreement Requirement—Career Learning Equity—of the PPS CM/GC contract, contractors whose contract is between $100,000 and $1,000,000 will be required to register with Oregon Connections and offer at least two career learning opportunities. Those subcontractors whose contracts are greater than $1,000,000 will be required to offer at least four learning opportunities for PPS students.
- In addition to providing at least four career opportunities, subcontractors whose contracts are over one million dollars will also be required to register for the NW Youth Careers Expo. The NW Youth Careers Expo is another opportunity to expose high school students to the broad and diverse world of construction.
- Integrate the Benson High School Students in meaningful work that will be part of the Benson Project, potential ideas:
    - Artwork/Sculpture for exterior courtyard areas (in collaboration with Design Team)
    - Window into construction dates/times that students can listen in on meetings/work sessions to see how the design team/contracting team interact
    - Summer internship opportunities for select students.
    - Create construction site visit opportunities for students, in which lessons on building, math, and career coaching are primary topics. Investigate various opportunities in which students can be involved in all aspects of the construction process.
    - In classroom teaching opportunities

- Coordinate with ACE (Architecture, Construction, Engineering) Mentorship program to expose high school students to careers in construction.
- Work with Construction Apprenticeship & Workforce Solutions (CAWS) and its affiliate programs to enhance exposure to careers in construction. Affiliate apprenticeship programs include:
    - Evening Trades Apprenticeship Preparation (ETAP)
    - Constructing Hope Pre-Apprenticeship Program (ICCDC)
    - Oregon Tradeswomen, Inc.
    - Portland Youth Builders
    - Urban League of Portland
    - NW Carpenters Union Apprenticeship program for youth

3. Approach: Bidding Strategies

AC will utilize the following procurement methods for subcontractor bidding and award:

- A-Public Bidding
    A.1 - Public Bidding, Low Bid
    A.2 - Set Aside Bidding, Publicly Advertised (COBID Only Firms)
- B-Request for Proposal (RFP)-Public RFP, Best Value
- C-Sole Source/ Direct Contract (Andersen Self Perform and COBID Only Firms)
- D-Low Quote (less than $100,000)

Refer to Appendix A – Summary of Bid Packages & Certified Participation for a summary of procurement method by bid package, provided for Benson Campus (Marshall, MPG will be developed along with estimates)

The construction schedule for Benson includes the following general timeline:

- 2019-2020, Major trade partner selection process
- 2021-2022 Demolition, structural, rough in
- 2022-2024 Renovate existing and build new structures

Since many trade partners will selected years in advance of work, it would be impossible to require them to maintain their Certified status, while encouraging growth of their firms. Andersen's Certified status analysis will include participation by all firms at the time of preconstruction and/or subcontract signature.

A. Public Bidding – Low Bid

- **A.1 Traditional Low bid**, utilizing public bid process. All bidders must meet prequalification requirements, and include full scope of work detailed in bid package.
- **A.2 Set Aside Bidding for Certified trade contractors only**. This strategy would be the same as A.1, but only solicited to CERTIFIED Firms as defined by the Prime Agreement.*

		Valuation				
BidPackage	Description	Total Package Value	MWESB Participation	Value of MWESB Participation Targeted	Remaining Value of Package (NON MWESB)	Trade Package Number
01-15	Final Clean -Set Aside	293,494	100%	$ 293,494	0	TP 5-50% CD
05-54	Misc. Metals - New Buildings - Set Aside Package	413,892	100%	$ 413,892	0	TP 5-50% CD
05-56	Misc. Metals - Site - Set Aside Package	466,700	100%	$ 466,700	0	TP 5-50% CD
05-70	Railings Exterior (Building) - Set Aside Package	354,123	100%	$ 354,123	0	TP 5-50% CD
09-40.1	Acoustic Ceilings -Lay in Only (includes all buildings except D&I)	850,000	100%	$ 850,000	0	TP 4-100% DD
09-90	Painting & Coatings - Set Aside - Main Bldg	2,255,335	100%	$ 2,255,335	0	TP 5-50% CD
10-15	Signage - Set Aside	-3,395	100%	$ (3,395)	0	TP 5-50% CD
10-60	Storage Assemblies - Furnish & Install	-822	100%	$ (822)	0	TP 5-50% CD
31-00.1	Earthwork - Set Aside for ROW	113,758	100%	$ 113,758	0	TP 4.5-100% DD+Prog Print Oct 2020
32-80	Landscaping & Irrigation - Set Aside	375,850	100%	$ 375,850	0	TP 5-50% CD
32-85	Pavers - Group with Landscaping	43,712	100%	$ 43,712	0	TP 5-50% CD

B. Request for Proposal (RFP)

- **B.1 Public RFP -** It is critical to begin the process of securing certain trades not only for schedule but for design assistance, we plan to award to Mechanical, Electrical, Plumbing, and Fire Protection trades using a Request for Proposal (RFP) process that evaluates both price and qualifications of the subcontractors in a competitive environment, as allowed in PPS / CM/GC contract, paragraph 14.c.1. The RFP process will follow the scoring system as described in Appendix C—MEPF RFP Document and will also include one-on-one interviews to further vet the scope of work and qualifications. Prior to bid period Andersen Construction, with support of NAMC and other supporting organizations, will identify qualified MEPF Target businesses and Non-Certified businesses that are open to mutually beneficial partnering opportunities. We will make business introductions and help to facilitate partnering structures. Points will be given for:
  1. Approach
  2. Budget
  3. Team
  4. Certified Participation

  (Points scoring may vary by package, and will be reviewed with the PPS team for evaluation for competition).

*In order to achieve the project target subcontractor participation goals, a portion of the subcontracted work will be procured through a competitive bid process that specifically includes only state Certified firms for select trades. This approach allows for the project team to significantly increase the chances of subcontracting with a state Certified firm while still fostering a competitive bid environment to meet the PPS/CM/GC contract requirements. Scopes will be tailored to match the capabilities of targeted firms.

In some cases this may result in fewer than 3 bids- Andersen is working to include as many Certified firms as possible and adhere to a minimum of three bids. In the event of fewer than three bids (one or two) ONLY received, Andersen will recommend to award to the only bidder that responded to the bid advertisement.

MWESB Certification will be recognized at the time of the subcontract issuance, not the time of work installed on the project.

C. Sole Source / Non-Competitive

ASI / Andersen Construction Self Perform/Sole Source Trade Packages:
AC plans to use Section 14.e.3 “CM/GC Self-Performance or Performance by CM/GC Affiliates or Subsidiaries Without Competition” procurement strategy for the significant portions of the project outlined below.

- **General Conditions**
  Andersen Construction provides this work as part of the Prime Agreement, and assumes this is not required as a self perform package.
- **General Requirements**
  Andersen Construction proposes negotiating hourly labor rates to self perform general requirements. This strategy has been successful on GHS, and allows for flexibility, as many items are not “biddable” with a base scope of work, and require immediate action, and crew availability to keep a safe, clean, organized jobsite.
- **Survey, Layout, BIM Scanning**
  Andersen Construction proposes negotiating hourly labor rates to self perform work required to coordinate multiple trades, and provide continuity with Preconstruction activities that generated initial data. This strategy has been successful during preconstruction, and at GHS, and allows for flexibility, as many items are not “biddable” with a base scope of work, and require immediate scheduling when areas are discovered during demolition that need confirmation of as-built field conditions.
- **Foremen Oversite**
  Foremen included in Cost of Work line items to supervise and coordinate subcontractor work.
- **Shoring (labor)**
  This work requires careful collaboration with the structural design team, and directly impacts the Concrete and Demolition Scope. Additionally, flexibility and revisions are often required due to unforeseen conditions that are revealed during construction. Engineered solutions/revisions using our (proposed) Structural Engineer: Rick Amodeo is a workflow that we are accustomed to managing and implementing on complex projects, like Benson. Amodeo Engineering is COBID Certified.
- **Concrete & Rough Carpentry/CLT—Structural (no site walls/exterior flatwork)**
  ASI Concrete being awarded the concrete work is a primary contributing factor to maintaining schedule.

  Include framing and other rough carpentry scopes of work that require careful coordination with existing building, layout, design team coordination with Architect and Structural Engineer. Streamline process

for coordination to core team players to make an effective team able to move quickly through various field issues as they arise.

- Renovation of Existing Casework/Millwork.

For more detail, please refer to letters provided under separate cover requesting this contracting method for these scopes, as required by section 14.e.3 “CM/GC Self-Performance or Performance by CM/GC Affiliates or Subsidiaries Without Competition” in the PPS / CM/GC contract.

Andersen Construction direct award to subcontractor

In order to meet PPS Aspirational Goals for Participation of Certified Business, which is a specified Contract Requirement included in the Prime Agreement (14. Subcontracts and Other Contracts. Subcontractor Selection, 4.i), Andersen is proposing to allow for direct contracting using the sole source method for several work packages. These packages are identified in Appendix A as Direct Contract (with proposed contractor name included). The overall value of these packages would ensure success to contract approximately $11M of work. Advantages to using the sole source approach include the following:

- Provide mentorship for smaller firms in the preconstruction and estimating process to allow for scope and budget development.
- Provide backlog of work for firm that typically hard bid.
- Provide support and commitment to growing firms
- Provide preconstruction stipend to support efforts to review documents for constructability

Andersen also proposes to utilize this Contracting Plan as the written justification letter required in the Prime Agreement for PPS’s approval, no further documentation/justification will be required for final review. Direct Contract packages are provided in Appendix A, and on the following pages for reference.

		Valuation				
BidPackage	Description	Total Package Value	MWESB Participation	Value of MWESB Participation Targeted	Remaining Value of Package (NON MWESB)	Trade Package Number
06-10.GC1	Bldg D & I: Wood Framing/Rough Carpentry , Millwork - F&I, Casework, Gyp Bd, Framing, Ceilings, Lay in Clgs, Carpet/Resilient, Painting, Coatings	847,761	100%	$ 847,761	0	TP 4-100% DD
07-60	Flashing & Sheet Metal, Incl. Metal Panels	1,744,764	100%	$ 1,744,764	0	TP 4-100% DD
08-10	Doors, Frames, & Hardware (Inc. Exterior)	2,292,131	100%	$ 2,292,131	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD
08-53	Window Prep/Protection, Public Right of Way Horiz. Site Concrete, Site Furnishings	1,058,551	100%	$ 1,058,551	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD
08-60	Skylights	375,000	100%	$ 375,000	0	TP 4-100% DD
09-23	Plaster	1,000,000	100%	$ 1,000,000	0	TP 4-100% DD
10-25.GC2	Reinforced Polyurethane Wall Finish, Misc Specialties, Visual Display Surfaces, Toilet/Bath Specialties, Corner Guards	740,059	100%	$ 740,059	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD
09-30	Tiling	400,000	100%	$ 400,000	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD
09-40.2	Stretch Wall (Currently only includes SFWS-1, SAW-2, SAW-3)	560,000	100%	$ 560,000	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD
09-67	Fluid-Applied Flooring (Semco)	124,659	100%	$ 124,659	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD
12-20	Window Coverings	595,096	100%	$ 595,096	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD
32-15	Horizontal Site Concrete	1,404,518	50%	$ 702,259	702,259	TP 5-50% CD

Additional Breakdown for the GC Packages is provided for reference here:

Sole Source Mini GC Package 1: (Buildings D&I)

BidPackage	Description	Package Captain	Special Package?	Total Package Value
06-10.GC1	Wood Framing/Rough Carpentry	Sanada/Holstrom	Sole Source - GC Pkg 1 (Bldg D & I)	275,491
06-20.GC1	Millwork - Furnish & Install	Sanada/Storlie	Sole Source - GC Pkg 1 (Bldg D & I)	23,884
06-40.GC1	Casework - Set Aside	Sanada/Storlie	Sole Source - GC Pkg 1 (Bldg D & I)	15,505
09-20.GC1	Gyp Board, Framing, & Ceilings	Sanada/Storlie	Sole Source - GC Pkg 1 (Bldg D & I)	365,796
09-40.GC1	Lay In Acoustic Ceiling & Wall Panels	Sanada/Storlie	Sole Source - GC Pkg 1 (Bldg D & I)	39,585
09-65.GC1	Carpet & Resilient	Sanada/Storlie	Sole Source - GC Pkg 1 (Bldg D & I)	14,190
09-90.GC1	Painting & Coatings - Set Aside-Area D & I	Sanada/Storlie	Sole Source - GC Pkg 1 (Bldg D & I)	113,310

Sole Source Mini GC Package 2: Interior Specialties

BidPackage	Description	Package Captain	Special Package?	Total Package Value
09-25	Reinforced Polyurethane Wall Finish	Storlie	Sole Source - GC Pkg 2 (Specialities)-AZ Commercial	22,068
10-00.GC2	Misc. Specialties	Storlie	Sole Source - GC Pkg 2 (Specialities)-AZ Commercial	1,500
10-10	Visual Display Surfaces	TBD-TP 5	Sole Source - GC Pkg 2 (Specialities)-AZ Commercial	184,497
10-25.GC2	Toilet, Bath & Laundry Specialties	Storlie	Sole Source - GC Pkg 2 (Specialities)-AZ Commercial	473,295
10-26.GC.2	Corner Guards	Storlie	Sole Source - GC Pkg 2 (Specialities)-AZ Commercial	58,699

Sole Source Mini GC Package 3: Exterior Site Concrete at Right of Way, Site Accessories, Window Prep/Protection

BidPackage	Description	Package Captain	Special Package?	Total Package Value
08-53	Window Prep/Protection	Storlie	Sole Source - GC Pkg 3 Window Prep/Site Concrete/Furnishings-Advanced Tribal	760,817
32-15.1	Horizontal Site Concrete ROW Only	TBD-TP 5	Sole Source - GC Pkg 3 Window Prep/Site Concrete/Furnishings-Advanced Tribal	158,834
33-20.GC2	Site Furnishings	Storlie	Sole Source - GC Pkg 3 Window Prep/Site Concrete/Furnishings-Advanced Tribal	138,900

The Prime Agreement language is provided here for your reference:

4) When the subcontractor selection process for a particular Work package will not be "competitive" as provided for in this section, the process must meet the following requirements:

   i. The CM/GC must prepare and submit a written justification to the District, explaining the project circumstances that support a non-competitive subcontractor selection process for a particular Work package, including, but not limited to, Emergency circumstances, the CM/GC's need to utilize a key subcontractor member of the CM/GC's project team consistent with the CM/GC's project proposal, the need to meet other specified Contract requirements, the continuation or expansion of an existing subcontractor agreement that was awarded through a "competitive process" along with facts supporting the continuation or expansion of the subcontractor agreement, or a "sole source" justification;

   ii. For a "sole source" selection of a subcontractor to proceed, the District must evaluate the written justification provided by the CM/GC and must find that critical project efficiencies require utilization of labor, services or materials from one subcontractor; that technical compatibility issues on the project require labor, services or materials from one subcontractor; that particular labor, services or materials are needed as part of an experimental or pilot project or as part of an experimental or pilot aspect of the project; or that other project circumstances exist to support the conclusion that the labor, services or materials are available from only one subcontractor;

   iii. The CM/GC must provide an independent cost estimate for the Work package that will be subject to the non-competitive process, if required by the District;

   iv. The CM/GC must fully respond to any questions or comments submitted to the CM/GC by the District; and

   v. The District must approve the CM/GC's use of the non-competitive subcontractor selection process prior to the CM/GC's pursuit of the non-competitive process.

Andersen will work with PPS to develop a 3rd party estimate review during the estimating process. Andersen reserves the right to terminate an agreement if preconstruction efforts are not met.

D. Low Quote (Less than $100,000)

AC plans to use the low quote method of procurement as listed in Section 14.c.1 of the PPS / CM/GC contract for scopes under $100,000, including but not limited to the following: (See attached Appendix A: Summary of Bid Packages & Certified Participation)

Program Approximate Participation Levels are Estimated in the table below

(Refer to Appendix A – Benson Modernization Program Summary of Bid Packages & Certified Participation for further breakdown)

Benson Program MWESB Participation Summary Forecast

Location	Estimate Target Value	Current Forecasted Value*	Forecasted Participation Percentage*	18% Aspirational Goal Calculation	Difference	Comments
Benson High School	$ 212,469,350	$ 45,676,069	21%	$ 38,244,483	$ 7,431,586	Budget updated 8/24/20 based on VE goals, Forecasted Certified participation is calculated based on known estimate updates/budgets as of 10/20/20.
MPG Building	$ 46,235,800	$ 8,322,444	18%	$ 8,322,444	$ -	Forecast based on Meeting Minimum Goals, needs detail
Marshall Tenant Improvements	$ 4,000,000	$ 581,752	15%	$ 720,000	$ (138,248)	Updated 8/24/20
Marshall CTE Building	$ -	$ -		$ -	$ -	Deleted from scope
Total	**$ 262,705,150**	**$ 54,580,265**	**21%**	**$ 47,286,927**	**$ 7,293,338**	

See individual location detailed Bid Package Breakdowns for additional information

4. Project Contacts

Brad Nile- Project Executive 503-283-6712 bnile@andersen-const.com

Eric Sprague – Sr. Project Manager-503-283-6172 esprague@andersen-const.com

Mike Sanada – Project Manager-503-283-6172 msanada@andersen-const.com

Erin Storlie – Preconstruction Manager – 503-572-2414 estorlie@andersen-const.com

Emily Hager – Estimator – 503-358-9262 ehager@andersen-const.com

Canaan Chatman –Business Relationships Manager – 971-413-0094 cchatman@andersen-const.com

Elizabeth Juhala - Outreach Coordinator-503-283-6172 ejuhala@andersen-const.com

Appendix A – Summary of Bid Packages & Certified Participation

Appendix B – Outreach Calendar

Appendix C – MEPF RFP Document (Sample of RFP Template)

			Valuation					Subcontract Selection Method							
BidPackage	Description	Contracting Method	Total Package Value	MWESB Participation- Based on Cost of Work ONLY	Value of MWESB Participation Targeted	Remaining Value of Package (NON MWESB)	Trade Package Number	A.1 - Public Bidding (Low Bid)	A.2 - Set Aside Public Bidding (COBID Firms Only Bid these Packages)	B Price/Qualifications (RFP)	C. Sole Source/Non-Competitive Strategic Partnership	D. Low Quote <$100,000	Total By Contracting	Variance Package Value vs. Contracting
00-00	General Requirements	Sole Source - Self Perform	8,721,321	10%	$ 872,132	7,849,189	TP 4-100% DD				8,721,321		$ 8,721,321	$ -
00-01	Cost of Work Support Services	Sole Source - Self Perform	1,080,824	0%	$ -	1,080,824	TP 4-100% DD				1,080,824		$ 1,080,824	$ -
00-01.1	Foremen	Sole Source - Self Perform	2,734,486	0%	$ -	2,734,486	TP 4-100% DD				2,734,486		$ 2,734,486	$ -
00-02	Hoisting	Sole Source - Self Perform	147,019	0%	$ -	147,019	TP 4-100% DD				147,019		$ 147,019	$ -
01-15	Final Clean -Set Aside	Set Aside-MWESB BIDDING ONLY	293,494	100%	$ 293,494	0	TP 5-50% CD		293,494				$ 293,494	$ -
01-50	Exterior Scaffolding	No	589,927	0%	$ -	589,927	TP 5-50% CD	589,927					$ 589,927	$ -
01-55	Interior Scaffolding/Access	No	131,715	0%	$ -	131,715	TP 5-50% CD	131,715					$ 131,715	$ -
02-10	Mass Abatement (Abatement at Buildings to Remove)	No	862,057	100%	$ 862,057	0	TP 2-50% DD			$ 862,057			$ 862,057	$ -
02-20	Mass Demo (Buildings to be Removed)	No	2,385,136	18%	$ 429,324	1,955,812	TP 2-50% DD			$ 2,385,136			$ 2,385,136	$ -
02-40	Selective Demo & Abatement (Buildings to Remain)	No	4,979,298	18%	$ 896,274	4,083,024	TP 2-50% DD			$ 4,979,298			$ 4,979,298	$ -
02-50	Temp Shoring-(Non Soil Nail)	No	357,200	0%	$ -	357,200	TP 5-50% CD	357,200					$ 357,200	$ -
03-10	Structural Concrete, Allowances, Reinforcing Steel	Sole Source - Self Perform	15,848,599	0%	$ 2,354,296	13,494,303	TP 4-100% DD				15,848,599		$ 15,848,599	$ -
03-40	Arch/Structural Precast F&I	No	-340	0%	$ -	-340	TP 5-50% CD	-340					$ (340)	$ -
04-10	Facade Restoration, Terracotta Patching	No	860,814	0%	$ -	860,814	TP 4-100% DD	860,814					$ 860,814	$ -
04-20	CMU & Masonry Veneer	No	1,800,000	18%	$ 324,000	1,476,000	TP 4-100% DD	1,800,000					$ 1,800,000	$ -
05-20	Structural Steel, BRB;s, Joist/Mtl Decking, Stairs & Railings,- New Buildings	No	9,785,278	20%	$ 44,094	9,741,184	TP 4-100% DD			9,785,278			$ 9,785,278	$ -
05-25	Structural Steel - Old Buildings	No	3,900,000	20%	$ 780,000	3,120,000	TP 2-50% DD			3,900,000			$ 3,900,000	$ -
05-53	Metal Stairs & Railings & Misc. Metals - Old Buildings	No	1,081,184	18%	$ 194,613	1,081,184				$ 1,081,184	Push off to Trade Pkg 5, Historical Appeals may impact this			
05-54	Misc. Metals - New Buildings - Set Aside Package	Set Aside-MWESB BIDDING ONLY	413,892	100%	$ 413,892	0	TP 5-50% CD		413,892				$ 413,892	$ -
05-56	Misc. Metals - Site - Set Aside Package	Set Aside-MWESB BIDDING ONLY	466,700	100%	$ 466,700	0	TP 5-50% CD		466,700				$ 466,700	$ -
05-70	Railings Exterior (Building) - Set Aside Package	Set Aside-MWESB BIDDING ONLY	354,123	100%	$ 354,123	0	TP 5-50% CD		354,123				$ 354,123	$ -
06-10	Wood Framing/Rough Carpentry	Sole Source - Self Perform	907,494	0%	$ -	907,494	TP 4-100% DD				907,494		$ 907,494	$ -
06-10.GC1	Bldg D & I: Wood Framing/Rough Carpentry , Millwork - F&I, Casework, Gyp Bd, Framing, Ceilings, Lay in Clgs, Carpet/Resilient, Painting, Coatings	Direct Contract	847,761	100%	$ 847,761	0	TP 4-100% DD				847,761		$ 847,761	$ -
06-20	Millwork - Furnish & Install	No	811,015	18%	$ 145,983	665,032	TP 5-50% CD	811,015					$ 811,015	$ -
06-25	Woodwork Restoration	Sole Source - Self Perform	427,560	18%	$ 76,961	350,599	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD				427,560		$ 427,560	$ -
06-40	Casework	No	1,007,339	18%	$ 181,321	826,018	TP 5-50% CD		1,007,339				$ 1,007,339	$ -

			Valuation					Subcontract Selection Method						
BidPackage	Description	Contracting Method	Total Package Value	MWESB Participation- Based on Cost of Work ONLY	Value of MWESB Participation Targeted	Remaining Value of Package (NON MWESB)	Trade Package Number	A.1 - Public Bidding (Low Bid)	A.2 - Set Aside Public Bidding (COBID Firms Only Bid these Packages)	B Price/Qualifications (RFP)	C. Sole Source/Non-Competitive Strategic Partnership	D. Low Quote <$100,000	Total By Contracting	Variance Package Value vs. Contracting
06-45	Countertops Only - Set Aside	No	135,372	18%	$ 24,367	111,005	TP 5-50% CD		135,372				$ 135,372	$ -
07-10	Damproofing & Waterproofing	No	193,482	0%	$ -	193,482	TP 4-100% DD	193,482					$ 193,482	$ -
07-20	Insulation	No	-48,429	0%	$ -	-48,429	TP 4-100% DD	-48,429					$ (48,429)	$ -
07-25	WRB	No	376,447	0%	$ -	376,447	TP 4-100% DD	376,447					$ 376,447	$ -
07-50	Roofing	No	3,800,000	100%	$ 3,800,000	0	TP 4-100% DD	3,800,000					$ 3,800,000	$ -
07-60	Flashing & Sheet Metal, Incl. Metal Panels	Direct Contract	1,744,764	100%	$ 1,744,764	0	TP 4-100% DD				1,744,764		$ 1,744,764	$ -
07-65	Terracotta Rainscreen	No	300,000	0%	$ -	300,000	TP 4-100% DD	300,000					$ 300,000	$ -
07-70-GC.2	Roof Specialties & Accessories	No	22,500	0%	$ -	22,500	TP 5-50% CD		22,500				$ 22,500	$ -
07-80	Fire Proofing	No	269,950	0%	$ -	269,950	TP 4-100% DD	269,950					$ 269,950	$ -
07-90	Caulking & Sealants	No	133,725	0%	$ -	133,725	TP 5-50% CD	133,725					$ 133,725	$ -
07-95	Expansion Joint Covers	No	431,725	0%	$ -	431,725	TP 4-100% DD	431,725					$ 431,725	$ -
08-10	Doors, Frames, & Hardware (Inc. Exterior)	Direct Contract	2,292,131	100%	$ 2,292,131	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD				2,292,131		$ 2,292,131	$ -
08-10.2	Exterior Doors & Frames Historic Refurbish	No	273,164	100%	$ 273,164	0	TP 2-50% DD	273,164					$ 273,164	$ -
08-10.3	Exterior Doors - New Historic	No	173,902	100%	$ 173,902	0	TP 2-50% DD	173,902					$ 173,902	$ -
08-10.4	Interior Doors - Historic Replica	No	-51,750	18%	$ (9,315)	-42,435	TP 2-50% DD	-51,750					$ (51,750)	$ -
08-25	Special Doors-Operable Partitions (Marker Boards)	No	102,949	0%	$ -	102,949	TP 5-50% CD	102,949					$ 102,949	$ -
08-35	Overhead & Coiling Doors	No	403,184	18%	$ 72,573	330,611	TP 4-100% DD	403,184					$ 403,184	$ -
08-37	Wood Window Restoration	No	1,722,046	100%	$ 1,722,046	0	TP 2-50% DD	1,722,046					$ 1,722,046	$ -
08-38	Steel Window Restoration	No	635,197	100%	$ 635,197	0	TP 2-50% DD	635,197					$ 635,197	$ -
08-45	Fiberglass Window System - Furnish Only	No	1,443,076	0%	$ -	1,443,076	TP 4-100% DD	1,443,076					$ 1,443,076	$ -
08-46	Curtainwall	No	320,000	0%	$ -	320,000	TP 4-100% DD	320,000					$ 320,000	$ -
08-52	Fiberglass Window Systems - Install	No	810,221	0%	$ -	810,221	TP 4-100% DD	810,221					$ 810,221	$ -
08-53	Window Prep/Protection, Public Right of Way Horiz. Site Concrete, Site Furnishings	Direct Contract	1,058,551	100%	$ 1,058,551	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD				1,058,551		$ 1,058,551	$ -
08-60	Skylights	Direct Contract	375,000	100%	$ 375,000	0	TP 4-100% DD				375,000		$ 375,000	$ -
08-70	Auto Door Operators	No	16,800	0%	$ -	16,800	TP 5-50% CD	16,800					$ 16,800	$ -
09-20	Gyp Board, Framing, Ceiling & Wall Panels- NON Tbar Ceilings	No	14,000,000	25%	$ 3,500,000	10,500,000	TP 4-100% DD			14,000,000			$ 14,000,000	$ -
09-23	Plaster	Direct Contract	1,000,000	100%	$ 1,000,000	0	TP 4-100% DD				1,000,000		$ 1,000,000	$ -
10-25.GC2	Reinforced Polyurethane Wall Finish, Misc Specialties, Visual Display Surfaces, Toilet/Bath Specialties, Corner Guards	Direct Contract	740,059	100%	$ 740,059	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD				740,059		$ 740,059	$ -
09-30	Tiling	Direct Contract	400,000	100%	$ 400,000	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD				400,000		$ 400,000	$ -
09-40.1	Acoustic Ceilings -Lay in Only (includes all buildings except D&I)	Set Aside-MWESB BIDDING ONLY	850,000	100%	$ 850,000	0	TP 4-100% DD		850,000				$ 850,000	$ -
09-40.2	Stretch Wall (Currently only includes SFWS-1, SAW-2, SAW-3)	Direct Contract	560,000	100%	$ 560,000	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD				560,000		$ 560,000	$ -

			Valuation					Subcontract Selection Method							
BidPackage	Description	Contracting Method	Total Package Value	MWESB Participation- Based on Cost of Work ONLY	Value of MWESB Participation Targeted	Remaining Value of Package (NON MWESB)	Trade Package Number	A.1 - Public Bidding (Low Bid)	A.2 - Set Aside Public Bidding (COBID Firms Only Bid these Packages)	B Price/Qualifications (RFP)	C. Sole Source/Non-Competitive Strategic Partnership	D. Low Quote <$100,000	Total By Contracting	Variance Package Value vs. Contracting
09-60	Concrete Floor Finishes	No	1,370,102	0%	$ -	1,370,102	TP 5-50% CD	1,370,102					$ 1,370,102	$ -
09-64	Wood Flooring	No	323,129	0%	$ -	323,129	TP 5-50% CD	323,129					$ 323,129	$ -
09-65	Carpet & Resilient	No	1,349,327	18%	$ 242,879	1,106,448	TP 5-50% CD	1,349,327					$ 1,349,327	$ -
09-67	Fluid-Applied Flooring (Semco)	Direct Contract	124,659	100%	$ 124,659	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD				$ 124,659		$ 124,659	$ -
09-90	Painting & Coatings - Set Aside - Main Bldg	Set Aside-MWESB BIDDING ONLY	2,255,335	100%	$ 2,255,335	0	TP 5-50% CD		2,255,335				$ 2,255,335	$ -
10-15	Signage - Set Aside	Set Aside-MWESB BIDDING ONLY	-3,395	100%	$ (3,395)	0	TP 5-50% CD		-3,395				$ (3,395)	$ -
10-50	Lockers - Furnish & Install	No	490,340	0%	$ -	490,340	TP 5-50% CD	490,340					$ 490,340	$ -
10-60	Storage Assemblies - Furnish & Install	Set Aside-MWESB BIDDING ONLY	-822	100%	$ (822)	0	TP 5-50% CD		-822				$ (822)	$ -
11-10	Loading Dock Equipment	No	0	0%	$ -	0	TP 5-50% CD	0					$ -	$ -
11-30	Residential Appliances	No	2,000	0%	$ -	2,000	TP 5-50% CD	2,000					$ 2,000	$ -
11-40	Food Service Equipment	No	775,585	0%	$ -	775,585	TP 4-100% DD	775,585					$ 775,585	$ -
11-55	Lab Equipment	No	232,732	0%	$ -	232,732	TP 4-100% DD				$ -		$ -	$ 232,732
11-61	Theater & Stage Equipment	No	1,100,000	0%	$ -	1,100,000	TP 5-50% CD	1,100,000					$ 1,100,000	$ -
11-66	Athletic Equipment	No	513,880	0%	$ 18	513,862	TP 5-50% CD	513,880					$ 513,880	$ -
11-70	Healthcare Equipment	No	66,907	0%	$ -	66,907	TP 5-50% CD					66,907	$ 66,907	$ -
11-80	Solid Waste Handling Equipment	No	35,000	0%	$ -	35,000	TP 5-50% CD					35,000	$ 35,000	$ -
11-85	Fall Protection	No	40,000	0%	$ -	40,000	TP 5-50% CD					40,000	$ 40,000	$ -
12-20	Window Coverings	Direct Contract	595,096	100%	$ 595,096	0	TP 5-50% CD, With Early Award for Sole Source TP 4-100% DD				$ 595,096		$ 595,096	$ -
12-52	Auditorium Seating	No	0	0%	$ -	0	TP 5-50% CD						$ -	$ -
14-20	Elevators	No	650,000	0%	$ -	650,000	TP 4-100% DD	650,000					$ 650,000	$ -
21-00	Fire Sprinkler	No	1,774,402	18%	$ 319,392	1,455,010	TP 1-100% SD			1,774,402			$ 1,774,402	$ -
23-00	Plumbing, HVAC, Controls	No	26,556,182	25%	$ 6,639,046	19,917,137	TP 1-100% SD			26,556,182			$ 26,556,182	$ -
26-00	Electrical & Low Voltage Complete	No	24,696,094	18%	$ 4,445,297	20,250,797	TP 1-100% SD			24,696,094			$ 24,696,094	$ -
31-00	Earthwork	No	5,636,704	18%	$ 1,014,607	4,622,097	TP 4.5-100% DD+Prog Print Oct 2020			5,636,704			$ 5,636,704	$ -
31-00.1	Earthwork - Set Aside for ROW	Set Aside-MWESB BIDDING ONLY	113,758	100%	$ 113,758	0	TP 4.5-100% DD+Prog Print Oct 2020		113,758				$ 113,758	$ -
31-40	Permanent Shoring (Soil Nail Wall at Bldg B)	No	169,516	0%	$ -	169,516	TP-3-Shoring Package Only	169,516					$ 169,516	$ -
32-00	Asphalt Paving	No	99,214	0%	$ -	99,214	TP 5-50% CD	99,214					$ 99,214	$ -
32-15	Horizontal Site Concrete	Direct Contract	1,404,518	50%	$ 702,259	702,259	TP 5-50% CD				$ 702,259		$ 702,259	$ 702,259
32-25	Fences & Gates	No	153,710	0%	$ -	153,710	TP 5-50% CD	153,710					$ 153,710	$ -
32-30	Retaining Walls	No	589,142	10%	$ 58,914	530,228	TP 5-50% CD	589,142					$ 589,142	$ -
32-80	Landscaping & Irrigation - Set Aside	Set Aside-MWESB BIDDING ONLY	375,850	100%	$ 375,850	0	TP 5-50% CD		375,850				$ 375,850	$ -
32-85	Pavers - Group with Landscaping	Set Aside-MWESB BIDDING ONLY	43,712	100%	$ 43,712	0	TP 5-50% CD		43,712				$ 43,712	$ -
33-10	Striping	No	1,140	0%	$ -	1,140	TP 5-50% CD					1,140	$ 1,140	$ -
	Total Cost of Work Trade Packages		166,811,779	27%	$ 45,676,069	121,330,324		23,441,965		95,656,335	40,307,583	143,047	$ 164,795,604	$ 2,016,175

			Valuation					Subcontract Selection Method						
BidPackage	Description	Contracting Method	Total Package Value	MWESB Participation- Based on Cost of Work ONLY	Value of MWESB Participation Targeted	Remaining Value of Package (NON MWESB)	Trade Package Number	A.1 - Public Bidding (Low Bid)	A.2 - Set Aside Public Bidding (COBID Firms Only Bid these Packages)	B Price/Qualifications (RFP)	C. Sole Source/Non-Competitive Strategic Partnership	D. Low Quote <$100,000	Total By Contracting	Variance Package Value vs. Contracting
	Total Estimate, BHS Campus only - Target Value		$ 212,469,350											
	Cost of Work , Target Value		$ 166,597,712	$ 45,871,638	Difference between COW & Total Contract Value									
	Cost of Work Total-Trend in Current Estimate		$ 166,811,779	$ 45,657,571										
	Minimum Percentage-Aspirational Goal (Contract)		18%											
	Minimum Value to reach Contract Requirement (based on 18% Total Estimate Value)		$ 38,244,483											
	Current Planned MWESB participation		$ 45,676,069	21.50%	Actual MWESB Percentage based on Full Contract Value (not just COW)									
	Deficit to Goal / (Exceeds Goal)		$ (7,431,586)											

AUGUST 2020

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					Andersen internal Check in for Trade package 4 documents	1
2	3	4	5 Prebid preview to subs (Flyer, 75% DD ??)	6	7	8
9	10 Andersen internal review/finalize bid package 4 documents	11	12	13	14	15
16	17	18	19	20	21	22
23	24 Teachers return to Benson	25	26	27	28 Trade Package 4 review w/ PPS Send Draft Bid Package 4 to PPS	29
30	31 100% DD's Issued by Design Team					

PDF Calendar © calendarlabs.com

SEPTEMBER 2020

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1 Issue Trade Package 4 for sub bidding	2 NAMC Meeting	3	4 Bidder Assistance - Study Hall	5
		10 Day Bid Advertising				
		Subcontractor Bidding				
6	7 Labor Day	8	9 Non- Mandatory Zoom Meeting Bid Document w/ Bidders	10 Non- Mandatory Pre-Bid Walk Thru	11 OAME Meeting	12
10 Day Bid Advertising					Bidder Assistance - Study Hall	
		Subcontractor Bidding				
13	14 Final Questions due from BIdders	15	16 Bid Addendum, incorporate PPS Comments if needed	17	18 Bidder Assistance - Study Hall	19
	Subcontractor Bidding		PBDG Meeting			
20	21	22	23	24	25 Trade Package 4 Bids Due	26
	Subcontractor Bidding					
27	28	29	30			
	Bid Analysis					

PDF Calendar © calendarlabs.com

OCTOBER 2020

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
				TP 4 Bid Analysis		
4	5	6	7	8	9	10
	TP 4 Bid Analysis					
11	12 Columbus Day	13	14	15	16	17
	TP 4 Bid Analysis					
18	19	20	21	22	23	24
	Estimate Reconciliation & VE					
	TP 4 Bid Analysis					
25	26	27	28 Recommendation for Award to PPS. Including Precon CR for TP4 subs	29	30	31 Halloween
	Estimate Reconciliation & VE					

PDF Calendar © calendarlabs.com

NOVEMBER 2020

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	5	6	7
	Continuation of VE					
8	9	10	11 Veterans Day	12	13	14
	Continuation of VE					
15	16 100% DD Reconciliation and VE Complete	17	18 PPS Notification to Andersen for Award Approvals.	19 Notify Subs of intent to award	20 Issue Subcontracts/Execute	21
22	23 PPS Estimate Approval	24	25	26 Thanksgiving Day	27	28
	Issue Subcontracts/Execute					
29	30					

PDF Calendar © calendarlabs.com

DECEMBER 2020

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25 Christmas	26
27	28	29	30	31		

PDF Calendar © calendarlabs.com

JANUARY 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1 New Year's Day	
3	4	5	6	7	8	
10	11 50% CD's Issued by Design Team	12	13	14	15	
	10 Day Bid Advertising					
17	18 M L King Day	19	20	21	22	
	10 Day Bid Advertising					
24	25	26	27	28	29	
31						

PDF Calendar © calendarlabs.c

FEBRUARY 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1	2	3	4	5	
7	8 Trade Package 5 Bids Due	9	10	11	12	
14 Valentine's Day	15 Presidents' Day	16	17	18	19	
21	22	23	24	25	26	
28						

PDF Calendar © calendarlabs.c

MARCH 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1	2	3	4	5	
7	8 50% CD Cost Estimate Issued	9 PPS / Andersen Draft & Approve Early Work Package: notice to Proceed for Demo/Abatement/Mob & Other early work (4 Weeks)	10	11	12	
	Estimate Reconciliation & VE					
14	15 PPS / Andersen Draft & Approve Early Work Package: notice to Proceed for Demo/Abatement/Mob & Other early work (4 Weeks)	16	17	18	19	
	Estimate Reconciliation & VE					
21	22 PPS / Andersen Draft & Approve Early Work Package: notice to Proceed for Demo/Abatement/Mob & Other early work (4 Weeks)	23	24	25	26	
	Estimate Reconciliation & VE					
28	29 PPS / Andersen Draft & Approve Early Work Package: notice to Proceed for Demo/Abatement/Mob & Other early work (4 Weeks)	30	31			
	Estimate Reconciliation & VE					

PDF Calendar © calendarlabs.c

APRIL 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1	2 Good Friday	
4 Easter Sunday	5	6	7	8	9	
		PPS Estimate Approval Process- for GMP				
11	12	13	14	15	16	
	PPS Estimate Approval Process- for GMP					
18	19	20	21	22	23	
	GMP Contract Amendment Document Prep Process (4 Weeks)					
25	26	27	28	29	30	
	GMP Contract Amendment Document Prep Process (4 Weeks)					

PDF Calendar © calendarlabs.c

MAY 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
2	3 GMP Contract Amendment Document Prep Process (4 Weeks)	4	5	6	7	
9 Mother's Day	10 GMP Contract Amendment Document Prep Process (4 Weeks)	11	12	13	14	
16	17 PPS Internal Ebuilder Approval Process of GMP Amendment 1st Round Permit Comments Issued (18W)	18	19	20	21	
23	24 PPS Internal Ebuilder Approval Process of GMP Amendment	25	26	27	28	
30	31 Memorial Day					

PDF Calendar © calendarlabs.c

JUNE 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
		1	2	3	4	
	PPS Internal Ebuilder Approval Process of GMP Amendment				Last Day of School	
6	7	8	9	10	11	
	PPS Move Out Process (8 W)					
	PPS Issues Notice to Proceed					
13	14	15	16	17	18	
	PPS Move Out Process (8 W)					
20 Father's Day	21	22	23	24	25	
	PPS Move Out Process (8 W)					
27	28	29	30			
	PPS Move Out Process (8 W)					

PDF Calendar © calendarlabs.c

JULY 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
				1	2	
4 Independence Day	5 Independence Day Holiday PPS Move Out Process (8 W)	6	7	8	9	
11	12 PPS Move Out Process (8 W)	13	14	15	16	
18	19 PPS Move Out Process (8 W)	20	21	22	23	
25	26 PPS Move Out Process (8 W)	27	28	29	30	

PDF Calendar © calendarlabs.c

AUGUST 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1	2	3	4	5	6	
8	9	10	11	12	13	
15	16	17	18	19	20	
22	23	24	25	26	27	
29	30	31				

PDF Calendar © calendarlabs.c

SEPTEMBER 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	
5	6 Labor Day	7	8	9	10	
12	13	14	15	16	17	
19	20	21	22	23	24	
26	27	28	29	30		

PDF Calendar © calendarlabs.c

OCTOBER 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
					1	
3	4	5	6	7	8	
10	11 Columbus Day	12	13	14	15	
17	18	19	20	21	22	
24	25	26	27	28	29	
31 Halloween						

PDF Calendar © calendarlabs.c

NOVEMBER 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
	1	2	3	4	5	
7	8	9	10	11 Veterans Day	12	
14	15	16	17	18	19	
21	22	23	24	25 Thanksgiving Day	26	
28	29	30				

PDF Calendar © calendarlabs.c

DECEMBER 2021

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
			1	2	3	
5	6	7	8	9	10	
12	13	14	15	16	17	
19	20	21	22	23	24	2 Christm
26	27	28	29	30	31	

PDF Calendar © calendarlabs.c

REQUEST FOR PROPOSALS
Benson High School Modernization
Trade Package 1—MEP/FP

September 6, 2019

TABLE OF CONTENTS

1. Request for Proposals & Instructions

2. Estimating Forms including the following:
   - 02.1 – Budget Breakdown Diagram
   - 02.2 – Budget Breakdown Forms (Bid Form on Building Connected)
   - 02.3 – Cost Inclusion Matrix
   - 02.4 – Preconstruction Services Estimate Form (to be issued with Addendum #1)
   - 02.5 – OCIP Credit Calculation Worksheet

3. Scope of Work – See Building Connected Bid Form (Acts as Subcontract Exhibit #1-Scope Clarifications upon Award. Preconstruction scope to be issued with Addendum #1)
   - 03.1 – Building Connected Bid Form (includes scope of work)
   - 03.2 – Temp Services Information for Scopes

4. Document Listing (Acts as Subcontract Exhibit #3 upon Award):
   - Bassetti Architects 100% SD Package:
     - 100% Schematic Design Drawings dated 8/19/19
     - 100% Schematic Design Booklet dated 8/19/19
     - 100% Schematic Design Appendix dated 8/19/19
     - Deviations from PPS Standards dated 8/19/19
   - PPS Standards:
     - Site Specific Educational Specification 12/11/18-For Reference
     - PPS Design Standards 5/7/19-(Use this to complete the Bassetti document information, since specifications are not included with 100% SD, do not deviate from PPS Design Standards in estimating)
   - Record Drawings-Primarily Structural, Reorganized/Sheets renamed by KPFF for clarity
   - Reports: The following Environmental, Historical, and Diligence Reports are provided for information.
     - 1.0-BHS-PBS-20190906 Revised Haz Mat Survey Report
     - 1.0-BHS-PSI-ENV-20170123-Phase I ESA Benson Polytechnic High School
     - 1.0-BHS-PSI-ENV-20171012- Automotive Bldg - Phase II ESA
     - 1.0-BHE-Subgrade Conditions Map (Tanks) and Scope of Work_190710 Update
     - 2.0-BHS-20171016 Rhino One-Geotech Report
     - 2.0-BHS-20190122 Rhino One- Geotech Report-Addl Borings
     - 3.0-Bassetti-20170612_BPHS Pre-Diligence Report
     - 3.0-Bassetti-20171031_BPHS Artifacts Assessment
     - 4.0-Historic- 20090602Entrix Historic Site Form
   - Revit Model (for reference only)

5. Schedule (Acts as Subcontract Exhibit #4 upon Award)

   A. Project Design & Preconstruction Schedule Dated August, 2019
   B. Construction Schedule Dated 8/5/19

6. Subcontractor Prequalification Requirements

7. Subcontractor Agreement Form and Applicable Subcontract Exhibits:
   - Exhibit 1—Scope Clarifications (see item 3 above)
   - Exhibit 2A—Terms & Conditions for Subcontracts
   - Exhibit 3—List of Contract Documents (see item 4 above)
   - Exhibit 4—Project Schedule (see item 5 above)
   - Exhibit 5—Site Specific Work Regulations
     - 5.1 – BHS PPS/Andersen Prime Agreement (redacted). The entire contract is attached to the Subcontract as per Prime Agreement flow down language

requirements. Select Exhibits are attached as part of the subcontract to implement various programs/enrollment, listed below.
    - 5.2 – Career Learning Requirements
    - 5.3 – Contractor Workforce Training & Hiring Program
    - 5.4 – Insurance Requirements - PPS OCIP Guidebook & Enrollment Forms - Sample
    - 5.5 – Insurance Requirements - PPS Non-OCIP - Sample
    - 5.6 – BIM Execution Plan (To be issued with Addendum #1)
    - 5.7 – BOLI Wage Rates July 2019, for Reference Only (January 2020 rates to be used on project. Will be provided when released.)

- Exhibit 6—Site Logistics Plan
- Exhibit 7—Cost Definition for GMP Subcontracts
- Exhibit 8—Design Build Requirements
- Exhibit 9—BIM Execution Plan, (see item 5.6 above)
- Exhibit 10—Minimum Insurance Requirements – Non-OCIP work ($10M or more)
- Exhibit 10—Minimum Insurance Requirements – Non-OCIP work (under $10M)
- Exhibit A—Safety Handbook 2018
- Exhibit B—Anti-Harassment Policy 2018
- Exhibit C—Safety Disciplinary Policy
- Exhibit D—Accounting Procedures

Request for Proposals

Benson High School Modernization

Trade Package 1- MEP/FP Request for Proposal

September 6th, 2019

Reference: **Benson High School Modernization**
Portland, Oregon

Subject: **Trade Package 1 – MEP / FP Request for Proposals**

Due Date: **Thursday October 3rd, 2019 @ 2:00 PM**

Andersen Construction is seeking proposals from qualified trade partners for the Benson Highschool (BHS) Modernization project, for the scopes of work as listed in the table below.

Andersen will use the request for proposals (RFP) competitive procurement process to select and enter into a contract with the successful trade partner. Please refer to table below for contract type and contract phasing for the various scopes of work.

Contracts will initially include Preconstruction Phase Services only. There are provisions for adding Construction Phase Services through acceptance of a Guaranteed Maximum Price by contract amendment. This would occur at approximately 50% CD documents.

Andersen Construction will evaluate each proposer's capabilities with respect to the evaluation criteria set forth in the RFP Documents. To more fully understand the finalists' relative qualifications, the selection committee will select finalists to be interviewed by the selection committee. Trade partner final scoring will be cumulative of the RFP, peer scoring, and interview.

This RFP does not commit Andersen Construction to enter into any agreement, to pay any expenses incurred in preparation or delivery of any response to this request, or to procure or contract for any supplies, goods, or services. Andersen Construction reserves the right to accept or reject any or all proposals not in compliance with the RFP or if it is in the public interest to do so.

I. PROJECT SCOPE, BUDGET, SCHEDULE:

The Benson Highschool (BHS) modernization is a comprehensive retrofit of the existing BHS facility including 212,084 GSF of renovation and 175,680 GSF of new construction for a total of 387,764 GSF of total scope. The campus includes 10 buildings all of which are 2-3 stories and some of which are a part of the historic register and will have special provisions related to respect for their historic fabric. The campus includes a variety of program spaces including an auditorium, two gymnasiums, a variety of classroom types and administrative functions and a library. The campus also includes Career Technical Education (CTE) teaching environments for disciplines like woodworking, metalsmithing, forging, construction, and automotive among others. Mechanical space is distributed throughout the campus and the majority of the main mechanical equipment is located in basements or rooftops.

The overall estimated Construction Budget is $225 million.

Project is scheduled to break ground in June of 2021 with an estimated completion date of July of 2024.

Please refer to Andersen Construction's Front End Documents for a detailed project schedule, along with a detailed listing of scope requirements for the overall project and for each bid package.

II. SCOPE OF REQUEST FOR PROPOSALS:

The general description of work for this Request for Proposals is as follows (reference Andersen Construction Front End Documents for detailed scope information):

Bid Package #	Scope of Work	Contract Type
21-00	Fire Protection (Design Build)	GMP Preconstruction + GMP Construction
22-00	Plumbing (Design Assist)	GMP Preconstruction + GMP Construction
23-00	HVAC & Controls (Design Assist)	GMP Preconstruction + GMP Construction
26-00	Electrical & Low Voltage Systems (Design Assist) Photo Voltaic (Design Build)	GMP Preconstruction + GMP Construction

III. SCOPE OF PRECONSTRUCTION SERVICES FOR DESIGN ASSIST:

Andersen Construction is bringing MEP & FP trade partners on board early in design to build a collaborative working team and to fully incorporate your experience and expertise in a Design Assist capacity for the project. The Preconstruction phase of the project will last approximately 18 months from the date the contract will be executed. **Although costing is a component of the selection, selection will be based on the highest perceived value the trade partners will bring to the project and project team in the 9 categories listed below.**

Trade partners are expected to co-locate with the BHS team during pre-construction-refer to scope of work for extent of Colocation. Services will include review and estimate of progress documents at a minimum of every two weeks during preconstruction, to drive toward the established target values. The trade partner will submit a final construction cost estimate at the end of each progress set for review and approval by Andersen Construction and will work with Andersen Construction to reconcile any discrepancies and provide breakouts and supporting detail as required to do so. Full engagement of trade partner is expected to help coordinate documents, find cost savings and added value for the Owner. To this end, Trade partner will attend coordination / cost meetings approximately once per week, with additional meetings as necessary.

Trade partner is expected to maintain proposed budget throughout preconstruction. Failure to do so, or to provide detailed and accurate justification for changes may be cause for Andersen Construction to deny progression to the final GMP contract.

Review of documents shall incorporate a full review of specifications. Document review shall also include coordination of BIM, new and existing utilities, current codes, and constructability.

Reference Item 7 - Subcontract Exhibit 5.6 - BIM Execution Plan in the RFP Documents.

PROPOSAL DOCUMENTS:

Detailed RFP instructions and scoring criteria, along with 100% SD documents and all ACCO RFP Documents are available for downloading through Building Connected, the program from which the RFP was sent.

In addition, documents will be available at many plan centers. Please notify Andersen Construction with your requests for posting at specific plan centers.

Carefully read and follow all RFP instructions detailed below. Failure to do so may result in disqualification.

Each proposal shall include all requirements of the Request for Proposals, Project Conditions, and all other Andersen Construction Front End Documents, and complete SD design documents.

Correspondence will come from Andersen Construction's invitation to bid software, Building Connected. Please be sure to unblock Building Connected from your email to ensure receipt of project notifications.

Andersen Construction will attempt to inform proposing trade partners as new documents are issued; however, it is ultimately the responsibility of the Proposing trade partner to stay informed and ensure review of all contract documents has occurred.

IV. PROPOSAL DELIVERY:

All proposals will be received through Building Connected. Bidders will be responsible for filling in all blank fields on the online bid form and submitting by prior to ***2:00 PM on October 3rd, 2019.*** All documents requested by the RFP shall be attached, along with any additional information you wish to submit, to your Building Connected submission. If you need help submitting your proposal through Building Connected, please contact Elizabeth Juhala at ejuhala@andersen-const.com.

To be considered, the Estimate portion of your proposal **must be submitted on the Bid Form provided on Building Connected.** The bid form breaks the scope down by the systems identified in the MEP Narrative (see 100% SD Booklet), and also by Building. This is a requirement of the Owner, but for accounting purposes only. Additional scope clarifications may be made on your letterhead as an attachment to the required form.

V. RFP SELECTION TIMELINE:

September 9th, 2019	RFP Advertisement issued
September 11th, 2019	**Mandatory Pre-Proposal Meeting**
September 16th, 2019	Release of Addendum # 1 (as needed)
September 20th, 2019	Final questions due to Andersen Construction
September 25th, 2019	Release of Addendum # 2 (as needed)
October 3rd, 2019	**RFP Responses due**
October 16th, 2019	Interviews Day 1-Mechanical/Plumbing
October 17th, 2019	Interviews Day 2-Electrical (and add'l Mech if needed)
October 18th, 2019	Interviews Day 3- Fire Protection (and Elec con't if needed)
October 25th, 2019	Andersen Recommendations to PPS for Review
November 1st, 2019	PPS Notification to Andersen for Award Approvals
November 4th, 2019	Andersen Notification to Subcontractors of Intent to Award

VI. CONTRACTING STRATEGY:

See table above for proposed contract type for each trade package, and refer to Andersen Sample subcontract and supporting exhibits that will be substantially similar for this project. For those proposers ultimately entering into a GMP contract, the initial scope of the contract will be limited to Preconstruction Services as detailed in Section III above. The trade partner will submit a final construction cost estimate at the end of each phase for review and approval by Andersen Construction and will work with Andersen Construction to reconcile any discrepancies and provide breakouts and supporting detail as required to do so.

Acceptance or rejection of the final construction documents phase (50% CD / GMP) construction cost estimate will constitute completion of Preconstruction Phase Services. If Construction Phase Services are added to the contract through authorization of early work or acceptance of a GMP, an amendment to the contract will be executed. If Andersen Construction chooses not to continue the GMP contract beyond the completion of Preconstruction Services, the trade partner's compensation will be limited to the Preconstruction Services maximum not-to-exceed fee stated in the Contract.

VII. QUESTIONS:

Please direct your scope questions in writing via email to the following, or through Building Connected:

Erin Storlie, Preconstruction Manager – estorlie@andersen-const.com
Emily Hager, Regional Estimating Manager, Oregon – ehager@andersen-const.com

At no time shall a proposing trade partner contact the owner, architect, consultants, or sub-consultants directly.

VIII. SELECTION CRITERIA & SCORING:

Please limit your RFP response to a maximum of 10 pages. Cover pages, dividers, estimate, and team resumes do not count in the page count.

Item #	Item Description	Point Value
0.	***Prerequisites*** • *Andersen Prequalification* • *Bonding Capacity (10 Million)* • *Specialized Experience (5 projects of similar size/complexity/scope)* • *Experience in working for large public entities* • *Availability*	0
1.	***GMP Budget Estimate*** • *Provide a budget based on the current 100% SD set of documents/narrative. Due to PPS cost tracking requirements, budget must be broken down by building. See Budget Breakdown Diagrams, and Bid Form on Building Connected prior to starting estimating. Clarifications, Assumptions, and any other information can be submitted on your letterhead and attached to the Budget Breakdown Form, within Building Connected.* • *Provide a list of items and associated costs you included in your estimate, but that are not shown on documents.* • *Provide cost of payment and performance bond where indicated on the budget breakdown form.* • *Provide credit for OCIP (General Liability insurance)* • *Include all taxes, Including Oregon Corporate Activities Tax* *Forecast Labor to represent cost at time of execution, including all BOLI wage rates. This should be included in all line items in the Bid Form.* *Material costs should represent today's cost. The bid form requires a separate line item for your recommended escalation cost for MATERIALS to get to the time of project execution. All costs for escalation are to be included in budget estimate.* *This section will be scored based upon a deviation from the median cost proposed by the field of proposers to encourage complete and thoughtful budgeting with less than construction documents. Labor rates will be reviewed and negotiated prior to the execution of the agreement.*	10

	Example Outcome with 5 proposers: *Proposed costs construction services: $3M, $3.2M, $3.5M, $3.75M, and $4M.* *Median Cost: $3.5M* *Point Distribution based on 10 points available:* *$3.00M – 8.6* *$3.20M – 9.1* *$3.50M – 10.0* *$3.75M – 9.3* *$4.00M – 8.6*	
2.	***Stated Cost for Preconstruction Services (GMP Dollar Amount)*** *List the not-to-exceed amount required to complete preconstruction services as detailed in section Preconstruction Scope of Work.* *This section will be scored based upon a deviation from the median cost proposed by the field of proposers to reward a thoughtful and complete response.* ***Example Outcome with 5 proposers:*** *Proposed costs for Preconstruction Services: $45,000, $50,000, $60,000, $62,000, and $77,000* *Median Cost: $60,000* *Point Distribution based on 5 points available:* *$45,000 – 3.8* *$50,000 – 4.2* *$60,000 – 5.0* *$62,000 – 4.8* *$77,000 – 3.6*	5
3.	***Stated Cost for Preconstruction BIM Services (GMP Dollar Amount)*** *List the GMP, not-to-exceed amount required to complete BIM from 100% SD to 50% CD/GMP.* *This section will be scored based upon a deviation from the median cost proposed by the field of proposers.* ***Example Outcome with 5 proposers:*** *Proposed costs for BIM services: $45,000, $50,000, $60,000, $62,000, and $77,000* *Median Cost: $60,000* *Point Distribution based on 5 points available:* *$45,000 – 3.8* *$50,000 – 4.2* *$60,000 – 5.0* *$62,000 – 4.8*	5

	$77,000 – 3.6	
4.	***Stated Overhead and Profit for Construction Services (Percentage of Direct Cost of Work)*** *List the overhead and profit required to complete construction services as a percentage of the direct cost of work (see budget breakdown form). Preconstruction and BIM services are not part of the Direct Cost of Work. Refer to Cost Inclusion Matrix.* *The firm with the most competitive fee will be awarded the maximum number of points available. Other proposers will receive a score that is calculated by dividing the most competitive fee by their fee and multiplying the result by the total score available.* ***Example Outcome with 5 proposers:*** *Point Distribution based on 10 points available:* *2.25% - 10 points* *2.45% - 9.2 points* *2.50% - 9.0 points* *2.60% - 8.7 points* *3.00% - 7.5 points*	10
5.	***Team*** *Provide resumes for the following team members, and list 3 projects demonstrating his/her expertise. Provide each person's current work load. Also highlight which members have worked together on each project.* • *Preconstruction Manager (if different than Project Manager or Estimator)* • *Estimator (if different than Preconstruction Manager and Project Manager)* • *BIM Manager* • *Project Manager* • *Onsite Superintendent* • *Corporate Safety Officer* *If you are moved to the interview round, this section will be sent to the other potential trade partners for peer scoring.*	15
6.	***Project Approach*** • *Discuss your team's experience with collaborative projects, or projects with robust preconstruction services.* • *Discuss your team's approach to BIM coordination after 50% CD (GMP).* • *Discuss your team's experience with Last Planner and Pull Planning and if you would recommend it for this project.* • *List your best creative ideas that you would love to implement on this project.*	30

	• *Discuss your team's experience on projects with existing buildings/historic elements.* • *Discuss your team's commitment to safety.* • *Talk about ways your company has dealt with the challenge of tight site and difficult logistics. This should include material and equipment procurement to ensure products are ordered on time, arrive at the appropriate time.* • *Discuss specific opportunities for off-site fabrication and the potential for MWESB participation in that process.* • *Discuss your approach to quality control and deficiency tracking.*	
7.	***Estimating and Target Value Design Approach*** • *Discuss your experience managing the preconstruction process on budget-challenged projects and target value design. How do you help establish and maintain a competitive budget to ensure Owner has cost certainty and gets the best value from the design/assist award process?* • *Discuss your approach to cost control during construction to minimize change orders and re-work.* • *Provide a list of four projects that were successful:* 1. *List your firm's Original Proposal or GMP budget estimate and contingencies for your firm's scope of work.* 2. *List point in design when GMP was established and associated contract amount.* 3. *List the Final Construction Cost after all change orders were settled.*	10
8.	***MWESB / Business and Workforce Equity Approach*** *Project is subject to PPS Career Learning Requirements, Contractor Workforce Equity, and MWESB participation goal.* • *Provide documentation of state certification to receive maximum points.* • *Discuss your project specific plan for achieving a minimum of 25% MWESB participation.* • *Discuss your project specific plan for achieving workforce equity requirements.* • *Demonstrate your success on at least 3 projects achieving MWESB participation and workforce equity. State project, goal, and actual for each.* • *Provide a list of 3 references where MWESB actual participation exceeded 20%. List project name, General Contractor or Client name and contact information.* • *Provide a list of items (if any), within the Andersen Construction Subcontract, or other scoping documents that may be unnecessarily driving cost or creating unnecessary obstacles for MWESB firms.*	10

9.	***BIM Experience / Approach*** • *Discuss your project specific approach to BIM for the BHS project. See Andersen Construction Subcontract Exhibit 5.6– BIM Execution Plan. If your firm does not currently have experience with BIM, please discuss how your team will perform this task.* • *Provide examples of lessons learned on other projects.*	5
	TOTAL POINTS AVAILABLE:	**100**

Andersen Construction GENERAL RFP PROCESS / REQUIREMENTS

1. Receipt and Opening of Proposals

   Proposals for bid packages will be received by Andersen at the time, location, and manner indicated above. No Proposals will be received after the date and time set forth in the Proposal Solicitation. There will not be a public opening of proposals.

2. Bid Bond Requirements
   A Bid Bond is not required.

3. Performance and Payment Bonds
   A 100% Performance and Labor and Material Payment Bond may be required at the Owner and General Contractor's discretion. The proposed bonding company shall be acceptable to Andersen and the bonds must be submitted on the forms attached to the subcontract form. Provide cost for bond on Estimate Breakout Form.

4. Withdrawal or Revision of Proposals
   Any Proposal may be withdrawn or revised in writing prior to the scheduled time for public Proposal opening. After opening, no Proposal may be withdrawn for sixty (60) calendar days.

5. Award of Contract
   The competency and responsibility of Proposers and of their proposed trade partners will be considered in making the award. Owner and Andersen Construction are not obligated to accept the lowest or any other Proposals. Owner reserves the right to reject the Proposal of any Proposer who has previously failed to perform properly and to complete on-time contracts of a similar nature, who is not able to perform the contract, who has habitually and without cause neglected the payment of bills or otherwise disregarded their obligation to the trade partners, material suppliers, or employees. In determining the lowest responsible Proposer, Owner and Andersen will also consider whether the Proposer (a) has current and approved prequalification form on file with Andersen, (b) is able to meet all applicable OSHA regulations for applicable state, (c) maintains a permanent place of business, (d) has adequate equipment and manpower to do the work properly and expeditiously, (e) has suitable financial status to meet all obligations incident to the work, (f) has appropriate technical knowledge, and (g) is able to comply with the completion date.

Andersen and the Owner reserve the right to reject any or all Proposals not in compliance with all prescribed Proposal procedures and requirements and other applicable laws, and Andersen and the Owner may reject for good cause any or all Proposals upon Andersen and/or the Owner finding that it is in its best interest to do so. Andersen and the Owner may waive any informality in the Proposal process.

6. Examination of Contract Documents
Before submitting a Proposal, Proposers should 1) carefully examine the Contract Documents, 2) attend the Pre-Proposal meeting at the time and date indicated in the above, 3) review Andersen's project conditions and scoping documents 4) fully inform themselves as to all existing conditions and limitations, including those of labor, progress of work to date, if any, and shall include in the Proposal a sum sufficient to cover the cost of all items contemplated by the Contract Documents. No consideration will be granted for all alleged misunderstanding of the material, article or piece of equipment to be furnished or work to be done, it being understood that the tender of a Proposal carries with it the agreement to all items and conditions referred to herein or indicated in the Contract Documents.

Trade partner must acknowledge that they will sign the standard Andersen Subcontract unmodified or unaltered. Failure to acknowledge will disqualify trade partner at Andersen discretion.

7. Interpretations, Discrepancies and Omissions
If Proposer is in doubt as to the true meaning of any part of the Contract Documents, he shall submit a written request to Andersen for interpretation. Proposer submitting request is responsible for its prompt and actual delivery. Neither Andersen nor the Architect/Engineer is responsible for any explanations or interpretations of such documents, which anyone presumes to make, other than by Addendum, or written response.

8. Addenda
All Addenda issued during the time of Proposing shall become a part of the Contract Documents and receipt thereof shall be listed in the Proposals.

9. Prequalification Process
Subcontracts will be awarded **only** to firms that have obtained "Pre-Qualified" status with Andersen Accounting, Operations, and Safety Departments. If a current and approved Pre-Qualification Form for subcontracting firm is not on file with Andersen already, one must be submitted within 48 hours of Proposal submission. If trade partner fails to submit a Pre-Qualification Form within the required time period, Andersen reserves the right to proceed to the next qualified Proposer for award. The Pre-Qualification requirements are included in RFP Document 6-Subcontractor Prequal (Using Compass).

16. Licensing & Bonding
All Proposers submitting a Proposal must be licensed and bonded and have all applicable endorsements as required by the applicable state's contractor's board or the Proposal will not be received or considered. A Proposal from an unregistered Proposer will be rejected as unresponsive.

A Proposer shall file with the applicable jurisdiction, a public works bond with a corporate surety authorized to do business in the State of Oregon in the amount required by the Oregon Construction Contractor's Board prior to the date of award.

End of Document

Benson High School

546 NE 12th Ave, Portland OR, 97232

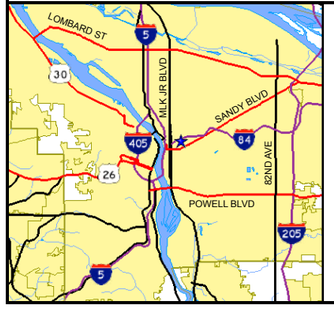
View Site in Google Maps

Building Periods

1. Main Building (115A), 1916
2. North Shop Wing (115C), 1917
3. South Shop Wing (115D), 1918
4. Old Gymnasium (115E), 1925
5. Auditorium (115F), 1930
6. Aeronautics/ Automotive Shops (115G), 1953
7. Library Science Addition (115A), 1953
8. New Gymnasium (115H), 1964
9. New Library Addition (115J), 1991
10. KPBS (115K), 1992

Construction of Benson High School Industrial Arts Building from scaffolding of first unit, looking northeast, 1917.

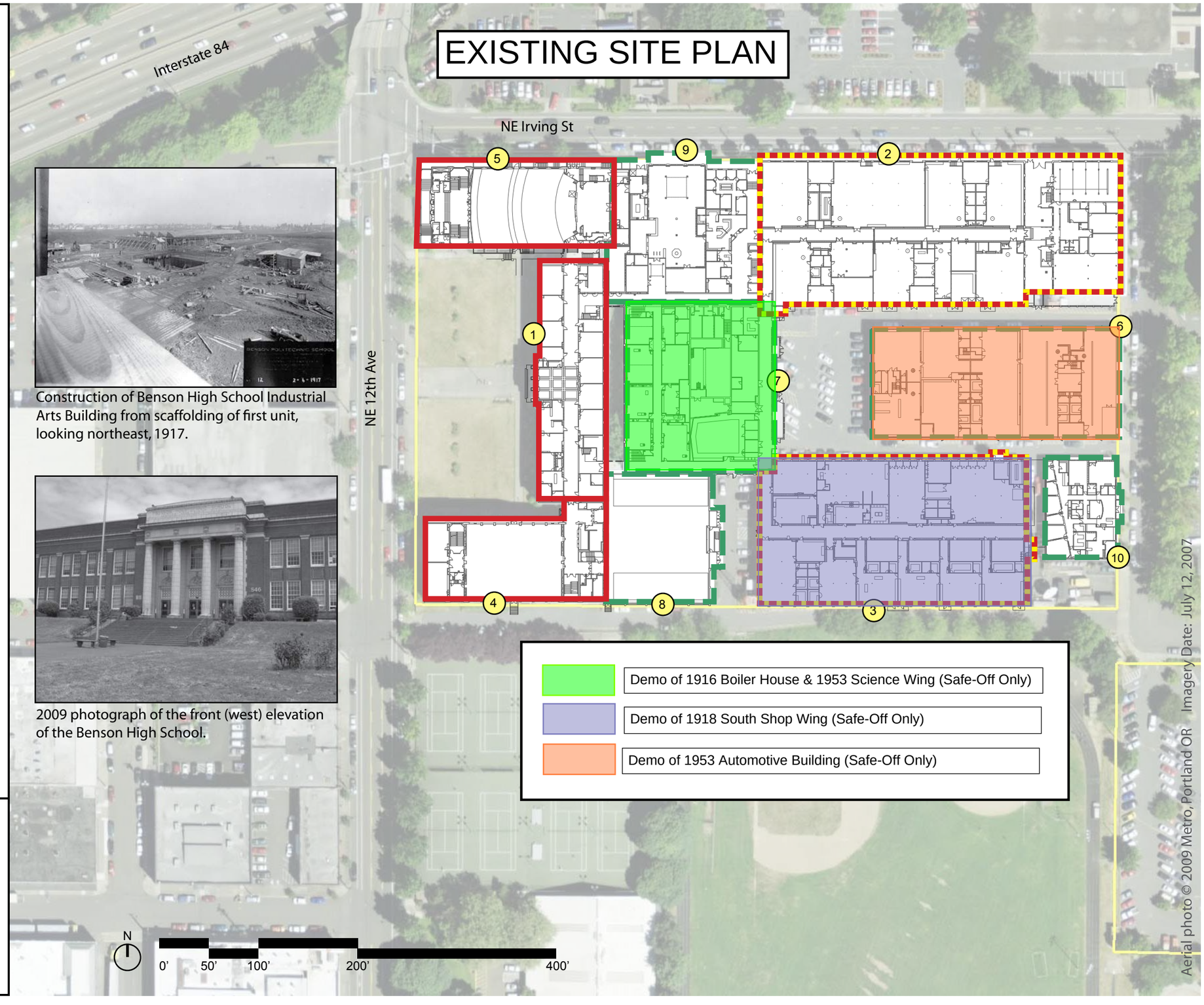
2009 photograph of the front (west) elevation of the Benson High School.



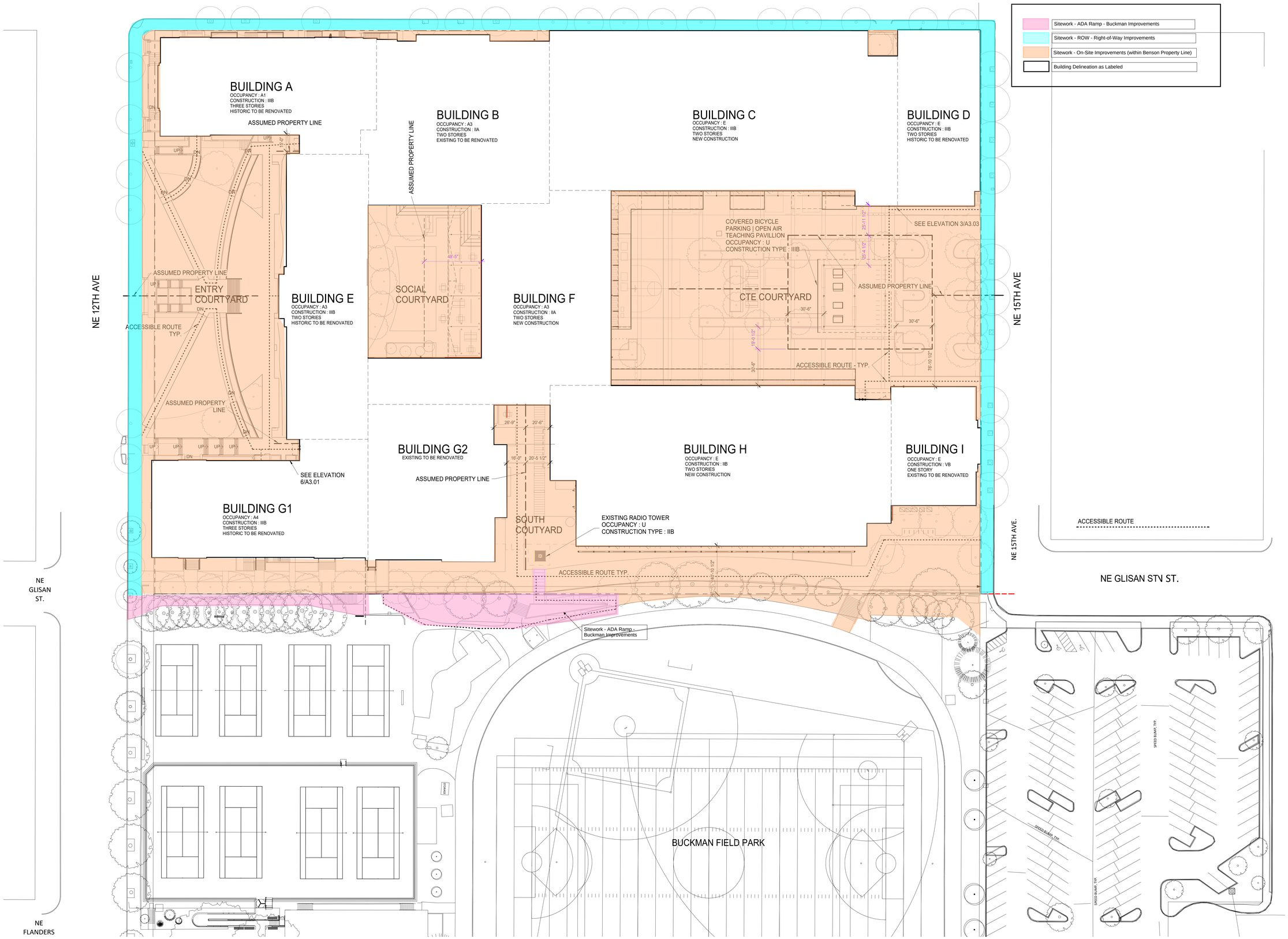
Historical Significance and Building Integrity

- Contributing High Significance
- Contributing Moderate Signif.
- Non-Contributing

EXISTING SITE PLAN



NEW SITE PLAN



SITE PLAN

1" = 30'-0"

8/16/2019 4:30:29 PM

503 Dixon Street
Portland, Oregon 97227
T (503) 916 3778

bassetti architects

721 NW 9th Ave, Suite 350
Portland, Oregon 97209
T (503) 224 9162 F (206) 340 9519

CIVIL ENGINEER
BHE Group
940 Willamette St., Suite 310
Eugene, OR 97401
t 541-686-847

LANDSCAPE ARCHITECT
Mayer/Reed
319 SW Washington #820
Portland, OR 97204
t 503-223-5953

STRUCTURAL ENGINEER
KPFF
111 SW Fifth Ave., Suite 2500
Portland, OR 97204
t 503-764-0526

MECHANICAL ENGINEER
PAE Engineering
522 SW 5th Ave., Suite 1500
Portland, OR 97204
t 503-596-8619

ELECTRICAL ENGINEER
Reyes Engineering
321 NE Couch St., Suite 403
Portland, OR 97232
t 503-771-1986

LIGHTING CONSULTANT
O-LLC Lighting Design
5831 N. Albina Ave.
Portland, OR 97217
t 503-341-7882

FOOD SERVICE CONSULTANT
JBK Consulting and Design, Inc.
6217 NE Cherry Drive
Hillsboro, OR 97124
t 503-686-8958

AUDIO VISUAL CONSULTANT
Greenbusch Group
1900 W Nickerson St, Suite 201
Seattle, WA 98119
t 206-378-0569

THEATER CONSULTANT
PLA Designs
5285 NE Elam Young Pkwy
Suite B500
Hillsboro, OR 97124
t 503-624-2168

HISTORIC PRESERVATION
Architectural Resources Group
720 SW Washington Street, Suite 300
Portland, OR 97205
t 971-206-5324

HAZMAT CONSULTANT
PBS Engineering and Environmental
4412 SW Corbett Ave
Portland, OR 97239
t 503-248-3968

ENERGY/ENVIRONMENTAL
Lensa Consulting
7205 SE 18th Ave
Portland, OR 97202
t 503-467-1239

ONE INCH
AT FULL SIZE

#	REVISIONS	DATE

Portland Public Schools

BENSON POLYTECHNIC HIGH SCHOOL MODERNIZATION

546 NE 12th Ave, Portland, OR 97232

JOB NO: 16995
ISSUE DATE: 08/19/2019

Jurisdiction Stamp Area

100% SCHEMATIC DESIGN

ARCHITECTURAL SITE PLAN

G1.01

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

Bid package created on Sep 5, 2019 at 2:03 PDT

Andersen Construction Company

6712 N Cutter Cir, Portland, OR 97217, USA

Elliott Bourgeois | Assistant Estimator | (503) 283-6712 | ebourgeois@andersen-const.com

SUBMIT ONLINE

LINE ITEMS

Description	Quantity	Unit Cost	Total Cost
DEMO OF 1916 BOILER HOUSE & 1953 SCIENCE WING:			
* Safe-off at Structures to be Demolished			$
* Safe-off for Interior Demo at Structures to Remain			$
* Trade Permits			$
* Design Fees			$
* General Conditions (See Cost Inclusions Matrix Tab)			$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)			$
* Overhead & Profit			$
* Add Performance and Payment Bond			$
DEMO OF 1918 SOUTH SHOP WING:			
* Safe-off at Structures to be Demolished			$
* Safe-off for Interior Demo at Structures to Remain			$
* Trade Permits			$
* Design Fees			$
* General Conditions (See Cost Inclusions Matrix Tab)			$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)			$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Overhead & Profit	$
* Add Performance and Payment Bond	$

DEMO OF 1953 AUTOMOTIVE BUILDING:

* Safe-off at Structures to be Demolishes	$
* Safe-off for Interior Demo at Structures to Remain	$
* Trade Permits	$
* Design Fees	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING A - 1930 AUDITORIUM BUILDING:

* D4010 West Systems	$
* D4010 Dry Systems	$
* Trenching & Backfill	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Trade Permits	$
* Design Fees	$
* General Conditions	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Add Performance and Payment Bond	$

BUILDING B - 1991 LIBRARY BUILDING:

* D4010 Wet Systems	$
* D4010 Dry Systems	$
* Trenching and Backfill	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Trade Permits	$
* Design Fees	$
* General Conditions	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING C - NEW NORTH WING W/ SALVAGED 1917 HISTORIC WALL:

* D4010 Wet Systems	$
* D4010 Dry Systems	$
* Trencing and Backfill	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Trade Permits	$
* Design Fees	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* General Conditions	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING D - 1917 FOUNDRY BUILDING:

* D4010 Wet Systems	$
* D4010 Dry Systems	$
* Trenching and Backfill	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Trade Permits	$
* Design Fees	$
* General Conditions	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING E - 1916 MAIN BUILDING:

* D4010 Wet Systems	$
* D4010 Dry Systems	$
* Trenching and Backfill	$
* Seismic Bracing	$
* Firestopping	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Insulation	$
* Trade Permits	$
* Design Fees	$
* General Conditions	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING F - NEW COMMONS BUILDING:

* D4010 Wet Systems	$
* D4010 Dry Systems	$
* Trenching and Backfill	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Trade Permits	$
* Design Fees	$
* General Conditions	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING G1 - 1925 AUX GYM BUILDING:

* D4010 Wet Systems	$
* D4010 Dry Systems	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Trenching and Backfill	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Trade Permits	$
* Design Fees	$
* General Conditions	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING G2 - 1964 MAIN GYM BUILDING:

* D4010 Wet Systems	$
* D4010 Dry Systems	$
* Trenching and Backfill	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Trade Permits	$
* Design Fees	$
* General Conditions	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

BUILDING H - NEW SOUTH SHOP BUILDING:

* D4010 Wet Systems	$
* D4010 Dry Systems	$
* Trenching and Backfill	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Trade Permits	$
* Design Fees	$
* General Conditions	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING I - 1992 KBPS BUILDING:

* D4010 Wet Systems	$
* D4010 Dry Systems	$
* Trenching and Backfill	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Trade Permits	$
* Design Fees	$
* General Conditions	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

SITEWORK - ADA RAMP - BUCKMAN IMPROVEMENTS:

* Trade Permits	$
* Design Fees	$
* General Conditions	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

SITEWORK - ON SITE IMPROVEMENTS (WITHING BENSON PROPERTY LINE):

* Trade Permits	$
* Design Fees	$
* General Conditions	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

SITEWORK - ROW - RIGHT-OF-WAY IMPROVEMENTS:

* Trade Permits	$
* Design Fees	$
* General Conditions	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Overhead & Profit	$
* Add Performance and Payment Bond	$
Base Bid	**$0.00**

INCLUSIONS

Mark "yes" to all yes/no questions »

GENERAL ITEMS:

* The intent of this bid package is to contract with to assist with design and procurement of the scope of work described above. A limited notice to proceed for Preconstruction Services and/or design (as applies) will be issued, until the GMP contract is in place with the Owner-anticipated May/June 2021. Include breakdown on bid form for Preconstruction and/or Design (as applies) only, this amount will become both the initial contract value and the value that would be billed if project was canceled for any reason.	○ Yes ○ No
* This scope of work description is intended to be indicative of the work to be performed but is not intended to describe all work necessary for a complete job. It is intended that, except as specifically provided herein, there shall be no change orders for any work or features that could be reasonably inferred to be required from the Contract Documents. If any of these instructions are contradictory to the manufacturers' recommendations or violates any code, industry standard, or good practice, it is the responsibility of the Subcontractor to bring this to the attention of the Contractor prior to starting any Scope of Work. Subcontractor is responsible to provide all design, materials, labor, supervision, tools, fasteners, adhesives, escalation and equipment necessary for a complete scope of work in strict accordance with Andersen Bid Documents, approved plans and specifications, and to bring to the Contractors attention any substantive work missing from this description.	○ Yes ○ No
* Include Preconstruction Requirements as outlined on Preconstruction Service Requirements scoping, and project schedule for a general idea of project design & construction timing that is planned at this time.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* RFP Estimate should include all information shown on project documents and narratives issued by Bassetti & subconsultants. Additionally, include all requirements in PPS Design Standards, unless noted on Deviations from PPS Standards dated 8/19/19.	○ Yes	○ No
* Include BIM Requirements as outlined in Project Conditions, Attachment 5.6: BIM Execution Plan	○ Yes	○ No
* Costs of all applicable trade permits, fees, and licenses (other than general building permit) are provided by this Subcontractor. Includes cost of plan check fees, if applicable.	○ Yes	○ No
* Provide all design-build/engineered framing, seismic bracing, anchoring design, engineering & materials required to support this system, including, but not limited to beams, posts, blocking, hangers, I-joists, plywood, etc. This includes adjustment of floor joist layout for plumbing, electrical, HVAC shafts, and fire sprinkler needs. For existing building assumptions, refer to drawings marked "Record Drawings, for reference Only." If information is not defined on this set of drawings, facility is available for bidder walk-thru for some as built confirmation. Additional information may be available via select demolition depending on school schedule while occupied until June 2021, or during demolition defined in the project schedule. Include coordination of locations and special inspection of anchors.	○ Yes	○ No
* Subcontractor shall provide anchors to secure equipment or piping. Cast in anchors will be utilized as needed for new work, and all anchors are to be submitted on and approved by the Structural Engineer. In slab coordination of embedded items will need to be coordinated with other MEP trades, Fireproofing Subcontractor, and Concrete Subcontractor. There will be multiple mobilizations required to install slab inserts at all new slabs being poured at the various buildings on the GHS campus.	○ Yes	○ No
* Note that depending on the final design of the construction documents, seismic / expansion joints may be required at the junction of some of the structures. Contractor shall provide the required expansion and contraction joints in the system as required by code or AHJ.	○ Yes	○ No
* Contractor is responsible to notify Andersen / Colas when Architectural review is required at various stages of construction as outlined in the spec.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Any work in crawl space area will require special training. Refer to Project Conditions/Safety for additional information regarding confined space/potential hazardous materials (asbestos) in this area & training requirements. Include all costs for appropriate training and PPE in this scope of work.	○ Yes ○ No
* Includes all necessary coordination with other trades. Every effort will be made to conceal the piping, cabling, etc. within walls or soffits to limit the amount of visible MEP items.	○ Yes ○ No
* Subcontractor shall provide access panels as needed for access to this scope of work, to be installed by drywall contractor, this includes fire rated panels where required in rated assemblies.	○ Yes ○ No
* Subcontractor to furnish and install any required backing, miscellaneous embedments, hangers or supports necessary for support of Subcontractors materials or equipment.	○ Yes ○ No
* Includes all work required for mock-ups listed in the specifications/front end documents. Assume 1 Corridor Mock up and 1 Classroom mock up to be built in place for review/coordination (as early as feasible in the project).	○ Yes ○ No
* Provide all required videotaped training of the Owner's personnel in location, function, control and emergency procedures for all fire protection systems and the preventive and periodic maintenance, and emergency repair procedures. The time and location of this training shall be at the sole discretion of the Owner. In addition, provide an approximate thirty (30) minute video of all system, maintenance and operation. Provide a sign-up sheet to the Owner / Contractor of personnel that attended training.	○ Yes ○ No
* A standard warranty as provided with warranty procedures as described in the contract documents. It is specifically noted and agreed that any equipment running before the date of acceptance shall not start the warranty period. Only the receipt of the occupancy permit and substantial completion certificate(s) shall start the warranty period. Includes the Letter of Conformance when all work is complete. Certain specifications require more that 1 year warranty, provide warranties that meet or exceed requirements in specs.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Furnish and install all sleeves required in CMU and/or concrete. If sleeves required in the basement walls, include in your pricing for core drilling and link seal of piping through walls. Note that all link seals are to be installed from the inside face of any exterior foundation walls, so that they can be tightened up over time.	○ Yes	○ No
* Provide all required fire caulking / safing necessary to achieve cover approval from the appropriate inspection agencies fire sprinkler work. Include submittals for fire caulking / safing indicating the methods to be used at various sections of the structure. Fire caulking and safing to be provided in Andersen in accordance with the plans and specifications and governing authorities. Fire caulking at exposed concrete or non painted CMU wall areas shall be gray in color. Subcontractors will agree on one manufacturer to be used for the entire project by each trade.	○ Yes	○ No
* The Subcontractor shall provide sealant around work which passes through cored holes, sleeves, framed, or blocked-out openings, drywall, floors, roofs, exterior walls, etc., in Andersen with local codes and specification requirements. Subcontractor shall provide all caulking, fire safing, flashings, counter flashings putty pads or other materials required for sealing their own penetrations. This work shall ensure prevention from the passage of smoke, gas, and flame between wall and floors and leaking water at waterproof membranes, flashing and roofing. Fire caulking work shall be included within the rough-in schedule for each floor.	○ Yes	○ No
* Penetrations in slab and shear walls are allowed only within the restrictions of the Structural Engineer's design and review / approval.	○ Yes	○ No
* All drilling, boxing, blocking etc. required for this work is to be completed by this Subcontractor. No cutting of structural members shall be allowed without written approval from the Superintendent. The repair cost for any damage caused by unapproved alterations to any part of the structure shall be deducted from contract amount.	○ Yes	○ No
* Coordinate the location of all items with architectural and structural features (including trim, columns, tile, appliances, cabinets, mirrors, etc.). Any items installed that will not allow the installation of designed features will be corrected at no additional cost.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Provide all required hoisting for your scope of work. Andersen will not have a crane or forklift on site for subcontractor use. Provide unloading of own material. No long term stock piling of material on site due to limitation of space. Short term storage to be approved by Andersen supervision upon request.	○ Yes	○ No
* Provide all acoustic, seismic and vibrations control as indicated in the project documents, governing authorities or as normally required for a complete system.	○ Yes	○ No
* Address in your proposal the method for this scope of work/system to remain operational before & after demolition is complete. Include costs to install temporary isolation valves if necessary so that buildings and individual "sectors" can be isolated for shut off independently. Coordinate work as necessary with Demolition/Abatement contractors and/or local utility companies. It is intended to have utilities operational during the entire project construction. Some buildings may be completed before other buildings and may need temporary utility feeds. Include the following components in your proposal. Coordinate with local Fire Dept., PPS, Demo & Abatement contractors to facilitate this goal. Include new system coverage as early as possible. Include all costs to cut, cap, drain, etc. to prepare system for demolition. If your intent is to reuse any part of the existing system, please indicate which components. Include removal and salvage of items related to this system.	○ Yes	○ No
* a. Main Building (Sectors A, B, E, G1, G2, D, I) Isolated from Auditorium-Sector A for some of the work	○ Yes	○ No
* b. Demolition & Construction of New Sectors C, F, H	○ Yes	○ No
* c. Demolition of existing Auto shop	○ Yes	○ No
* d. Relocation of Fire Line (if required) by Civil Contractor	○ Yes	○ No
* e. Maintaining Service with Existing/New Hydrants as pertains to your scope of work.	○ Yes	○ No
* f. Maintaining Temp Power, Gas, Water, Waste as pertains to your scope of work	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Refer to Owner Salvage Listing for all items that are required to be salvaged on this project. Perform Salvage work for same items that are included in New work to be removed, packaged, and transferred to a storage location within 25 miles of jobsite.	○ Yes ○ No
* It is assumed that the scope of work for demolition and new construction for the Utility Trench(es) will be scoped with typical 5' rule for utilities by Plumbing, Waste, Fire. Assume Civil Contractor will install new utility trench and/or extensions if required. Exception: Electrical is assumed to be located in a separate utility trench (if not already indicated as direct bury) and will be completely furnished & installed (trench, conduit, wiring, etc.) by the electrical contractor if required.	○ Yes ○ No
* Be responsible for the start-up and commissioning of the fire protection system. Attend weekly commissioning coordination meetings, and complete all required start-up and commissioning test forms as required by the Commissioning Agency. Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* Include all slab on grade demolition/excavation, and existing wall penetrations as needed to facilitate work included in this subcontract.	○ Yes ○ No
* Escalation: refer to RFP Instructions/Budget Breakdown form for price escalation requirements.	○ Yes ○ No
* Include all requirements to safely handle lead/lead content shall be included in this scope of work, and performed by this contractor. Assume all existing surfaces include lead contaminates. A separate abatement contractor will not be hired to abate lead.	○ Yes ○ No
* Coordinate work, including layout for work to be performed by others regarding Asbestos abatement (must be performed by Abatement contractor).	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Incudes all required excavation and backfill for the plumbing underground scope of work for the remaining work on site drawings (within 5' of building) and for work under slab on grade. The slab on grade will be removed by others, trenching & piping placement is included in this scope of work, and includes layout of plumbing under slab utilities, including staking and pot-hole verifications.	○ Yes ○ No
* Provide line and grade for own work from grid lines and elevation bench marks provided by others.	○ Yes ○ No
* Include all requirements pertaining to this scope of work as indicated on LEED Score Card	○ Yes ○ No
* Price to include all welding required for your scope of work including protection of other trades work.	○ Yes ○ No
* Review scope of work below regarding temporary services to facilitate demolition and/or construction operations (trailer area and onsite requirements). Include all work, including planning, permitting, etc. for items that are temporary in nature to facilitate project. If design is required solely for temporary items, include in this scope of work.	○ Yes ○ No
* Portland Public School Standards have been provided for reference only. Include a scoping letter that states that your bid complies with every item in the PPS standards, and if not, provide a marked up version of the PPS standards explaining requested changes to match bid.	○ Yes ○ No
* It is understood that this project may exceed code minimum. If bidder would like to submit Value Engineering to provide code minimum, ONLY, specify item in spec/PPS standards and deviation that is proposed to reach code minimum ONLY.	○ Yes ○ No
* Provide all identification markers, labels, tags and related signage per the contract documents and local code/AHJ.	○ Yes ○ No
* Coordinate with electrical contractor/designers for all power requirements related to your scope of work. Any changes caused by this subcontractor which affects the scope of the electrical firm will be the responsibility of this subcontractor.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Coordinate the location of all items included in your scope of work with architectural and structural features (including trim, white boards, misc. wall mounted items, etc.). Any items installed that will not allow the installation of designed features will be corrected at no extra cost, provided that these design features were apparent at the time of installation.	○ Yes	○ No
* Provide all testing, sterilization and certification of all systems as required by contract documents or as required by governing authorities.	○ Yes	○ No
* Andersen will provide egress lighting (via electrical subcontractor scope), each contractor is responsible for their own task lighting.	○ Yes	○ No
* Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes	○ No
* Subcontractor shall take field measurements of tight or congested areas prior to fabrication of materials. Modifications to the Subcontractor's work due to the Subcontractor's failure to field measure these key areas will be at the Subcontractor's expense. The use of the BIM coordination plan will be used to the greatest extent possible, however, due to timing of the Existing Conditions Building Scan, and incorporation into Revit, some items may require field verification to continue design/coordination without the scan fully available/incorporated.	○ Yes	○ No

SPECIFIC ITEMS:

* Provide all required labor, material, equipment, wiring, and devices for the Fire Protection System as described in Bid Package 21-00 Specifications. Includes all design, drawings, and start-up for a complete, functioning system	○ Yes	○ No
* Subcontractor shall provide design/build services for the entire Fire Protection scope. This includes but is not limited to drawings, specifications, calculations, engineering, seismic design, material supply, installation, testing, and commissioning for a complete fire protection system. Systems to conform with current code, AHJ, and NFPA 13 .	○ Yes	○ No

PROVIDE COMPLETE SYSTEM, INCLUDING BUT NOT LIMITED TO:

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Flow meters/flow switches	○ Yes	○ No
* Waterflow indicators (Post Indicator Valves with FA switch)	○ Yes	○ No
* Pressure switches	○ Yes	○ No
* Air compressors	○ Yes	○ No
* Butterfly control valves and tamper switches	○ Yes	○ No
* Butterfly floor control valves with tamper switches (at wet standpipe)	○ Yes	○ No
* Jockey pump and controller	○ Yes	○ No
* Transfer switches	○ Yes	○ No
* Dry pipe values with trim	○ Yes	○ No
* Roof manifolds with hose valves	○ Yes	○ No
* Double detector check valve assembly inside the building	○ Yes	○ No
* All alarm devices related to your system, including the 10 inch electric bell	○ Yes	○ No
* Fire Department valve at stairs	○ Yes	○ No
* Fire Department Connections and/or modifications to existing as required	○ Yes	○ No
* Testing (including off-hours if required)	○ Yes	○ No

PROVIDE ALL PIPING, INCLUDING PIPING:

* At wet system	○ Yes	○ No
* At dry system (if needed)	○ Yes	○ No
* Standpipes and risers	○ Yes	○ No
* Provide new backflow device if required, including testing of backflow device.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* The code requirement is for Class II standpipes at the auditorium is being appealed. Include Class II standpipes as required for the Auditorium. Class II standpipes to be supplied by the wet fire sprinkler system. Pending appeal, Class II design pressure to be provided by responding apparatus via the FDC. Coordinate location of Class II valves with Architect and Andersen/Colas. Assume no standpipes in the stairs since not required unless the highest occupied floor is over 30' above grade.	○ Yes ○ No
* Furnish and install all sprinkler heads and escutcheons. Includes semi recessed heads at all areas and head centered both ways if in a ACT. Unless noted otherwise, plan to center sprinkler heads both ways in ACT ceilings, and coordinate locations of sprinkler heads with other utilities in ceilings.	○ Yes ○ No
* Provide all Material and Test reports for materials used, and including fire pump acceptance test data reports as required.	○ Yes ○ No
* Subcontractor shall provide all system drainage, as required by code and per specifications, and at low point areas where large amounts of water can become trapped.	○ Yes ○ No
* Includes all work related to underground supply main to five feet outside building. Coordinate with site underground contractor. Subcontractor shall also provide riser base connection piping from the outside wall to the riser on the inside of the building, including required testing of this service line in a timely manner. When connecting to existing buried piping, field verify existing conditions of pipe and pipe sizes, notify Andersen of any discrepancies. Verify with the AHJ whether existing piping needs to be flush and bag tested before connecting new piping. Perform testing as required by the AHJ, and provide Andersen / Colas with documentation of such tests. Provide any thrust blocks that may be required for underground piping to risers within the building footprint.	○ Yes ○ No
* Provide all system labeling and signage required by code and AHJ.	○ Yes ○ No
* Scope includes furnish and install of heat trace and/or dry system as required on sprinkler piping. Plumbing piping and mechanical piping trace by others.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* All exposed piping (black steel) and fittings to be clean and free of rust and oil to receive paint. Provide adequate protection of slabs to avoid staining of work surfaces due to pipe cutting/this scope of work.	○ Yes	○ No
* Provide nail plates at all locations where pipe can be damaged by screws or nails (i.e., drywallers, carpenters, etc.) and/or required by code/AHJ.	○ Yes	○ No
* Provide all testing and certification of all systems as required by contract documents or by governing authorities. Includes periodic review with local fire marshal or AHJ, and coordination of flow testing for each building.	○ Yes	○ No
* Work with all trades to coordinate walls and soffits locations shown to ensure all work is located within walls or chases. Pressure test all piping that is going to be concealed within soffits or walls prior to cover finishes.	○ Yes	○ No
* Address in your proposal the method for fire protection at covered balconies and canopies, as well as the bridge overhangs, bike storage, etc.	○ Yes	○ No

GENERAL:

* Temporary Facilities are currently under development, a general list of requirements, based on a similar project is provided below to assist with budgeting process. MEP trades will assist in developing a final temp utility plan for the project. Each trade will be required to issue a narrative and drawing to demonstrate plan development and finalization. See attached Temporary Utility Service Assumptions Matrix and plan for general information/locations.	○ Yes	○ No
* In preparation of Demolition work starting Summer 2021, all trades will be requested to provide a plan for PREP work to occur during summer of 2020 to reduce the amount of time after building is vacated in summer 2021 to "make safe for demolition" activities completion. This early work will be issued as an early work authorization prior to GMP.	○ Yes	○ No
* All labor, supervision, materials, tools, equipment, fasteners, and adhesives as required to furnish install a complete system as outlined in the perspective bid package in accordance with all State Codes, Local Codes, NSC standards and jurisdictional codes & requirements, and in accordance with the contract documents.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Include all trade specific permits.	◯ Yes	◯ No
* Inspect and test each service before placing temporary services in use. Arrange for required inspections and tests by governing authorities and obtain required certifications and permits for use. Inspect the power supply system from incoming gear to the spider boxes once a month. Report to Andersen and defects and results of monthly inspections.	◯ Yes	◯ No
* Operate temporary services in a safe and efficient manner. Do not overload temporary services and facilities and do not let them interfere with the progress of work.	◯ Yes	◯ No
* Should services of an independent engineer be required to survey existing and or temporary services, cost shall be included by contractor. Do not allow hazardous conditions to develop or persist at the site.	◯ Yes	◯ No

TEMPORARY UTILITIES:

* Engage local utility companies to install temporary service to project or to make connections to existing service.	◯ Yes	◯ No
* Arrange with companies, Owner, and Andersen for an acceptable time for service interruptions, where necessary, to make connections for temporary services.	◯ Yes	◯ No
* Maintain service to Radio Station (Building I) to the greatest extent possible. Coordinate shutdowns as required.	◯ Yes	◯ No

GENERAL ACKNOWLEDGMENTS

Mark "yes" to all yes/no questions »

BUDGET SUMMARY (DIRECT COST SUBTOTAL OF EACH BUILDING FROM ABOVE):

* Demo of 1916 Boiler House & 1953 Science Wing (Safe-Off Only)	$
* Demo of 1918 South Shop Wing (Safe-Off Only)	$
* Demo of 1953 Automotive Building (Safe-Off Only)	$
* Building A - 1930 Auditorium Building	$
* Building B - 1991 Library Building	$
* Building C - New North Wing w/ Salvaged 1917 Historic Wall	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Building D - 1917 Foundry Building	$
* Building E - 1916 Main Building	$
* Building F - New Commons Building	$
* Building G1 - 1925 Aux Gym Building	$
* Building G2 - 1964 Main Gym Building	$
* Building H - New South Shop Building	$
* Building I - 1992 KBPS Building	$
* Sitework - ADA Ramp - Buckman Improvements	$
* Sitework - On-Site Improvements (within Benson Property Line)	$
* Sitework - ROW - Right-of-Way Improvements	$

SUMMARY INDIRECTS:

* Overhead & Profit Total All Buildings & Site Categories	$
* Preconstruction Total All Buildings & Site Categories	$
* BIM - During Preconstruction (up to 50% CD) Total all Buildings & Site Categories	$
* BIM - During Construction (after 50% CD) Total all Buildings & Site Categories	$
* Oregon Corporate Activities Tax	$
* OCIP Credit	$
* Performance & Payment Bond	$

ALL ANDERSEN RFP DOCUMENTS (SEE FILE 00 RFP TABLE OF CONTENTS FOR COMPLETE LISTING):

* 01 Request for Proposals & Instructions	◯ Yes ◯ No
* 02 Estimating Forms (Use Building Connected)	◯ Yes ◯ No
* 03 Scope of Work (Use Building Connected)	◯ Yes ◯ No
* 04 Document Listing	◯ Yes ◯ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* 05 Project Schedules	○ Yes	○ No
* 06 Subcontractor Prequalification Requirements	○ Yes	○ No
* 07 Subcontractor Agreement Form and All Exhibits (Key Exhibits Highlighted Below, See TOC for Complete Listing)	○ Yes	○ No
* 07 SC Exhibit 5 Site Specific Work Regulations	○ Yes	○ No
* 07 SC Exhibit 5.1 BHS PPS/Andersen Prime Agreement	○ Yes	○ No
* 07 SC Exhibit 5.2 Career Learning Requirements	○ Yes	○ No
* 07 SC Exhibit 5.3 Contractor Workforce Training & Hiring Program	○ Yes	○ No
* 07 SC Exhibit 5.4 Insurance Requirements - PPS OCIP Guidebook & Enrollment Forms - Sample	○ Yes	○ No
* 07 SC Exhibit 5.5 Insurance Requirements - PPS Non-OCIP - Sample	○ Yes	○ No
* 07 SC Exhibit 5.6 BIM Execution Plan	○ Yes	○ No
* 07 SC Exhibit 5.7 BOLI Wage Rates (July 2019 Booklet for Reference Only)	○ Yes	○ No
* 07 SC Exhibit 6 Site Logistics Plan	○ Yes	○ No
* 07 SC Exhibit A Safety Handbook 2018	○ Yes	○ No
* 07 SC Exhibit B Anti-Harassment Policy 2018	○ Yes	○ No
* 07 SC Exhibit C Safety Disciplinary Policy	○ Yes	○ No

DOCUMENT LISTING (SEE TABLE OF CONTENTS FOR FULL LISTING):

* Bassetti 100% Schematic Design Package dated August 19, 2019	○ Yes	○ No
* PPS Standards	○ Yes	○ No
* Record Drawings	○ Yes	○ No
* Environmental, Historical, and Diligence Reports	○ Yes	○ No

SUBMITTAL AND PRODUCT DELIVERY ARE IMPORTANT FACTORS IN CONTRACT AWARD; PROVIDE THE FOLLOWING SCHEDULE INFORMATION:

Submittals - list number of days required to complete	*input response here*

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

Product Data - list number of days required to complete	*input response here*
Shop Drawings - list number of days required to complete	*input response here*
Material Lead Time (after approved submittals) - list number of days	*input response here*
Date of Material / Equipment Delivery FOB jobsite	*input response here*

BOND INFORMATION

* Provide added cost for performance and payment bond	$

FEES AND MARKUPS

* Mark up on Own Work (Max 15% Labor, 10% Equipment, 10% Materials)	%
* Mark up on lower tier subs (Max 10% for $0-$5k, 5% for >$5k)	%

LABOR RATES

Foreman Standard Time	per hour	$
Foreman Time-and-a-Half	per hour	$
Foreman Double Time	per hour	$
Journeyman Standard Time	per hour	$
Journeyman Time-and-a-Half	per hour	$
Journeyman Double Time	per hour	$
Apprentice Standard Time	per hour	$
Apprentice Time-and-a-Half	per hour	$
Apprentice Double Time	per hour	$
Other Standard Time	per hour	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

Other Time-and-a-Half	per hour	$
Other Double Time	per hour	$

CERTIFICATIONS

* Is your firm a state certified Minority Business Enterprise?	○ Yes ○ No
* Is your firm a state certified Women-Owned Business Enterprise?	○ Yes ○ No
* Is your firm a state certified Emerging Small Business?	○ Yes ○ No
* Is your firm a state certified Disadvantaged Business Enterprise?	○ Yes ○ No
* Is your firm a state certified Disabled Veteran-Owned Business Enterprise?	○ Yes ○ No
* Is your firm union or non-union?	*input response here*

DISCLAIMERS AND CLARIFICATIONS

Andersen is an equal opportunity employer and strongly encourages the participation of emerging small business, women-owned, disadvantaged, disabled veterans and minority enterprises.

IN SUBMITTING THIS BID, YOUR FIRM AGREES TO THE FOLLOWING CONDITIONS:

To hold bid open for the number of days as specified in the Request for Bids and Bid Instruction

To accept the provisions of the Front End Documents and Divisions 00 and 01 specifications

To enter into and execute an unmodified Subcontract / Purchase Agreement if awarded on the basis of this bid

To accomplish the Work in accordance with the Contract Documents

To commence work under this contract immediately when directed and substantially complete the work within the durations shown on the project schedule

ATTACHMENTS

⊕ *upload files*

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

Bid package created on Sep 5, 2019 at 2:56 PDT

Andersen Construction Company

6712 N Cutter Cir, Portland, OR 97217, USA

Elliott Bourgeois | Assistant Estimator | (503) 283-6712 | ebourgeois@andersen-const.com

SUBMIT ONLINE

LINE ITEMS

Description	Quantity	Unit Cost	Total Cost
DEMO OF 1916 BOILER HOUSE & 1953 SCIENCE WING:			
* Safe-off at Structures to be Demolished			$
* Safe-Off for Interior Demo at Structures to Remain			$
* Trade Permits			$
* General Conditions (See Cost Inclusions Matrix Tab)			$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)			$
* Overhead & Profit			$
* Add Performance and Payment Bond			$
DEMO OF 1918 SOUTH SHOP WING:			
* Safe-Off at Structures to be Demolished			$
* Safe-Off for Interior Demo at Structures to Remain			$
* Trade Permits			$
* General Conditions (See Cost Inclusions Matrix Tab)			$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)			$
* Overhead & Profit			$
* Add performance and payment bond			$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

DEMO OF 1953 AUTOMOTIVE BUILDING:

* Safe-Off at Structures to be Demolished	$
* Safe-Off for Interior Demo at Structures to Remain	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

BUILDING A - 1930 AUDITORIUM BUILDING:

* D2010 Plumbing Fixtures - Purchase Only	$
* D2010 Plumbing Fixtures - Install Only (including receipt, inventory, coordination)	$
* D2020 Domestic Water Distribution	$
* D2020.1 Domestic Water Pumps	$
* D2020.2 Hot Water Heaters	$
* D2030 Sanitary Waste & Vent	$
* D2040 Storm Water System	$
* D2090 Compressed Air Systems	$
* D2090 Natural Gas	$
* D2090 Acid Waste	$
* D3040 Radon System	$
* G4010 Generator Fuel Fill	$
* Trenching & Backfill - Building	$
* Sawcutting	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Treatment	$
* Condensate Lines & Drains for Heat Pumps (Heat Pumps - Split Systems by HVAC)	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING B - 1991 LIBRARY BUILDING:

* D2010 Plumbing Fixtures - Purchase Only	$
* D2010 Plumbing Fixtures - Install Only (including receipt, inventory, coordination)	$
* D2020 Domestic Water Distribution	$
* D2020.1 Domestic Water Pumps	$
* D2020.2 Hot Water Heaters	$
* D2030 Sanitary Waste & Vent	$
* D2040 Storm Water System	$
* D2090 Compressed Air Systems	$
* D2090 Natural Gas	$
* D2090 Acid Waste	$
* D3040 Radon System	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* G4010 Generator Fuel Fill	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Treatment	$
* Condensate Lines & Drains for Heat Pumps (Heat Pumps - Split Systems by HVAC)	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING C - NEW NORTH WING W/ SALVAGED 1917 HISTORIC WALL:

* D2010 Plumbing Fixtures - Purchase Only	$
* D2010 Plumbing Fixtures - Install Only (including receipt, inventory, coordination)	$
* D2020 Domestic Water Distribution	$
* D2020.1 Domestic Water Pumps	$
* D2020.2 Hot Water Heaters	$
* D2030 Sanitary Waste & Vent	$
* D2040 Storm Water System	$
* D2090 Compressed Air Systems	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D2090 Natural Gas	$
* D2090 Acid Waste	$
* D3040 Radon System	$
* G4010 Generator Fuel Fill	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Treatment	$
* Condensate Lines & Drains for Heat Pumps (Heat Pumps - Split Systems by HVAC)	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING D - 1917 FOUNDRY BUILDING:

* D2010 Plumbing Fixtures - Purchase Only	$
* D2010 Plumbing Fixtures - Install Only (including receipt, inventory, coordination)	$
* D2020 Domestic Water Distribution	$
* D2020.1 Domestic Water Pumps	$
* D2020.2 Hot Water Heaters	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D2030 Sanitary Waste & Vent	$
* D2040 Storm Water System	$
* D2090 Compressed Air Systems	$
* D2090 Natural Gas	$
* D2090 Acid Waste	$
* D3040 Radon System	$
* G4010 Generator Fuel Fill	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Treatment	$
* Condensate Lines & Drains for Heat Pumps (Heat Pumps - Split Systems by HVAC)	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING E - 1916 MAIN BUILDING:

* D2010 Plumbing Fixtures - Purchase Only	$
* D2010 Plumbing Fixtures - Install Only (including receipt, inventory, coordination)	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D2020 Domestic Water Distribution	$
* D2020.1 Domestic Water Pumps	$
* D2020.2 Hot Water Heaters	$
* D2030 Sanitary Waste & Vent	$
* D2040 Storm Water System	$
* D2090 Compressed Air Systems	$
* D2090 Natural Gas	$
* D2090 Acid Waste	$
* D3040 Radon System	$
* G4010 Generator Fuel Fill	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Treatment	$
* Condensate Lines & Drains for Heat Pumps (Heat Pumps - Split Systems by HVAC)	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profits	$
* Add Performance and Payment Bond	$

BUILDING F - NEW COMMONS BUILDING:

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D2010 Plumbing Fixtures - Purchase Only	$
* D2010 Plumbing Fixtures - Install Only (including receipt, inventory, coordination)	$
* D2020 Domestic Water Distribution	$
* D2020.1 Domestic Water Pumps	$
* D2020.2 Hot Water Heaters	$
* D2030 Sanitary Waste & Vent	$
* D2040 Storm Water System	$
* D2090 Compressed Air Systems	$
* D2090 Natural Gas	$
* D2090 Acid Waste	$
* D3040 Radon System	$
* G4010 Generator Fuel Fill	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Treatment	$
* Condensate Lines & Drains for Heat Pumps (Heat Pumps - Split Systems by HVAC)	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING G1 - 1925 AUX GYM BUILDING:

* D2010 Plumbing Fixtures - Purchase Only	$
* D2010 Plumbing Fixtures - Install Only (including receipt, inventory, coordination)	$
* D2020 Domestic Water Distribution	$
* D2020.1 Domestic Water Pumps	$
* D2020.2 Hot Water Heaters	$
* D2030 Sanitary Waste & Vent	$
* D2040 Storm Water System	$
* D2090 Compressed Air Systems	$
* D2090 Natural Gas	$
* D2090 Acid Waste	$
* D3040 Radon System	$
* G4010 Generator Fuel Fill	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Treatment	$
* Condensate Lines & Drains for Heat Pumps (Heat Pumps - Split Systems by HVAC)	$
* Trade Permits	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING G2 - 1964 MAIN GYM BUILDING:

* D2010 Plumbing Fixtures - Purchase Only	$
* D2010 Plumbing Fixtures - Install Only (including receipt, inventory, coordination)	$
* D2020 Domestic Water Distribution	$
* D2020.1 Domestic Water Pumps	$
* D2020.2 Hot Water Heaters	$
* D2030 Sanitary Waste & Vent	$
* D2040 Storm Water System	$
* D2090 Compressed Air Systems	$
* D2090 Natural Gas	$
* D2090 Acid Waste	$
* D3040 Radon System	$
* G4010 Generator Fuel Fill	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Treatment	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Condensate Lines & Drains for Heat Pumps (Heat Pumps - Split Systems by HVAC)	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING H - NEW SOUTH SHOP BUILDING:

* D2010 Plumbing Fixtures - Purchase Only	$
* D2010 Plumbing Fixtures - Install Only (including receipt, inventory, coordination)	$
* D2020 Domestic Water Distribution	$
* D2020.1 Domestic Water Pumps	$
* D2020.2 Hot Water Heaters	$
* D2030 Sanitary Waste & Vent	$
* D2040 Storm Water System	$
* D2090 Compressed Air Systems	$
* D2090 Natural Gas	$
* D2090 Acid Waste	$
* D3040 Radon System	$
* G4010 Generator Fuel Fill	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Firestopping	$
* Insulation	$
* Chemical Treatment	$
* Condensate Lines & Drains for Heat Pumps (Heat Pumps - Split Systems by HVAC)	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and Payment Bond	$

BUILDING I - 1992 KBPS BUILDING:

* D2010 Plumbing Fixtures - Purchase Only	$
* D2010 Plumbing Fixtures - Install Only (including receipt, inventory, coordination)	$
* D2020 Domestic Water Distribution	$
* D2020.1 Domestic Water Pumps	$
* D2020.2 Hot Water Heaters	$
* D2030 Sanitary Waste & Vent	$
* D2040 Storm Water System	$
* D2090 Compressed Air Systems	$
* D2090 Natural Gas	$
* D2090 Acid Waste	$
* D3040 Radon System	$
* G4010 Generator Fuel Fill	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Treatment	$
* Condensate Lines & Drains for Heat Pumps (Heat Pumps - Split Systems by HVAC)	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

SITEWORK - ADA RAMP - BUCKMAN IMPROVEMENTS:

* G4010 Generator Fuel Fill	$
* Trenching & Backfill - Site (outside of building footprint)	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

SITEWORK - ON-SITE IMPROVEMENTS (WITHIN BENSON PROPERTY LINE):

* D2010 Plumbing Fixtures - Purchase Only	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D2010 Plumbing Fixtures - Install Only (including receipt, inventory, coordination)	$
* D2030.1 1500 Gallon Grease Interceptor	$
* D2040 Storm Water System	$
* D2040.1 Piping & Connection to Detention Vault (Vault by Civil)	$
* D2090 Natural Gas	$
* G4010 Generator Fuel Fill	$
* Temp Water Service (does not included monthly useage)	$
* Trenching & Backfill - Site (outside of building footprint)	$
* Sawcutting	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and Payment Bond	$

SITEWORK - ROW - RIGHT-OF-WAY IMPROVEMENTS:

* G4010 Generator Fuel Fill	$
* Trenching & Backfill - Site (outside of building footprint)	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

Base Bid **$0.00**

ALTERNATES

* Alt # 1 - Reference Booklet p.32, item 7 - Replace underground cast iron pipe with plastic PVC pipe. Per district standard, any underground plastic pipe must be provided with minimum 14 AWG copper tracer wire secured directly to the piping and detectable identifcation ribbon manufactured for direct burial. The tracer wire and detectable identifcation ribbon will be terminated above grade at building riser or other accepted location.	$
* Alt # 2 - Reference Booklet p.32, item 8 - Replace all vent piping with ABS pipe. Also replace all run outs to fxtures for domestic water system with PEX piping. Mains are all to remain copper. PEX supports will be provided per the manufacturer's recommendations. No exposed PEX piping will be allowed.	$
* Alt # 3 - Reference Booklet p32, item 11 - Replace all individual lavatories in shared restrooms with group fxtures. Group fxtures will be provided with stainless steel bowl and trim, sensor operated control valves with thermostatic temperature control, and all vandal-resistant options available.	$

INCLUSIONS

Mark "yes" to all yes/no questions »

* General Items:B23B8B3:B102	◯ Yes ◯ No
* The intent of this bid package is to contract with to assist with design and procurement of the scope of work described above. A limited notice to proceed for Preconstruction Services and/or design (as applies) will be issued, until the GMP contract is in place with the Owner-anticipated May/June 2021. Include breakdown on bid form for Preconstruction and/or Design (as applies) only, this amount will become both the initial contract value and the value that would be billed if project was canceled for any reason.	◯ Yes ◯ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* This scope of work description is intended to be indicative of the work to be performed but is not intended to describe all work necessary for a complete job. It is intended that, except as specifically provided herein, there shall be no change orders for any work or features that could be reasonably inferred to be required from the Contract Documents. If any of these instructions are contradictory to the manufacturers' recommendations or violates any code, industry standard, or good practice, it is the responsibility of the Subcontractor to bring this to the attention of the Contractor prior to starting any work. Subcontractor is responsible to provide all design, materials, labor, supervision, tools, fasteners, adhesives, escalation and equipment necessary to complete this scope of work in strict accordance with Andersen Bid Documents, approved plans and specifications, and to bring to the Contractors attention any substantive work missing from this description including but not limited to the following	◯ Yes	◯ No
* Include Preconstruction Requirements as outlined on Preconstruction Service Requirements scoping, and project schedule for a general idea of project design & construction timing that is planned at this time.	◯ Yes	◯ No
* RFP Estimate should include all information shown on project documents and narratives issued by Bassetti & subconsultants. Additionally, include all requirements in PPS Design Standards, unless noted on Deviations from PPS Standards dated 8/19/19.	◯ Yes	◯ No
* Include BIM Requirements as outlined in Project Conditions, Attachment 5.6: BIM Execution Plan	◯ Yes	◯ No
* Costs of all applicable trade permits, fees, and licenses (other than general building permit) are provided by this Subcontractor. Includes cost of plan check fees, if applicable.	◯ Yes	◯ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Provide all design-build/engineered framing, seismic bracing, anchoring design, engineering & materials required to support this system, including, but not limited to beams, posts, blocking, hangers, I-joists, plywood, etc. This includes adjustment of floor joist layout for plumbing, electrical, HVAC shafts, and fire sprinkler needs. For existing building assumptions, refer to drawings marked "Record Drawings, for reference Only." If information is not defined on this set of drawings, facility is available for bidder walk-thru for some as built confirmation. Additional information may be available via select demolition depending on school schedule while occupied until June 2021, or during demolition defined in the project schedule. Include coordination of locations and special inspection of anchors.	○ Yes ○ No
* Subcontractor shall provide anchors to secure equipment or piping. Cast in anchors will be utilized as needed for new work, and all anchors are to be submitted on and approved by the Structural Engineer. In slab coordination of embedded items will need to be coordinated with other MEP trades, Fireproofing Subcontractor, and Concrete Subcontractor. There will be multiple mobilizations required to install slab inserts at all new slabs being poured at the various buildings on the GHS campus.	○ Yes ○ No
* Note that depending on the final design of the construction documents, seismic / expansion joints may be required at the junction of some of the structures. Contractor shall provide the required expansion and contraction joints in the system as required by code or AHJ.	○ Yes ○ No
* Contractor is responsible to notify Andersen / Colas when Architectural review is required at various stages of construction as outlined in the spec.	○ Yes ○ No
* Any work in crawl space area will require special training. Refer to Project Conditions/Safety for additional information regarding confined space/potential hazardous materials (asbestos) in this area & training requirements. Include all costs for appropriate training and PPE in this scope of work.	○ Yes ○ No
* Includes all necessary coordination with other trades. Every effort will be made to conceal the piping, cabling, etc. within walls or soffits to limit the amount of visible MEP items.	○ Yes ○ No
* Subcontractor shall provide access panels as needed for access to this scope of work, to be installed by drywall contractor, this includes fire rated panels where required in rated assemblies.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Subcontractor to furnish and install any required backing, miscellaneous embedments, hangers or supports necessary for support of Subcontractors materials or equipment.	○ Yes	○ No
* Includes all work required for mock-ups listed in the specifications/front end documents. Assume 1 Corridor Mock up and 1 Classroom mock up to be built in place for review/coordination (as early as feasible in the project).	○ Yes	○ No
* Provide all required videotaped training of the Owner's personnel in location, function, control and emergency procedures for all fire protection systems and the preventive and periodic maintenance, and emergency repair procedures. The time and location of this training shall be at the sole discretion of the Owner. In addition, provide an approximate thirty (30) minute video of all system, maintenance and operation. Provide a sign-up sheet to the Owner / Contractor of personnel that attended training.	○ Yes	○ No
* A standard warranty as provided with warranty procedures as described in the contract documents. It is specifically noted and agreed that any equipment running before the date of acceptance shall not start the warranty period. Only the receipt of the occupancy permit and substantial completion certificate(s) shall start the warranty period. Includes the Letter of Conformance when all work is complete. Certain specifications require more that 1 year warranty, provide warranties that meet or exceed requirements in specs.	○ Yes	○ No
* Furnish and install all sleeves required in CMU and/or concrete. If sleeves required in the basement walls, include in your pricing for core drilling and link seal of piping through walls. Note that all link seals are to be installed from the inside face of any exterior foundation walls, so that they can be tightened up over time.	○ Yes	○ No
* Provide all required fire caulking / safing necessary to achieve cover approval from the appropriate inspection agencies fire sprinkler work. Include submittals for fire caulking / safing indicating the methods to be used at various sections of the structure. Fire caulking and safing to be provided in Andersen in accordance with the plans and specifications and governing authorities. Fire caulking at exposed concrete or non painted CMU wall areas shall be gray in color. Subcontractors will agree on one manufacturer to be used for the entire project by each trade.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* The Subcontractor shall provide sealant around work which passes through cored holes, sleeves, framed, or blocked-out openings, drywall, floors, roofs, exterior walls, etc., in Andersen with local codes and specification requirements. Subcontractor shall provide all caulking, fire safing, flashings, counter flashings putty pads or other materials required for sealing their own penetrations. This work shall ensure prevention from the passage of smoke, gas, and flame between wall and floors and leaking water at waterproof membranes, flashing and roofing. Fire caulking work shall be included within the rough-in schedule for each floor.	○ Yes	○ No
* Penetrations in slab and shear walls are allowed only within the restrictions of the Structural Engineer's design and review / approval.	○ Yes	○ No
* All drilling, boxing, blocking etc. required for this work is to be completed by this Subcontractor. No cutting of structural members shall be allowed without written approval from the Superintendent. The repair cost for any damage caused by unapproved alterations to any part of the structure shall be deducted from contract amount.	○ Yes	○ No
* Coordinate the location of all items with architectural and structural features (including trim, columns, tile, appliances, cabinets, mirrors, etc.). Any items installed that will not allow the installation of designed features will be corrected at no additional cost.	○ Yes	○ No
* Provide all required hoisting for your scope of work. Andersen will not have a crane or forklift on site for subcontractor use. Provide unloading of own material. No long term stock piling of material on site due to limitation of space. Short term storage to be approved by Andersen supervision upon request.	○ Yes	○ No
* Provide all acoustic, seismic and vibrations control as indicated in the project documents, governing authorities or as normally required for a complete system.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Address in your proposal the method for this scope of work/system to remain operational before & after demolition. Include costs to install temporary isolation valves if necessary so that buildings and individual "sectors" can be isolated for shut off independently. Coordinate work as necessary with Demolition/Abatement contractors and/or local utility companies. It is intended to have utilities operational during the entire project construction. Some buildings may be completed in advance of others and may need temporary utility feeds. Include the following components in your proposal. Coordinate with local Fire Dept., PPS, Demo & Abatement contractors to facilitate this goal. Include new system coverage as early as possible. Include all costs to cut, cap, drain, etc. to prepare system for demolition by others. If your intent is to reuse any part of the existing system, please indicate which components. Include removal and salvage of items related to this system.	○ Yes ○ No
* Refer to Owner Salvage Listing for all items that are required to be salvaged on this project. Perform Salvage work for same items that are included in New work to be removed, packaged, and transferred to a storage location within 25 miles of jobsite.	○ Yes ○ No
* It is assumed that the scope of work for demolition and new construction for the Utility Trench(es) will be scoped with typical 5' rule for utilities by Plumbing, Waste, Fire. Assume Civil Contractor will install new utility trench and/or extensions if required. Exception: Electrical is assumed to be located in a separate utility trench (if not already indicated as direct bury) and will be completely furnished & installed (trench, conduit, wiring, etc.) by the electrical contractor if required.	○ Yes ○ No
* Be responsible for the start-up and commissioning of the fire protection system. Attend weekly commissioning coordination meetings, and complete all required start-up and commissioning test forms as required by the Commissioning Agency. Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* Include all slab on grade demolition/excavation, and existing wall penetrations as needed to facilitate work included in this subcontract.	○ Yes ○ No
* Escalation: refer to RFP Instructions/Budget Breakdown form for price escalation requirements.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Include all requirements to safely handle lead/lead content shall be included in this scope of work, and performed by this contractor. Assume all existing surfaces include lead contaminates. A separate abatement contractor will not be hired to abate lead.	○ Yes	○ No
* Coordinate work, including layout for work to be performed by others regarding Asbestos abatement (must be performed by Abatement contractor).	○ Yes	○ No
* Incudes all required excavation and backfill for the plumbing underground scope of work for the remaining work on site drawings (within 5' of building) and for work under slab on grade. The slab on grade will be removed by others, trenching & piping placement is included in this scope of work, and includes layout of plumbing under slab utilities, including staking and pot-hole verifications.	○ Yes	○ No
* Provide line and grade for own work from grid lines and elevation bench marks provided by others.	○ Yes	○ No
* Include all requirements pertaining to this scope of work as indicated on LEED Score Card	○ Yes	○ No
* Price to include all welding required for your scope of work including protection of other trades work.	○ Yes	○ No
* Review scope of work below regarding temporary services to facilitate demolition and/or construction operations (trailer area and onsite requirements). Include all work, including planning, permitting, etc. for items that are temporary in nature to facilitate project. If design is required solely for temporary items, include in this scope of work.	○ Yes	○ No
* Portland Public School Standards have been provided for reference only. Include a scoping letter that states that your bid complies with every item in the PPS standards, and if not, provide a marked up version of the PPS standards explaining requested changes to match bid.	○ Yes	○ No
* It is understood that this project may exceed code minimum. If bidder would like to submit Value Engineering to provide code minimum, ONLY, specify item in spec/PPS standards and deviation that is proposed to reach code minimum ONLY.	○ Yes	○ No
* Provide all identification markers, labels, tags and related signage per the contract documents and local code/AHJ.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Coordinate with electrical contractor/designers for all power requirements related to your scope of work. Any changes caused by this subcontractor which affects the scope of the electrical firm will be the responsibility of this subcontractor.	○ Yes ○ No
* Coordinate the location of all items included in your scope of work with architectural and structural features (including trim, white boards, misc. wall mounted items, etc.). Any items installed that will not allow the installation of designed features will be corrected at no extra cost, provided that these design features were apparent at the time of installation.	○ Yes ○ No
* Provide all testing, sterilization and certification of all systems as required by contract documents or as required by governing authorities.	○ Yes ○ No
* Andersen will provide egress lighting (via electrical subcontractor scope), each contractor is responsible for their own task lighting.	○ Yes ○ No
* Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* Subcontractor shall take field measurements of tight or congested areas prior to fabrication of materials. Modifications to the Subcontractor's work due to the Subcontractor's failure to field measure these key areas will be at the Subcontractor's expense. The use of the BIM coordination plan will be used to the greatest extent possible, however, due to timing of the Existing Conditions Building Scan, and incorporation into Revit, some items may require field verification to continue design/coordination without the scan fully available/incorporated.	○ Yes ○ No

SPECIFIC ITEMS:

* Provide all required labor, material, equipment, wiring, and devices for the Plumbing System as described in Bid Package 21-00 Specifications. Includes all design, drawings, and start-up for a complete, functioning system. Please note: this scope of work is Design Assist.	○ Yes ○ No
* Provide all gas and water connections to all equipment shown on drawings, including but not limited to: HVAC equipment, Kitchen Equipment, Lab Equipment, etc.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Provide all testing, sterilization and certification of all systems as required by contract documents or as required by governing authorities.	○ Yes ○ No
* Laboratory Items: Install all connections to Science Sinks, Faucets, Fume Hoods, and all Science Equipment process piping connections provided and installed by the Lab Casework Vendor. Include all connections to water and waste lines (Inc. acid waste lines). Furnish and install all acid neutralization system items for a complete installation.	○ Yes ○ No
* Caulk all toilets, and sinks to adjacent surface (unless provided and installed by others) after installation. Clean all strainers, run all lines, i.e., sinks, etc. to assure their proper operation and to consider this project complete. Includes cleaning all clean-out covers and roof and floor drains and other systems as specified.	○ Yes ○ No
* All pipes and water service lines penetrating a finished surface within the finished occupiable drywalled spaces shall have escutcheons.	○ Yes ○ No
* Provide all insulation at domestic cold water mains and risers and all other locations required by specifications and code.	○ Yes ○ No
* Subcontractor shall coordinate with off-site utility subcontractor(s) and appropriate utility company(ies) for location of supply and tie-in, storm, water, gas and sanitary. This Subcontractor to coordinate with utility suppliers and the Civil Engineer and ensure that total scope of work is provided for complete installation and connection of utilities. Subcontractor is responsible for equipment as necessary to make tie-in to locations shown on civil drawings which may be more than 5' outside the building.	○ Yes ○ No
* Provide any thrust blocks, concrete embedment or other support or containment foundations for this scope of work if required or necessary	○ Yes ○ No
* Subcontractor to furnish and install the elevator pit sump pumps and related discharge piping as shown/per plumbing and elevator code requirements.	○ Yes ○ No
* Includes furnish, installation and setting (in coordination with the concrete subcontractor) of the trench drains inside of building and within 5' of building line. Other site area/trench drains will be provided by the Site work contractor.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Provide all drains, piping, flashing and necessary hardware for a watertight installation. Drain bodies shall be provided as required to provide a tight seal at the waterproof membrane material. Coordinate all work with concrete, roofing and waterproofing subcontractors.	○ Yes ○ No
* Provide a complete sanitary drainage system in accordance with the contract documents. Includes hub drains to accommodate condensate lines by HVAC contractor. Includes condensate drains from Pans provided by HVAC contractor.	○ Yes ○ No
* All waste, storm, water, and vent piping material shall be as specified in the contract documents. Subcontractor to comply with governing authority requirements regarding materials, installation methods and testing.	○ Yes ○ No
* Provide a complete hot and cold water supply system. Make connection to the water supply line installed underground by others as located on the civil plans. Provide all plumbing fixtures and hardware, recirculation pumps, storage tanks, and tankless water heaters, as required for a complete system installation.	○ Yes ○ No
* Provide layout in plumbing walls in restrooms, kitchens, and other congested plumbing walls during layout of walls for correct placement of studs. Coordinate with framer for installation of toilet and urinal support standards during framing, along with backing required for sinks, drinking fountains, etc. Contractor shall provide steel backing if backing is required to be greater than 18 ga. and provide nail-plates for plumbing lines that are run within stud framing. Coordinate all cores for this scope with Andersen / Colas to determine if cores are needed in magnesite floors. Cores in magnesite may require to be done by abatement contractor. Coordinate installation of all inserts and sleeves with concrete contractor for new decks and walls.	○ Yes ○ No
* Provide all check valves, backflow preventers, and other valves and assemblies as required and specified.	○ Yes ○ No
* Includes isolation valves at as shown on plans, or at minimum at each floor to assist with construction sequencing.	○ Yes ○ No
* Subcontractor shall provide anchors to secure equipment or piping. Include all engineering, deferred submittal costs and routing for attachments as required by AHJ.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* All pipes and water service lines penetrating a finished surface within the finished occupiable drywalled spaces shall have escutcheons, space piping to avoid escutcheon collisions. Coordinate pipes and drains exiting finished surfaces in cabinets and casework with casework shop drawings to avoid cabinet installation problems.	○ Yes	○ No
* Provide “frost protected” hose bibs on the building exterior, as shown on the drawings.	○ Yes	○ No
* Provide water supply source(s), point of connection, for landscape irrigation. Connection points to be coordinated with irrigation plans in the Contract Documents. Subcontractor is not responsible for any backflow or detector devices downstream of the point of connection. This contractor will be responsible for running the main distribution piping that is contained within the building to the general areas requiring irrigation only. Verify with irrigation and civil drawings.	○ Yes	○ No
* Provide all drains, piping, flashing and necessary hardware for a watertight installation. Drain bodies shall be provided as required to provide a tight seal at the waterproof membrane material. Coordinate all work with concrete, roofing and waterproofing subcontractors, and provide for adjustment in floor drains for sloping floors.	○ Yes	○ No
* Reduce the water pressure (if required) for all fixtures and equipment on the water supply system. Verify city water pressure as part of this scope of work. Send written report to Andersen-Colas for coordination with plumbing engineer.	○ Yes	○ No
* Provide fuel piping, exhaust piping, fuel fill and venting (if required) for emergency generator in accordance with contract documents and authorities having jurisdiction. Coordinate work with electrical contractor	○ Yes	○ No
* Provide all plumbing fixtures as shown in the documents. Refer to bid form for break out price of MATERIAL only for plumbing fixture package, work with design team to recommend changes, if necessary to provide best value for plumbing fixtures.	○ Yes	○ No
* Scope includes supply and installation of garbage disposals, if required at Kitchen equipment. Assume all other locations (not in kitchen) do not have Garbage Disposals	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Subcontractor to leave in place toilet seat cover cardboard shipping box over the installed seat to detour use by others	◯ Yes	◯ No
* Scope includes furnish and install of heat trace as required on plumbing piping. Fire sprinkler piping and mechanical piping trace by others.	◯ Yes	◯ No
* Include all new deck drains, overflow drains, etc. Sheet metal downspouts (new and existing) will be provided by others. Include connection to sheet metal downspout as required for a complete system. Coordinate layout and required coupling extensions for overflow drains with façade finishes. Provide openings in metal decking, including reinforced supports as per details at roof drains.	◯ Yes	◯ No
* Note that depending on the final design of the construction documents, seismic / expansion joints may be required at the junction of some of the structures. Contractor shall provide the required expansion and contraction joints in the system as required by code or AHJ.	◯ Yes	◯ No
* Specifications allow only 2 reviews for submittals and requires additional costs for additional reviews. Contractor to pay for any additional review costs.	◯ Yes	◯ No

TEMPORARY SERVICES:

REFER TO GENERAL ITEMS ABOVE, AND INCLUDE THE FOLLOWING SPECIFIC ITEMS LISTED BELOW:

* Provide an emergency temp. water shut off system, Flow Logic Emergency water shut off system will be an acceptable system to be installed on the building water mains down stream of the buildings RPBA in line to main building riser. The intent of the system is to monitor water pressure and flow off construction hours. In the event that there is a flow the system will detect pressure loss and shut the water line valve off to minimize water damage to buildings interior finishes. This will be required in all buildings	◯ Yes	◯ No
* Provide hose bibs and temporary water at grade for the purpose of misc. construction activities, including but not limited to: Masonry, concrete tool washing, etc.	◯ Yes	◯ No
* Include temporary means to drain the roof while new/existing downspouts, overflows, etc. are not operational	◯ Yes	◯ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Provide temporary plumbing of a water line to the staging area of the field offices. Include costs to supply and install including tapping city water line. Provide permit, meter, and backflow as required by City. This water will be used for 3 Office Trailer Connections hose bib, flush toilet trailer, and possibly another hose bib or flush toilet trailer. The hose bib is may be needed to fill the wheel wash at the construction entry. Provide water and waste for (2) clean hands trailers. Provide labor for potentially moving each temp. facility twice during construction as sequence work progresses for each building.	○ Yes ○ No
* Provide a temporary waste line from the flush toilets. Install this line as required by the City Plumbing Inspector, including the cost to excavate, core, and install into the MH. Include cost to remove the line at the end of the project, and patch the MH when finished. This SS drain line is to have a wye installed and capped for future use, in case a second flush toilet is installed, coordinate the location of the wye with Andersen / Colas.	○ Yes ○ No
* Temporary hose bibs will be needed throughout the campus. Existing domestic water may be available at various existing hose bibs for a time, but during construction a new domestic line will be installed, requiring temporary piping to supply water throughout. The contractor should assume that any existing hose bibs are not usable for construction, and new temporary water stations are needed. Temporary water should be run in Pex/Rovanco water lines, maintaining some slack in field locations for movement. It is anticipated that some existing water lines may be routed in existing steam tunnels, so whole buildings will loose their domestic water supply. Water stations should be figured as both water headers and hose bibs (minimum 3 hose bibs per header). Figure 4 water station/water headers at various location on campus. Provide approximately "5 hose bibs" around the exterior of the buildings. All water stations will need to have shut-off valves in order to shut down the lines in freezing weather.	○ Yes ○ No
* Disconnect various gas and water appliances as required from the Owners salvage list. This includes gas equipment in the Kitchen and at the Kilns. Also disconnect, cap, & salvage the natural gas shut-off valve in the boiler room, water heaters, and other equipment listed on the Owners salvage list in the boiler room.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Deck drains, slab drains, patio drains, area drains, roof drains, trench drains, rain leaders, and all piping necessary for a complete storm water system installation. Assume rain leaders are pipe (not sheet metal), and part of this scope of work. Provide labor to temporarily block and unplug drains for water test of membranes. Include all required overflow drains unless otherwise excluded in this scope of work. Provide temporary protection of drains for work of follow on trades.	○ Yes ○ No
* Include all costs to clean existing drain lines to be reused that are inside the building, at roofs. At the completion of work, include complete camera video and map demonstrating that drain flow is completely operational and clear. Scope of Plumbing includes work that is up to 5' of building line (consider light wells part of SITE Work). The scoping of the lines must include all flow out to 5' outside of building. If a blockage is found on an "existing to remain" location, notify Andersen-Colas immediately. This work shall be considered extra work. Light wells are considered site work, and not included in this scope of work.	○ Yes ○ No
* Include supplying, and setting all site trench drains, and connecting to sanitary system (by civil contractor)	○ Yes ○ No

EXCLUDED ITEMS:

* Hydronic Piping (part of HVAC scope)	○ Yes ○ No
* Sheet metal downspouts	○ Yes ○ No

GENERAL:

* Temporary Facilities are currently under development, a general list of requirements, based on a similar project is provided below to assist with budgeting process. MEP trades will assist in developing a final temp utility plan for the project. Each trade will be required to issue a narrative and drawing to demonstrate plan development and finalization. See attached Temporary Utility Service Assumptions Matrix and plan for general information/locations.	○ Yes ○ No
* In preparation of Demolition work starting Summer 2021, all trades will be requested to provide a plan for PREP work to occur during summer of 2020 to reduce the amount of time after building is vacated in summer 2021 to "make safe for demolition" activities completion. This early work will be issued as an early work authorization prior to GMP.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* All labor, supervision, materials, tools, equipment, fasteners, and adhesives as required to furnish install a complete system as outlined in the perspective bid package in accordance with all State Codes, Local Codes, NSC standards and jurisdictional codes & requirements, and in accordance with the contract documents.	○ Yes ○ No
* Include all trade specific permits.	○ Yes ○ No
* Inspect and test each service before placing temporary services in use. Arrange for required inspections and tests by governing authorities and obtain required certifications and permits for use. Inspect the power supply system from incoming gear to the spider boxes once a month. Report to Andersen and defects and results of monthly inspections.	○ Yes ○ No
* Operate temporary services in a safe and efficient manner. Do not overload temporary services and facilities and do not let them interfere with the progress of work.	○ Yes ○ No
* Should services of an independent engineer be required to survey existing and or temporary services, cost shall be included by contractor. Do not allow hazardous conditions to develop or persist at the site.	○ Yes ○ No

TEMPORARY UTILITIES:

* Engage local utility companies to install temporary service to project or to make connections to existing service.	○ Yes ○ No
* Arrange with companies, Owner, and Andersen for an acceptable time for service interruptions, where necessary, to make connections for temporary services.	○ Yes ○ No
* Maintain service to Radio Station (Building I) to the greatest extent possible. Coordinate shutdowns as required.	○ Yes ○ No

GENERAL ACKNOWLEDGMENTS

Mark "yes" to all yes/no questions »

BUDGET SUMMARY (DIRECT COST SUBTOTAL OF EACH BUILDING FROM ABOVE):

* Demo of 1916 Boiler House & 1953 Science Wing (Safe-Off Only)	$
* Demo of 1918 South Shop Wing (Safe-Off Only)	$
* Demo of 1953 Automotive Building (Safe-Off Only)	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Building A - 1930 Auditorium Building	$
* Building B - 1991 Library Building	$
* Building C - New North Wing w/ Salvaged 1917 Historic Wall	$
* Building D - 1917 Foundry Building	$
* Building E - 1916 Main Building	$
* Building F - New Commons Building	$
* Building G1 - 1925 Aux Gym Building	$
* Building G2 - 1964 Main Gym Building	$
* Building H - New South Shop Building	$
* Building I - 1992 KBPS Building	$
* Sitework - ADA Ramp - Buckman Improvements	$
* Sitework - On-Site Improvements (within Benson Property Line)	$
* Sitework - ROW - Right-of-Way Improvements	$

SUMMARY INDIRECTS:

* Overhead & Profit Total All Buildings & Site Categories	$
* Preconstruction Total All Buildings & Site Categories	$
* BIM - During Preconstruction (up to 50% CD) Total all Buildings & Site Categories	$
* BIM - During Construction (after 50% CD) Total all Buildings & Site Categories	$
* Oregon Corporate Activities Tax	$
* OCIP Credit	$
* Performance & Payment Bond	$

ALL ANDERSEN RFP DOCUMENTS (SEE FILE 00 RFP TABLE OF CONTENTS FOR COMPLETE LISTING):

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* 01 Request for Proposals & Instructions	○ Yes	○ No
* 02 Estimating Forms (Use Building Connected)	○ Yes	○ No
* 03 Scope of Work (Use Building Connected)	○ Yes	○ No
* 04 Document Listing	○ Yes	○ No
* 05 Project Schedules	○ Yes	○ No
* 06 Subcontractor Prequalification Requirements	○ Yes	○ No
* 07 Subcontractor Agreement Form and All Exhibits (Key Exhibits Highlighted Below, See TOC for Complete Listing)	○ Yes	○ No
* 07 SC Exhibit 5 Site Specific Work Regulations	○ Yes	○ No
* 07 SC Exhibit 5.1 BHS PPS/Andersen Prime Agreement	○ Yes	○ No
* 07 SC Exhibit 5.2 Career Learning Requirements	○ Yes	○ No
* 07 SC Exhibit 5.3 Contractor Workforce Training & Hiring Program	○ Yes	○ No
* 07 SC Exhibit 5.4 Insurance Requirements - PPS OCIP Guidebook & Enrollment Forms - Sample	○ Yes	○ No
* 07 SC Exhibit 5.5 Insurance Requirements - PPS Non-OCIP - Sample	○ Yes	○ No
* 07 SC Exhibit 5.6 BIM Execution Plan	○ Yes	○ No
* 07 SC Exhibit 5.7 BOLI Wage Rates (July 2019 Booklet for Reference Only)	○ Yes	○ No
* 07 SC Exhibit 6 Site Logistics Plan	○ Yes	○ No
* 07 SC Exhibit A Safety Handbook 2018	○ Yes	○ No
* 07 SC Exhibit B Anti-Harassment Policy 2018	○ Yes	○ No
* 07 SC Exhibit C Safety Disciplinary Policy	○ Yes	○ No

DOCUMENT LISTING (SEE TABLE OF CONTENTS FOR FULL LISTING):

* Bassetti 100% Schematic Design Package dated August 19, 2019	○ Yes	○ No
* PPS Standards	○ Yes	○ No
* Record Drawings	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Environmental, Historical, and Diligence Reports	◯ Yes ◯ No

SUBMITTAL AND PRODUCT DELIVERY ARE IMPORTANT FACTORS IN CONTRACT AWARD; PROVIDE THE FOLLOWING SCHEDULE INFORMATION:

Submittals - list number of days required to complete	*input response here*
Product Data - list number of days required to complete	*input response here*
Shop Drawings - list number of days required to complete	*input response here*
Material Lead Time (after approved submittals) - list number of days	*input response here*
Date of Material / Equipment Delivery FOB jobsite	*input response here*

BOND INFORMATION

* Provide added cost for performance and payment bond	$

FEES AND MARKUPS

* Mark up on Own Work (Max 15% Labor, 10% Equipment, 10% Materials)	%
* Mark up on lower tier subs (Max 10% for $0-$5k, 5% for >$5k)	%

LABOR RATES

Foreman Standard Time	per hour	$
Foreman Time-and-a-Half	per hour	$
Foreman Double Time	per hour	$
Journeyman Standard Time	per hour	$
Journeyman Time-and-a-Half	per hour	$
Journeyman Double Time	per hour	$
Apprentice Standard Time	per hour	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

Apprentice Time-and-a-Half	per hour	$
Apprentice Double Time	per hour	$
Other Standard Time	per hour	$
Other Time-and-a-Half	per hour	$
Other Double Time	per hour	$

CERTIFICATIONS

* Is your firm a state certified Minority Business Enterprise?	○ Yes	○ No
* Is your firm a state certified Women-Owned Business Enterprise?	○ Yes	○ No
* Is your firm a state certified Emerging Small Business?	○ Yes	○ No
* Is your firm a state certified Disadvantaged Business Enterprise?	○ Yes	○ No
* Is your firm a state certified Disabled Veteran-Owned Business Enterprise?	○ Yes	○ No
* Is your firm union or non-union?	*input response here*	

DISCLAIMERS AND CLARIFICATIONS

Andersen is an equal opportunity employer and strongly encourages the participation of emerging small business, women-owned, disadvantaged, disabled veterans and minority enterprises.

IN SUBMITTING THIS BID, YOUR FIRM AGREES TO THE FOLLOWING CONDITIONS:

To hold bid open for the number of days as specified in the Request for Bids and Bid Instruction

To accept the provisions of the Front End Documents and Divisions 00 and 01 specifications

To enter into and execute an unmodified Subcontract / Purchase Agreement if awarded on the basis of this bid

To accomplish the Work in accordance with the Contract Documents

To commence work under this contract immediately when directed and substantially complete the work within the durations shown on the project schedule

ATTACHMENTS

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

⊕ *upload files*

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

Bid package created on Sep 5, 2019 at 4:15 PDT

Andersen Construction Company

6712 N Cutter Cir, Portland, OR 97217, USA

Elliott Bourgeois | Assistant Estimator | (503) 283-6712 | ebourgeois@andersen-const.com

SUBMIT ONLINE

LINE ITEMS

Description	Quantity	Unit Cost	Total Cost
DEMO OF 1916 BOILER HOUSE & 1953 SCIENCE WING (SAFE-OFF ONLY):			
* Safe-Off at Structures to be Demolished			$
* Safe-Off for Interior Demo at Structures to Remain			$
* Trade Permits			$
* General Conditions (See Cost Inclusions Matrix Tab)			$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)			$
* Overhead & Profit			$
* Add Performance and Payment Bond			$
DEMO OF 1918 SOUTH SHOP WING (SAFE-OFF ONLY):			
* Safe-Off at Structures to be Demolished			$
* Safe-Off for Interior Demo at Structures to Remain			$
* Trade Permits			$
* General Conditions (See Cost Inclusions Matrix Tab)			$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)			$
* Overhead & Profit			$
* Add Performance and Payment Bond			$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

DEMO OF 1953 AUTOMOTIVE BUILDING (SAFE-OFF ONLY):

* Safe-Off at Structures to be Demolished	$
* Safe-Off for Interior Demo at Structures to Remain	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING A - 1930 AUDITORIUM BUILDING:

* D3020 Heating Water Boilers	$
* D3020.1 Heating Water Pumps	$
* D3030 Cooling Towers	$
* D3030 Chillers	$
* D3030 Condensed Water & Chilled Water Pumps	$
* D3030 Heat Pumps - Split Systems (condensate lines by plumbing)	$
* D3040 Dedicated Outside Air Systems - AHUs	$
* D3040 Variable Air Volume Systems - AHUs	$
* D3040 Make-Up Air Units	$
* D3040 Heating Water Piping	$
* D3040 Cooling Water Piping	$
* D3040 Refrigerant Piping	$
* D3040 General Exhaust	$
* D3040 Grease Exhaust	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3040 Automotive Exhaust	$
* D3040 Dust Collection Systems	$
* D3040 Fume & Heat Extraction Systems	$
* D3040.1 Science Fume Hoods (Hoods by Others, Exhaust by HVAC)	$
* D3040.2 Kilns (Kilns by Others, Exhaust by HVAC)	$
* D3040.3 Radon System (by Plumbing)	$
* D3040.4 Grilles, Registers, Diffusers, Louvers	$
* D3040.5 Fire Smoke Dampers	$
* D3040.6 Ductwork	$
* D3050 Fan Coil Units	$
* D3050 Chilled Beams	$
* D3050 Terminal Units	$
* D3050 Finned Tube Radiators	$
* D3050 Unit Heaters	$
* Rough-In / Conduit for Controls	$
* D3060 Electrical Metering	$
* D3060 DDC System	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Water Treatment	$
* Test & Balance	$
* Hoisting / Rigging	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING B - 1991 LIBRARY BUILDING:

* D3020 Heating Water Boilers	$
* D3020.1 Heating Water Pumps	$
* D3030 Cooling Towers	$
* D3030 Chillers	$
* D3030 Condensed Water & Chilled Water Pumps	$
* D3030 Heat Pumps - Split Systems (condensate lines by plumbing)	$
* D3040 Dedicated Outside Air Systems - AHUs	$
* D3040 Variable Air Volume Systems - AHUs	$
* D3040 Make-Up Air Units	$
* D3040 Heating Water Piping	$
* D3040 Cooling Water Piping	$
* D3040 Refrigerant Piping	$
* D3040 General Exhaust	$
* D3040 Grease Exhaust	$
* D3040 Automotive Exhaust	$
* D3040 Dust Collection Systems	$
* D3040 Fume & Heat Extraction Systems	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3040.1 Science Fume Hoods (Hoods by Others, Exhaust by HVAC)	$
* D3040.2 Kilns (Kilns by Others, Exhaust by HVAC)	$
* D3040.3 Radon System (by Plumbing)	$
* D3040.4 Grilles, Registers, Diffusers, Louvers	$
* D3040.5 Fire Smoke Dampers	$
* D3040.6 Ductwork	$
* D3050 Fan Coil Units	$
* D3050 Chilled Beams	$
* D3050 Terminal Units	$
* D3050 Finned Tube Radiators	$
* D3050 Unit Heaters	$
* Rough-In / Conduit for Controls	$
* D3060 Electrical Metering	$
* D3060 DDC System	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Water Treatment	$
* Test & Balance	$
* Hoisting / Rigging	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING C - NEW NORTH WING W/ SALVAGED 1917 HISTORIC WALL:

* D3020 Heating Water Boilers	$
* D3020.1 Heating Water Pumps	$
* D3030 Cooling Towers	$
* D3030 Chillers	$
* D3030 Condensed Water & Chilled Water Pumps	$
* D3030 Heat Pumps - Split Systems (condensate lines by plumbing)	$
* D3040 Dedicated Outside Air Systems - AHUs	$
* D3040 Variable Air Volume Systems - AHUs	$
* D3040 Make-Up Air Units	$
* D3040 Heating Water Piping	$
* D3040 Cooling Water Piping	$
* D3040 Refrigerant Piping	$
* D3040 General Exhaust	$
* D3040 Grease Exhaust	$
* D3040 Automotive Exhaust	$
* D3040 Dust Collection Systems	$
* D3040 Fume & Heat Extraction Systems	$
* D3040.1 Science Fume Hoods (Hoods by Others, Exhaust by HVAC)	$
* D3040.2 Kilns (Kilns by Others, Exhaust by HVAC)	$
* D3040.3 Radon System (by Plumbing)	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3040.4 Grilles, Registers, Diffusers, Louvers	$
* D3040.5 Fire Smoke Dampers	$
* D3040.6 Ductwork	$
* D3050 Fan Coil Units	$
* D3050 Chilled Beams	$
* D3050 Terminal Units	$
* D3050 Finned Tube Radiators	$
* D3050 Unit Heaters	$
* Rough-In / Conduit for Controls	$
* D3060 Electrical Metering	$
* D3060 DDC System	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Water Treatment	$
* Test & Balance	$
* Hoisting / Rigging	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING D - 1917 FOUNDRY BUILDING:

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3020 Heating Water Boilers	$
* D3020.1 Heating Water Pumps	$
* D3030 Cooling Towers	$
* D3030 Chillers	$
* D3030 Condensed Water & Chilled Water Pumps	$
* D3030 Heat Pumps - Split Systems (condensate lines by plumbing)	$
* D3040 Dedicated Outside Air Systems - AHUs	$
* D3040 Variable Air Volume Systems - AHUs	$
* D3040 Make-Up Air Units	$
* D3040 Heating Water Piping	$
* D3040 Cooling Water Piping	$
* D3040 Refrigerant Piping	$
* D3040 General Exhaust	$
* D3040 Grease Exhaust	$
* D3040 Automotive Exhaust	$
* D3040 Dust Collection Systems	$
* D3040 Fume & Heat Extraction Systems	$
* D3040.1 Science Fume Hoods (Hoods by Others, Exhaust by HVAC)	$
* D3040.2 Kilns (Kilns by Others, Exhaust by HVAC)	$
* D3040.3 Radon System (by Plumbing)	$
* D3040.4 Grilles, Registers, Diffusers, Louvers	$
* D3040.5 Fire Smoke Dampers	$
* D3040.6 Ductwork	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3050 Fan Coil Units	$
* D3050 Chilled Beams	$
* D3050 Terminal Units	$
* D3050 Finned Tube Radiators	$
* D3050 Unit Heaters	$
* Rough-In / Conduit for Controls	$
* D3060 Electrical Metering	$
* D3060 DDC System	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Water Treatment	$
* Test & Balance	$
* Hoisting / Rigging	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING E - 1916 MAIN BUILDING:

* D3020 Heating Water Boilers	$
* D3020.1 Heating Water Pumps	$
* D3030 Cooling Towers	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3030 Chillers	$
* D3030 Condensed Water & Chilled Water Pumps	$
* D3030 Heat Pumps - Split Systems (condensate lines by plumbing)	$
* D3040 Dedicated Outside Air Systems - AHUs	$
* D3040 Variable Air Volume Systems - AHUs	$
* D3040 Make-Up Air Units	$
* D3040 Heating Water Piping	$
* D3040 Cooling Water Piping	$
* D3040 Refrigerant Piping	$
* D3040 General Exhaust	$
* D3040 Grease Exhaust	$
* D3040 Automotive Exhaust	$
* D3040 Dust Collection Systems	$
* D3040 Fume & Heat Extraction Systems	$
* D3040.1 Science Fume Hoods (Hoods by Others, Exhaust by HVAC)	$
* D3040.2 Kilns (Kilns by Others, Exhaust by HVAC)	$
* D3040.3 Radon System (by Plumbing)	$
* D3040.4 Grilles, Registers, Diffusers, Louvers	$
* D3040.5 Fire Smoke Dampers	$
* D3040.6 Ductwork	$
* D3050 Fan Coil Units	$
* D3050 Chilled Beams	$
* D3050 Terminal Units	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3050 Finned Tube Radiators	$
* D3050 Unit Heaters	$
* Rough-In / Conduit for Controls	$
* D3060 Electrical Metering	$
* D3060 DDC System	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Water Treatment	$
* Test & Balance	$
* Hoisting / Rigging	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING F - NEW COMMONS BUILDING:

* D3020 Heating Water Boilers	$
* D3020.1 Heating Water Pumps	$
* D3030 Cooling Towers	$
* D3030 Chillers	$
* D3030 Condensed Water & Chilled Water Pumps	$
* D3030 Heat Pumps - Split Systems (condensate lines by plumbing)	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3040 Dedicated Outside Air Systems - AHUs	$
* D3040 Variable Air Volume Systems - AHUs	$
* D3040 Make-Up Air Units	$
* D3040 Heating Water Piping	$
* D3040 Cooling Water Piping	$
* D3040 Refrigerant Piping	$
* D3040 General Exhaust	$
* D3040 Grease Exhaust	$
* D3040 Automotive Exhaust	$
* D3040 Dust Collection Systems	$
* D3040 Fume & Heat Extraction Systems	$
* D3040.1 Science Fume Hoods (Hoods by Others, Exhaust by HVAC)	$
* D3040.2 Kilns (Kilns by Others, Exhaust by HVAC)	$
* D3040.3 Radon System (by Plumbing)	$
* D3040.4 Grilles, Registers, Diffusers, Louvers	$
* D3040.5 Fire Smoke Dampers	$
* D3040.6 Ductwork	$
* D3050 Fan Coil Units	$
* D3050 Chilled Beams	$
* D3050 Terminal Units	$
* D3050 Finned Tube Radiators	$
* D3050 Unit Heaters	$
* Rough-In / Conduit for Controls	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3060 Electrical Metering	$
* D3060 DDC System	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Water Treatment	$
* Test & Balance	$
* Hoisting / Rigging	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING G1 - 1925 AUX GYM BUILDING:

* D3020 Heating Water Boilers	$
* D3020.1 Heating Water Pumps	$
* D3030 Cooling Towers	$
* D3030 Chillers	$
* D3030 Condensed Water & Chilled Water Pumps	$
* D3030 Heat Pumps - Split Systems (condensate lines by plumbing)	$
* D3040 Dedicated Outside Air Systems - AHUs	$
* D3040 Variable Air Volume Systems - AHUs	$
* D3040 Make-Up Air Units	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3040 Heating Water Piping	$
* D3040 Cooling Water Piping	$
* D3040 Refrigerant Piping	$
* D3040 General Exhaust	$
* D3040 Grease Exhaust	$
* D3040 Automotive Exhaust	$
* D3040 Dust Collection Systems	$
* D3040 Fume & Heat Extraction Systems	$
* D3040.1 Science Fume Hoods (Hoods by Others, Exhaust by HVAC)	$
* D3040.2 Kilns (Kilns by Others, Exhaust by HVAC)	$
* D3040.3 Radon System (by Plumbing)	$
* D3040.4 Grilles, Registers, Diffusers, Louvers	$
* D3040.5 Fire Smoke Dampers	$
* D3040.6 Ductwork	$
* D3050 Fan Coil Units	$
* D3050 Chilled Beams	$
* D3050 Terminal Units	$
* D3050 Finned Tube Radiators	$
* D3050 Unit Heaters	$
* Rough-In / Conduit for Controls	$
* D3060 Electrical Metering	$
* D3060 DDC System	$
* Seismic Bracing	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Firestopping	$
* Insulation	$
* Chemical Water Treatment	$
* Test & Balance	$
* Hoisting / Rigging	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING G2 - 1964 MAIN GYM BUILDING:

* D3020 Heating Water Boilers	$
* D3020.1 Heating Water Pumps	$
* D3030 Cooling Towers	$
* D3030 Chillers	$
* D3030 Condensed Water & Chilled Water Pumps	$
* D3030 Heat Pumps - Split Systems (condensate lines by plumbing)	$
* D3040 Dedicated Outside Air Systems - AHUs	$
* D3040 Variable Air Volume Systems - AHUs	$
* D3040 Make-Up Air Units	$
* D3040 Heating Water Piping	$
* D3040 Cooling Water Piping	$
* D3040 Refrigerant Piping	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3040 General Exhaust	$
* D3040 Grease Exhaust	$
* D3040 Automotive Exhaust	$
* D3040 Dust Collection Systems	$
* D3040 Fume & Heat Extraction Systems	$
* D3040.1 Science Fume Hoods (Hoods by Others, Exhaust by HVAC)	$
* D3040.2 Kilns (Kilns by Others, Exhaust by HVAC)	$
* D3040.3 Radon System (by Plumbing)	$
* D3040.4 Grilles, Registers, Diffusers, Louvers	$
* D3040.5 Fire Smoke Dampers	$
* D3040.6 Ductwork	$
* D3050 Fan Coil Units	$
* D3050 Chilled Beams	$
* D3050 Terminal Units	$
* D3050 Finned Tube Radiators	$
* D3050 Unit Heaters	$
* Rough-In / Conduit for Controls	$
* D3060 Electrical Metering	$
* D3060 DDC System	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Water Treatment	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Test & Balance	$
* Hoisting / Rigging	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profits	$
* Add Performance and Payment Bond	$

BUILDING H - NEW SOUTH SHOP BUILDING:

* D3020 Heating Water Boilers	$
* D3020.1 Heating Water Pumps	$
* D3030 Cooling Towers	$
* D3030 Chillers	$
* D3030 Condensed Water & Chilled Water Pumps	$
* D3030 Heat Pumps - Split Systems (condensate lines by plumbing)	$
* D3040 Dedicated Outside Air Systems - AHUs	$
* D3040 Variable Air Volume Systems - AHUs	$
* D3040 Make-Up Air Units	$
* D3040 Heating Water Piping	$
* D3040 Cooling Water Piping	$
* D3040 Refrigerant Piping	$
* D3040 General Exhaust	$
* D3040 Grease Exhaust	$
* D3040 Automotive Exhaust	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3040 Dust Collection Systems	$
* D3040 Fume & Heat Extraction Systems	$
* D3040.1 Science Fume Hoods (Hoods by Others, Exhaust by HVAC)	$
* D3040.2 Kilns (Kilns by Others, Exhaust by HVAC)	$
* D3040.3 Radon System (by Plumbing)	$
* D3040.4 Grilles, Registers, Diffusers, Louvers	$
* D3040.5 Fire Smoke Dampers	$
* D3040.6 Ductwork	$
* D3050 Fan Coil Units	$
* D3050 Chilled Beams	$
* D3050 Terminal Units	$
* D3050 Finned Tube Radiators	$
* D3050 Unit Heaters	$
* Rough-In / Conduit for Controls	$
* D3060 Electrical Metering	$
* D3060 DDC System	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Water Treatment	$
* Test & Balance	$
* Hoisting / Rigging	$
* Trade Permits	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

BUILDING I - 1992 KBPS BUILDING:

* D3020 Heating Water Boilers	$
* D3020.1 Heating Water Pumps	$
* D3030 Cooling Towers	$
* D3030 Chillers	$
* D3030 Condensed Water & Chilled Water Pumps	$
* D3030 Heat Pumps - Split Systems (condensate lines by plumbing)	$
* D3040 Dedicated Outside Air Systems - AHUs	$
* D3040 Variable Air Volume Systems - AHUs	$
* D3040 Make-Up Air Units	$
* D3040 Heating Water Piping	$
* D3040 Cooling Water Piping	$
* D3040 Refrigerant Piping	$
* D3040 General Exhaust	$
* D3040 Grease Exhaust	$
* D3040 Automotive Exhaust	$
* D3040 Dust Collection Systems	$
* D3040 Fume & Heat Extraction Systems	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D3040.1 Science Fume Hoods (Hoods by Others, Exhaust by HVAC)	$
* D3040.2 Kilns (Kilns by Others, Exhaust by HVAC)	$
* D3040.3 Radon System (by Plumbing)	$
* D3040.4 Grilles, Registers, Diffusers, Louvers	$
* D3040.5 Fire Smoke Dampers	$
* D3040.6 Ductwork	$
* D3050 Fan Coil Units	$
* D3050 Chilled Beams	$
* D3050 Terminal Units	$
* D3050 Finned Tube Radiators	$
* D3050 Unit Heaters	$
* Rough-In / Conduit for Controls	$
* D3060 Electrical Metering	$
* D3060 DDC System	$
* Seismic Bracing	$
* Firestopping	$
* Insulation	$
* Chemical Water Treatment	$
* Test & Balance	$
* Hoisting / Rigging	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Overhead & Profit	$
* Add Performance and Payment Bond	$

SITEWORK - ADA RAMP - BUCKMAN IMPROVEMENTS:

* D3060 Electrical Metering	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

SITEWORK - ON-SITE IMPROVEMENTS (WITHIN BENSON PROPERTY LINE):

* D3060 Electrical Metering	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

SITEWORK - ROW - RIGHT-OF-WAY IMPROVEMENTS:

* D3060 Electrical Metering	$
* Trade Permits	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add Performance and Payment Bond	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

Base Bid **$0.00**

ALTERNATES

* Alternate # 4 - Reference Booklet p.19, item HVAC 11 - VRF system as described in ACCO VE 23-00 HVAC 11 in Z1010.30 Alternates.	$
* Alternate #5 - Reference Booklet p.19 item HCAC 14 - VAV system ILO DOAS & Chilled Beams as described in ACCO VE 23-00 HVAC 14 in Z1010.30 Alternates.	$
* Alternate #6 - Reference Booklet p.21, item HVAC 01 - Reduce quantity of Chilled Beams as described in PAE VE 23-00 HVAC 01 in Z1010.30 Alternates.	$
* Alternate #7 - Reference Booklet p.22, item HVAC 44 - Remove VAV TUs and demand control ventilation from DAS units as described in ACCO VE 23-00 HVAC 44 in Z1010.30 Alternates.	$
* Alternate #8 - ReferenceWood Window Restoration 02 - Reduce quantity of Chilled Beams as described in PAE VE 08-37 Wood Window Restoration 02, in Z1010.30 Alternates.	$

INCLUSIONS

Mark "yes" to all yes/no questions »

23-00 HVAC:

(HVAC) GENERAL ITEMS:

* (HVAC) The intent of this bid package is to contract with to assist with design and procurement of the scope of work described above. A limited notice to proceed for Preconstruction Services and/or design (as applies) will be issued, until the GMP contract is in place with the Owner-anticipated May/June 2021. Include breakdown on bid form for Preconstruction and/or Design (as applies) only, this amount will become both the initial contract value and the value that would be billed if project was canceled for any reason.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (HVAC) This scope of work description is intended to be indicative of the work to be performed but is not intended to describe all work necessary for a complete job. It is intended that, except as specifically provided herein, there shall be no change orders for any work or features that could be reasonably inferred to be required from the Contract Documents. If any of these instructions are contradictory to the manufacturers' recommendations or violates any code, industry standard, or good practice, it is the responsibility of the Subcontractor to bring this to the attention of the Contractor prior to starting any part of that Scope of Work. Continued...	○ Yes ○ No
* (HVAC) ... Subcontractor is responsible to provide all design, materials, labor, supervision, tools, fasteners, adhesives, escalation and equipment necessary for a complete this scope of work in scope in strict accordance with Andersen Bid Documents, approved plans and specifications, and to bring to the Contractors attention any substantive work missing from this description including but not limited to the following	○ Yes ○ No
* (HVAC) Include Preconstruction Requirements as outlined on Preconstruction Service Requirements scoping, and project schedule for a general idea of project design & construction timing that is planned at this time.	○ Yes ○ No
* (HVAC) RFP Estimate should include all information shown on project documents and narratives issued by Bassetti & subconsultants. Additionally, include all requirements in PPS Design Standards, unless noted on Deviations from PPS Standards dated 8/19/19.	○ Yes ○ No
* (HVAC) Include BIM Requirements as outlined in Project Conditions, Attachment 5.6: BIM Execution Plan	○ Yes ○ No
* (HVAC) Costs of all applicable trade permits, fees, and licenses (other than general building permit) are provided by this Subcontractor. Includes cost of plan check fees, if applicable.	○ Yes ○ No

* (HVAC) Provide all design-build/engineered framing, seismic bracing, anchoring design, engineering & materials required to support this system, including, but not limited to beams, posts, blocking, hangers, I-joists, plywood, etc. This includes adjustment of floor joist layout for plumbing, electrical, HVAC shafts, and fire sprinkler needs. For existing building assumptions, refer to drawings marked "Record Drawings, for reference Only." If information is not defined on this set of drawings, facility is available for bidder walk-thru for some as built confirmation. Additional information may be available via select demolition depending on school schedule while occupied until June 2021, or during demolition defined in the project schedule. Include coordination of locations and special inspection of anchors.	○ Yes ○ No
* (HVAC) Subcontractor shall provide anchors to secure equipment or piping. Cast in anchors will be utilized as needed for new work, and all anchors are to be submitted on and approved by the Structural Engineer. In slab coordination of embedded items will need to be coordinated with other MEP trades, Fireproofing Subcontractor, and Concrete Subcontractor. There will be multiple mobilizations required to install slab inserts at all new slabs being poured at the various buildings on the GHS campus.	○ Yes ○ No
* (HVAC) Note that depending on the final design of the construction documents, seismic / expansion joints may be required at the junction of some of the structures. Contractor shall provide the required expansion and contraction joints in the system as required by code or AHJ.	○ Yes ○ No
* (HVAC) Contractor is responsible to notify Andersen / Colas when Architectural review is required at various stages of construction as outlined in the spec.	○ Yes ○ No
* (HVAC) Any work in crawl space area will require special training. Refer to Project Conditions/Safety for additional information regarding confined space/potential hazardous materials (asbestos) in this area & training requirements. Include all costs for appropriate training and PPE in this scope of work.	○ Yes ○ No
* (HVAC) Includes all necessary coordination with other trades. Every effort will be made to conceal the piping, cabling, etc. within walls or soffits to limit the amount of visible MEP items.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (HVAC) Subcontractor shall provide access panels as needed for access to this scope of work, to be installed by drywall contractor, this includes fire rated panels where required in rated assemblies.	○ Yes	○ No
* (HVAC) Subcontractor to furnish and install any required backing, miscellaneous embedments, hangers or supports necessary for support of Subcontractors materials or equipment.	○ Yes	○ No
* (HVAC) Includes all work required for mock-ups listed in the specifications/front end documents. Assume 1 Corridor Mock up and 1 Classroom mock up to be built in place for review/coordination (as early as feasible in the project).	○ Yes	○ No
* (HVAC) Provide all required videotaped training of the Owner's personnel in location, function, control and emergency procedures for all fire protection systems and the preventive and periodic maintenance, and emergency repair procedures. The time and location of this training shall be at the sole discretion of the Owner. In addition, provide an approximate thirty (30) minute video of all system, maintenance and operation. Provide a sign-up sheet to the Owner / Contractor of personnel that attended training.	○ Yes	○ No
* (HVAC) A standard warranty as provided with warranty procedures as described in the contract documents. It is specifically noted and agreed that any equipment running before the date of acceptance shall not start the warranty period. Only the receipt of the occupancy permit and substantial completion certificate(s) shall start the warranty period. Includes the Letter of Conformance when all work is complete. Certain specifications require more that 1 year warranty, provide warranties that meet or exceed requirements in specs.	○ Yes	○ No
* (HVAC) Furnish and install all sleeves required in CMU and/or concrete. If sleeves required in the basement walls, include in your pricing for core drilling and link seal of piping through walls. Note that all link seals are to be installed from the inside face of any exterior foundation walls, so that they can be tightened up over time.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (HVAC) Provide all required fire caulking / safing necessary to achieve cover approval from the appropriate inspection agencies fire sprinkler work. Include submittals for fire caulking / safing indicating the methods to be used at various sections of the structure. Fire caulking and safing to be provided in Andersen in accordance with the plans and specifications and governing authorities. Fire caulking at exposed concrete or non painted CMU wall areas shall be gray in color. Subcontractors will agree on one manufacturer to be used for the entire project by each trade.	○ Yes ○ No
* (HVAC) The Subcontractor shall provide sealant around work which passes through cored holes, sleeves, framed, or blocked-out openings, drywall, floors, roofs, exterior walls, etc., in Andersen with local codes and specification requirements. Subcontractor shall provide all caulking, fire safing, flashings, counter flashings putty pads or other materials required for sealing their own penetrations. This work shall ensure prevention from the passage of smoke, gas, and flame between wall and floors and leaking water at waterproof membranes, flashing and roofing. Fire caulking work shall be included within the rough-in schedule for each floor.	○ Yes ○ No
* (HVAC) Penetrations in slab and shear walls are allowed only within the restrictions of the Structural Engineer's design and review / approval.	○ Yes ○ No
* (HVAC) All drilling, boxing, blocking etc. required for this work is to be completed by this Subcontractor. No cutting of structural members shall be allowed without written approval from the Superintendent. The repair cost for any damage caused by unapproved alterations to any part of the structure shall be deducted from contract amount.	○ Yes ○ No
* (HVAC) Coordinate the location of all items with architectural and structural features (including trim, columns, tile, appliances, cabinets, mirrors, etc.). Any items installed that will not allow the installation of designed features will be corrected at no additional cost.	○ Yes ○ No
* (HVAC) Provide all required hoisting for your scope of work. Andersen will not have a crane or forklift on site for subcontractor use. Provide unloading of own material. No long term stock piling of material on site due to limitation of space. Short term storage to be approved by Andersen supervision upon request.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (HVAC) Provide all acoustic, seismic and vibrations control as indicated in the project documents, governing authorities or as normally required for a complete system.	○ Yes ○ No
* (HVAC) Address in your proposal the method for this scope of work/system to remain operational prior to demolition & after demolition is complete. Since demolition will be performed by multiple companies, and in a phased fashion, include costs to install temporary isolation valves if necessary so that buildings and individual "sectors" can be isolated for shut off independently. Coordinate work as necessary with Demolition/Abatement contractors and/or local utility companies. It is intended to have utilities operational during the entire project construction. Some buildings/areas may be completed in advance of other buildings/areas and may need temporary utility feeds. Include the following components in your proposal. Participate in conversations & coordinate with local Fire Dept., PPS, Demo & Abatement contractors to facilitate this goal. Include new system coverage as early as possible with respects to Fire/Life Safety systems. Continued...	○ Yes ○ No
* (HVAC) ...Include all costs to cut, cap, drain, etc. to prepare system for demolition by others. If your intent is to reuse any part of the existing system, please indicate on proposal form what components you intend to reuse. Include removal and salvage of items related to this system identified in demolition spec (If applies). a. Main Building (Sectors A, B, E, G1, G2, D, I) Isolated from Auditorium-Sector A for some of the work b. Demolition & Construction of New Sectors C, F, H c. Demolition of existing Auto shop d. Relocation of Fire Line (if required) by Civil Contractor e. Maintaining Service with Existing/New Hydrants as pertains to your scope of work. f. Maintaining Temp Power, Gas, Water, Waste as pertains to your scope of work	○ Yes ○ No
* (HVAC) Refer to Owner Salvage Listing for all items that are required to be salvaged on this project. Perform Salvage work for same items that are included in New work to be removed, packaged, and transferred to a storage location within 25 miles of jobsite.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (HVAC) It is assumed that the scope of work for demolition and new construction for the Utility Trench(es) will be scoped with typical 5' rule for utilities by Plumbing, Waste, Fire. Assume Civil Contractor will install new utility trench and/or extensions if required. Exception: Electrical is assumed to be located in a separate utility trench (if not already indicated as direct bury) and will be completely furnished & installed (trench, conduit, wiring, etc.) by the electrical contractor if required.	○ Yes	○ No
* (HVAC) Be responsible for the start-up and commissioning of the fire protection system. Attend weekly commissioning coordination meetings, and complete all required start-up and commissioning test forms as required by the Commissioning Agency. Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes	○ No
* (HVAC) Include all slab on grade demolition/excavation, and existing wall penetrations as needed to facilitate work included in this subcontract.	○ Yes	○ No
* (HVAC) Escalation: refer to RFP Instructions/Budget Breakdown form for price escalation requirements.	○ Yes	○ No
* (HVAC) Include all requirements to safely handle lead/lead content shall be included in this scope of work, and performed by this contractor. Assume all existing surfaces include lead contaminates. A separate abatement contractor will not be hired to abate lead.	○ Yes	○ No
* (HVAC) Coordinate work, including layout for work to be performed by others regarding Asbestos abatement (must be performed by Abatement contractor).	○ Yes	○ No
* (HVAC) Incudes all required excavation and backfill for the plumbing underground scope of work for the remaining work on site drawings (within 5' of building) and for work under slab on grade. The slab on grade will be removed by others, trenching & piping placement is included in this scope of work, and includes layout of plumbing under slab utilities, including staking and pot-hole verifications.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (HVAC) Provide line and grade for own work from grid lines and elevation bench marks provided by others.	○ Yes	○ No
* (HVAC) Include all requirements pertaining to this scope of work as indicated on LEED Score Card	○ Yes	○ No
* (HVAC) Price to include all welding required for your scope of work including protection of other trades work.	○ Yes	○ No
* (HVAC) Review scope of work below regarding temporary services to facilitate demolition and/or construction operations (trailer area and onsite requirements). Include all work, including planning, permitting, etc. for items that are temporary in nature to facilitate project. If design is required solely for temporary items, include in this scope of work.	○ Yes	○ No
* (HVAC) Portland Public School Standards have been provided for reference only. Include a scoping letter that states that your bid complies with every item in the PPS standards, and if not, provide a marked up version of the PPS standards explaining requested changes to match bid.	○ Yes	○ No
* (HVAC) It is understood that this project may exceed code minimum. If bidder would like to submit Value Engineering to provide code minimum, ONLY, specify item in spec/PPS standards and deviation that is proposed to reach code minimum ONLY.	○ Yes	○ No
* (HVAC) Provide all identification markers, labels, tags and related signage per the contract documents and local code/AHJ.	○ Yes	○ No
* (HVAC) Coordinate with electrical contractor/designers for all power requirements related to your scope of work. Any changes caused by this subcontractor which affects the scope of the electrical firm will be the responsibility of this subcontractor.	○ Yes	○ No
* (HVAC) Coordinate the location of all items included in your scope of work with architectural and structural features (including trim, white boards, misc. wall mounted items, etc.). Any items installed that will not allow the installation of designed features will be corrected at no extra cost, provided that these design features were apparent at the time of installation.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (HVAC) Provide all testing, sterilization and certification of all systems as required by contract documents or as required by governing authorities. ○ Yes ○ No

* (HVAC) Andersen will provide egress lighting (via electrical subcontractor scope), each contractor is responsible for their own task lighting. ○ Yes ○ No

* (HVAC) Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning. ○ Yes ○ No

* (HVAC) Subcontractor shall take field measurements of tight or congested areas prior to fabrication of materials. Modifications to the Subcontractor's work due to the Subcontractor's failure to field measure these key areas will be at the Subcontractor's expense. The use of the BIM coordination plan will be used to the greatest extent possible, however, due to timing of the Existing Conditions Building Scan, and incorporation into Revit, some items may require field verification to continue design/coordination without the scan fully available/incorporated. ○ Yes ○ No

(HVAC) SPECIFIC ITEMS:

* (HVAC) Provide all required labor, material, equipment, wiring, and devices for the Mechanical System and Controls System Complete as described in Bid Package 23-00 Specifications. Includes all design, drawings, and start-up for a complete, functioning system. Please note: this scope of work is Design Assist. ○ Yes ○ No

* (HVAC) Provide all heating, air conditioning, and exhaust for all areas indicated on the contract documents. Include all equipment, chilled water supply/return, etc. for a complete system. Include all Building Automation Controls, including conduit for a fully operational system. If design is incomplete, make reasonable assumptions regarding scope to complete design/anticipated design development. ○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (HVAC) Provide all acoustical provisions at HVAC equipment, per the contract documents, including but not limited to duct liner, etc. as necessary to achieve acoustical performance and/or State energy requirements. Include temporary acoustic measures as required during construction to comply with City of Portland Noise regulations.	○ Yes	○ No
* (HVAC) Include flues and venting for boilers.	○ Yes	○ No
* (HVAC) Furnish and install all smoke dampers and end switches (standard voltage). Wiring and terminations by the electrical contractor.	○ Yes	○ No
* (HVAC) Includes cooling and ventilation for elevator machine room.	○ Yes	○ No
* (HVAC) Includes connections to Kitchen equipment supplied by others. Coordinate work, and include all fittings/extensions (including stainless steel) as required to complete installation of Kitchen equipment. Refer to Kitchen equipment / layout drawings for coordination items. Include grease ducts and fire insulation with required cleanouts.	○ Yes	○ No
* (HVAC) Provide exterior mechanical wall louvers, sleeves and hoods for all penetrations for this scope of work.	○ Yes	○ No
* (HVAC) Includes cooling and ventilating for electrical rooms, transformer rooms, and other spaces with equipment requiring cooling and ventilation such as data and communication closets.	○ Yes	○ No
* (HVAC) Provide flat black paint at interior of grilles if the interior is visible.	○ Yes	○ No
* (HVAC) Scope to include test, balance, start-up and commissioning for this scope of work.	○ Yes	○ No
* (HVAC) Disconnects and starters for mechanical equipment to be provided by this subcontractor and installed by the electrical contractors in accordance with mechanical and electrical coordination matrix.	○ Yes	○ No
* (HVAC) Furnish and install all controls wiring, conduit, etc. Coordinate requirements for line voltage power with electrical contractor.	○ Yes	○ No
* (HVAC) Provide pumps on condensate lines as required per length of run.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (HVAC) Scope includes furnish and install of heat trace as required on mechanical piping. Fire sprinkler piping and plumbing piping trace by others.	○ Yes	○ No
* (HVAC) Include draining down of all existing mechanical units that have Freon, dispose of Freon at approved location.	○ Yes	○ No

(HVAC) EXCLUDED ITEMS:

* Plumbing	○ Yes	○ No
* Temporary Services	○ Yes	○ No

(HVAC) GENERAL:

* (HVAC) Temporary Facilities are currently under development, a general list of requirements, based on a similar project is provided below to assist with budgeting process. MEP trades will assist in developing a final temp utility plan for the project. Each trade will be required to issue a narrative and drawing to demonstrate plan development and finalization. See attached Temporary Utility Service Assumptions Matrix and plan for general information/locations.	○ Yes	○ No
* (HVAC) In preparation of Demolition work starting Summer 2021, all trades will be requested to provide a plan for PREP work to occur during summer of 2020 to reduce the amount of time after building is vacated in summer 2021 to "make safe for demolition" activities completion. This early work will be issued as an early work authorization prior to GMP.	○ Yes	○ No
* (HVAC) All labor, supervision, materials, tools, equipment, fasteners, and adhesives as required to furnish install a complete system as outlined in the perspective bid package in accordance with all State Codes, Local Codes, NSC standards and jurisdictional codes & requirements, and in accordance with the contract documents.	○ Yes	○ No
* (HVAC) Include all trade specific permits.	○ Yes	○ No
* (HVAC) Inspect and test each service before placing temporary services in use. Arrange for required inspections and tests by governing authorities and obtain required certifications and permits for use. Inspect the power supply system from incoming gear to the spider boxes once a month. Report to Andersen and defects and results of monthly inspections.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (HVAC) Operate temporary services in a safe and efficient manner. Do not overload temporary services and facilities and do not let them interfere with the progress of work. ○ Yes ○ No

* (HVAC) Should services of an independent engineer be required to survey existing and or temporary services, cost shall be included by contractor. Do not allow hazardous conditions to develop or persist at the site. ○ Yes ○ No

(HVAC) TEMPORARY UTILITIES:

* (HVAC) Engage local utility companies to install temporary service to project or to make connections to existing service. ○ Yes ○ No

* (HVAC) Arrange with companies, Owner, and Andersen for an acceptable time for service interruptions, where necessary, to make connections for temporary services. ○ Yes ○ No

* (HVAC) Maintain service to Radio Station (Building I) to the greatest extent possible. Coordinate shutdowns as required. ○ Yes ○ No

23-00.1 CONTROLS:

(CONTROLS) GENERAL ITEMS:

* (Controls) The intent of this bid package is to contract with to assist with design and procurement of the scope of work described above. A limited notice to proceed for Preconstruction Services and/or design (as applies) will be issued, until the GMP contract is in place with the Owner-anticipated May/June 2021. Include breakdown on bid form for Preconstruction and/or Design (as applies) only, this amount will become both the initial contract value and the value that would be billed if project was canceled for any reason. ○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Controls) This scope of work description is intended to be indicative of the work to be performed but is not intended to describe all work necessary for a complete job. It is intended that, except as specifically provided herein, there shall be no change orders for any work or features that could be reasonably inferred to be required from the Contract Documents. If any of the instructions in the Scope of Work is contradictory to the manufacturers' recommendations or violates any code, industry standard, or good practice, it is the responsibility of the Subcontractor to bring this to the attention of the Contractor prior to starting any part of that Scope of Work. Continued...	○ Yes	○ No
* (Controls) ... Subcontractor is responsible to provide all design, materials, labor, supervision, tools, fasteners, adhesives, escalation and equipment necessary for a complete this scope of work in scope in strict accordance with Andersen Bid Documents, approved plans and specifications, and to bring to the Contractors attention any substantive work missing from this description including but not limited to the following	○ Yes	○ No
* (Controls) Include Preconstruction Requirements as outlined on Preconstruction Service Requirements scoping, and project schedule for a general idea of project design & construction timing that is planned at this time.	○ Yes	○ No
* (Controls) RFP Estimate should include all information shown on project documents and narratives issued by Bassetti & subconsultants. Additionally, include all requirements in PPS Design Standards, unless noted on Deviations from PPS Standards dated 8/19/19.	○ Yes	○ No
* (Controls) Include BIM Requirements as outlined in Project Conditions, Attachment 5.6: BIM Execution Plan	○ Yes	○ No
* (Controls) Costs of all applicable trade permits, fees, and licenses (other than general building permit) are provided by this Subcontractor. Includes cost of plan check fees, if applicable.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Controls) Provide all design-build/engineered framing, seismic bracing, anchoring design, engineering & materials required to support this system, including, but not limited to beams, posts, blocking, hangers, I-joists, plywood, etc. This includes adjustment of floor joist layout for plumbing, electrical, HVAC shafts, and fire sprinkler needs. For existing building assumptions, refer to drawings marked "Record Drawings, for reference Only." If information is not defined on this set of drawings, facility is available for bidder walk-thru for some as built confirmation. Additional information may be available via select demolition depending on school schedule while occupied until June 2021, or during demolition defined in the project schedule. Include coordination of locations and special inspection of anchors.	○ Yes	○ No
* (Controls) Subcontractor shall provide anchors to secure equipment or piping. Cast in anchors will be utilized as needed for new work, and all anchors are to be submitted on and approved by the Structural Engineer. In slab coordination of embedded items will need to be coordinated with other MEP trades, Fireproofing Subcontractor, and Concrete Subcontractor. There will be multiple mobilizations required to install slab inserts at all new slabs being poured at the various buildings on the GHS campus.	○ Yes	○ No
* (Controls) Note that depending on the final design of the construction documents, seismic / expansion joints may be required at the junction of some of the structures. Contractor shall provide the required expansion and contraction joints in the system as required by code or AHJ.	○ Yes	○ No
* (Controls) Contractor is responsible to notify Andersen / Colas when Architectural review is required at various stages of construction as outlined in the spec.	○ Yes	○ No
* (Controls) Any work in crawl space area will require special training. Refer to Project Conditions/Safety for additional information regarding confined space/potential hazardous materials (asbestos) in this area & training requirements. Include all costs for appropriate training and PPE in this scope of work.	○ Yes	○ No
* (Controls) Includes all necessary coordination with other trades. Every effort will be made to conceal the piping, cabling, etc. within walls or soffits to limit the amount of visible MEP items.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Controls) Subcontractor shall provide access panels as needed for access to this scope of work, to be installed by drywall contractor, this includes fire rated panels where required in rated assemblies.	○ Yes	○ No
* (Controls) Subcontractor to furnish and install any required backing, miscellaneous embedments, hangers or supports necessary for support of Subcontractors materials or equipment.	○ Yes	○ No
* (Controls) Includes all work required for mock-ups listed in the specifications/front end documents. Assume 1 Corridor Mock up and 1 Classroom mock up to be built in place for review/coordination (as early as feasible in the project).	○ Yes	○ No
* (Controls) Provide all required videotaped training of the Owner's personnel in location, function, control and emergency procedures for all fire protection systems and the preventive and periodic maintenance, and emergency repair procedures. The time and location of this training shall be at the sole discretion of the Owner. In addition, provide an approximate thirty (30) minute video of all system, maintenance and operation. Provide a sign-up sheet to the Owner / Contractor of personnel that attended training.	○ Yes	○ No
* (Controls) A standard warranty as provided with warranty procedures as described in the contract documents. It is specifically noted and agreed that any equipment running before the date of acceptance shall not start the warranty period. Only the receipt of the occupancy permit and substantial completion certificate(s) shall start the warranty period. Includes the Letter of Conformance when all work is complete. Certain specifications require more that 1 year warranty, provide warranties that meet or exceed requirements in specs.	○ Yes	○ No
* (Controls) Furnish and install all sleeves required in CMU and/or concrete. If sleeves required in the basement walls, include in your pricing for core drilling and link seal of piping through walls. Note that all link seals are to be installed from the inside face of any exterior foundation walls, so that they can be tightened up over time.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Controls) Provide all required fire caulking / safing necessary to achieve cover approval from the appropriate inspection agencies fire sprinkler work. Include submittals for fire caulking / safing indicating the methods to be used at various sections of the structure. Fire caulking and safing to be provided in Andersen in accordance with the plans and specifications and governing authorities. Fire caulking at exposed concrete or non painted CMU wall areas shall be gray in color. Subcontractors will agree on one manufacturer to be used for the entire project by each trade.	○ Yes ○ No
* (Controls) The Subcontractor shall provide sealant around work which passes through cored holes, sleeves, framed, or blocked-out openings, drywall, floors, roofs, exterior walls, etc., in Andersen with local codes and specification requirements. Subcontractor shall provide all caulking, fire safing, flashings, counter flashings putty pads or other materials required for sealing their own penetrations. This work shall ensure prevention from the passage of smoke, gas, and flame between wall and floors and leaking water at waterproof membranes, flashing and roofing. Fire caulking work shall be included within the rough-in schedule for each floor.	○ Yes ○ No
* (Controls) Penetrations in slab and shear walls are allowed only within the restrictions of the Structural Engineer's design and review / approval.	○ Yes ○ No
* (Controls) All drilling, boxing, blocking etc. required for this work is to be completed by this Subcontractor. No cutting of structural members shall be allowed without written approval from the Superintendent. The repair cost for any damage caused by unapproved alterations to any part of the structure shall be deducted from contract amount.	○ Yes ○ No
* (Controls) Coordinate the location of all items with architectural and structural features (including trim, columns, tile, appliances, cabinets, mirrors, etc.). Any items installed that will not allow the installation of designed features will be corrected at no additional cost.	○ Yes ○ No
* (Controls) Provide all required hoisting for your scope of work. Andersen will not have a crane or forklift on site for subcontractor use. Provide unloading of own material. No long term stock piling of material on site due to limitation of space. Short term storage to be approved by Andersen supervision upon request.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Controls) Provide all acoustic, seismic and vibrations control as indicated in the project documents, governing authorities or as normally required for a complete system.	○ Yes ○ No
* (Controls) Address in your proposal the method for this scope of work/system to remain operational prior to demolition & after demolition is complete. Since demolition will be performed by multiple companies, and in a phased fashion, include costs to install temporary isolation valves if necessary so that buildings and individual "sectors" can be isolated for shut off independently. Coordinate work as necessary with Demolition/Abatement contractors and/or local utility companies. It is intended to have utilities operational during the entire project construction. Some buildings/areas may be completed in advance of other buildings/areas and may need temporary utility feeds. Continued...	○ Yes ○ No
* (Controls) ... Include the following components in your proposal. Participate in conversations & coordinate with local Fire Dept., PPS, Demo & Abatement contractors to facilitate this goal. Include new system coverage as early as possible with respects to Fire/Life Safety systems. Include all costs to cut, cap, drain, etc. to prepare system for demolition by others. If your intent is to reuse any part of the existing system, please indicate which components. Include removal and salvage of items related to this system identified in demolition spec (If applies). a. Main Building (Sectors A, B, E, G1, G2, D, I) Isolated from Auditorium-Sector A for some of the work b. Demolition & Construction of New Sectors C, F, H c. Demolition of existing Auto shop d. Relocation of Fire Line (if required) by Civil Contractor e. Maintaining Service with Existing/New Hydrants as pertains to your scope of work. f. Maintaining Temp Power, Gas, Water, Waste as pertains to your scope of work	○ Yes ○ No
* (Controls) Refer to Owner Salvage Listing for all items that are required to be salvaged on this project. Perform Salvage work for same items that are included in New work to be removed, packaged, and transferred to a storage location within 25 miles of jobsite.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Controls) It is assumed that the scope of work for demolition and new construction for the Utility Trench(es) will be scoped with typical 5' rule for utilities by Plumbing, Waste, Fire. Assume Civil Contractor will install new utility trench and/or extensions if required. Exception: Electrical is assumed to be located in a separate utility trench (if not already indicated as direct bury) and will be completely furnished & installed (trench, conduit, wiring, etc.) by the electrical contractor if required.	○ Yes ○ No
* (Controls) Be responsible for the start-up and commissioning of the fire protection system. Attend weekly commissioning coordination meetings, and complete all required start-up and commissioning test forms as required by the Commissioning Agency. Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (Controls) Include all slab on grade demolition/excavation, and existing wall penetrations as needed to facilitate work included in this subcontract.	○ Yes ○ No
* (Controls) Escalation: refer to RFP Instructions/Budget Breakdown form for price escalation requirements.	○ Yes ○ No
* (Controls) Include all requirements to safely handle lead/lead content shall be included in this scope of work, and performed by this contractor. Assume all existing surfaces include lead contaminates. A separate abatement contractor will not be hired to abate lead.	○ Yes ○ No
* (Controls) Coordinate work, including layout for work to be performed by others regarding Asbestos abatement (must be performed by Abatement contractor).	○ Yes ○ No
* (Controls) Incudes all required excavation and backfill for the plumbing underground scope of work for the remaining work on site drawings (within 5' of building) and for work under slab on grade. The slab on grade will be removed by others, trenching & piping placement is included in this scope of work, and includes layout of plumbing under slab utilities, including staking and pot-hole verifications.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Controls) Provide line and grade for own work from grid lines and elevation bench marks provided by others.	○ Yes	○ No
* (Controls) Include all requirements pertaining to this scope of work as indicated on LEED Score Card	○ Yes	○ No
* (Controls) Price to include all welding required for your scope of work including protection of other trades work.	○ Yes	○ No
* (Controls) Review scope of work below regarding temporary services to facilitate demolition and/or construction operations (trailer area and onsite requirements). Include all work, including planning, permitting, etc. for items that are temporary in nature to facilitate project. If design is required solely for temporary items, include in this scope of work.	○ Yes	○ No
* (Controls) Portland Public School Standards have been provided for reference only. Include a scoping letter that states that your bid complies with every item in the PPS standards, and if not, provide a marked up version of the PPS standards explaining requested changes to match bid.	○ Yes	○ No
* (Controls) It is understood that this project may exceed code minimum. If bidder would like to submit Value Engineering to provide code minimum, ONLY, specify item in spec/PPS standards and deviation that is proposed to reach code minimum ONLY.	○ Yes	○ No
* (Controls) Provide all identification markers, labels, tags and related signage per the contract documents and local code/AHJ.	○ Yes	○ No
* (Controls) Coordinate with electrical contractor/designers for all power requirements related to your scope of work. Any changes caused by this subcontractor which affects the scope of the electrical firm will be the responsibility of this subcontractor.	○ Yes	○ No
* (Controls) Coordinate the location of all items included in your scope of work with architectural and structural features (including trim, white boards, misc. wall mounted items, etc.). Any items installed that will not allow the installation of designed features will be corrected at no extra cost, provided that these design features were apparent at the time of installation.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Controls) Provide all testing, sterilization and certification of all systems as required by contract documents or as required by governing authorities.	○ Yes ○ No
* (Controls) Andersen will provide egress lighting (via electrical subcontractor scope), each contractor is responsible for their own task lighting.	○ Yes ○ No
* (Controls) Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (Controls) Subcontractor shall take field measurements of tight or congested areas prior to fabrication of materials. Modifications to the Subcontractor's work due to the Subcontractor's failure to field measure these key areas will be at the Subcontractor's expense. The use of the BIM coordination plan will be used to the greatest extent possible, however, due to timing of the Existing Conditions Building Scan, and incorporation into Revit, some items may require field verification to continue design/coordination without the scan fully available/incorporated.	○ Yes ○ No

(CONTROLS) SPECIFIC ITEMS:

* (Controls) Provide all required labor, material, equipment, wiring (including raceways), and devices for the Building Automation (Controls) as described in Specifications. Includes all design, drawings, and start-up for a complete, functioning system. Please note: this scope of work is Design Build.	○ Yes ○ No
* (Controls) Scope includes all labor and materials for a complete project with all required/necessary programing, start up, wiring, and check out for a complete turnkey system.	○ Yes ○ No
* (Controls) Scope includes controls for but not limited to: all AHU, VAV AHU, HRV AHU, all exhaust fans, FCU, Fan powered box w/HW reheat, VAV w/HW reheat, VAV cool only, CVT/FPR/FTR, RCP, Boiler HW System, sump pumps, power supplies, enclosures, input/output modules, all sensors, humidity sensors, pressure sensors, all relays, all switches, all control power transformers, variable frequency drives, etc..	○ Yes ○ No

* (Controls) Scope includes but not limited to all required components for a complete system including provide and monitor all air temp, air pressure, HW valve, RA smoke detector, all air dampers, SA, EA VFD, OSA Airflow stations, 2 stages of DX cooling, room pressure sensor, low temp sensor, valve actuators, sump pumps, immersion temps. Water pumps, generator points (running, warning, failure, low fuel etc.), Natural gas, PV KH meter, power to DDC, all C02 sensors, butterfly valves, flow meters, DP sensors, etc..	○ Yes ○ No
* (Controls) Scope includes provide and install all control valves, control dampers, air flow stations and water flow meters, including nipples and block valves, pipe flow switches, temperature wells, pipe pressure transmitter tapes, including nipple and block valves.	○ Yes ○ No
* (Controls) Scope includes wire colored coding as per the specifications. All control wiring will require slide-on type wire markers. Andersen reserves the right to review, and approve the wire numbering scheme.	○ Yes ○ No
* (Controls) Scope includes all required labor and materials for a complete network system (Primary and secondary)	○ Yes ○ No
* (Controls) Scope includes all labor and materials for all required/necessary servers, Jace controllers, power supplies, communications, input/output modules.	○ Yes ○ No
* (Controls) Scope includes a fully functioning BACnet capable system. Including all required pushbutton override stations. All programing and testing for a complete functioning system per manufacture specifications.	○ Yes ○ No
* (Controls) Scope includes labor and materials for integration of all field equipment panels (furnished by others). See attached Controls Matrix for a breakdown of responsibilities by trade.	○ Yes ○ No
* (Controls) Scope includes labor and material for a full integrated automation software for control and monitoring networks. Including the specific instructions included in specifications.	○ Yes ○ No
* (Controls) Scope includes individually licensed controllers.	○ Yes ○ No
* (Controls) The new project areas will have a complete new electronic direct digital controls (DDC) system. All the new systems will have a graphical interface. The graphic screens will be a “submittal” item, to be approved by the owner.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Controls) The controls contractor shall be responsible for all wire, and terminations for the controls system. Conduit to be provided as part of this package	○ Yes	○ No
* (Controls) The control contractor shall furnish all instrumentation, control devices, and associated hardware.	○ Yes	○ No
* (Controls) Instrument calibration/loop tuning and loop checks shall be performed and documented by the controls contractor.	○ Yes	○ No
* (Controls) Controls contractor to identify location needed for all 120 Volt power for the controls system.	○ Yes	○ No
* (Controls) Controls contractor to furnish and install outdoor static pressure sensors.	○ Yes	○ No
* (Controls) UPS equipment required for building controls will be provided by the controls contractor.	○ Yes	○ No
* (Controls) Scope includes owner training on the full system once the system has been installed and completely commissioned by this subcontractor with no errors or open items.	○ Yes	○ No
* (Controls) Scope includes support to the third-party commissioning agent for the project as required.	○ Yes	○ No
* (Controls) Scope includes a functional performance test plan in accordance to spec sections	○ Yes	○ No
* (Controls) Include costs for factory training, for specialty equipment as required to train controls staff as needed (May occur at manufacturer training facilities, depending on equipment selected).	○ Yes	○ No

(CONTROLS) TEMPORARY SERVICES:

(CONTROLS) GENERAL:

* (Controls) Temporary Facilities are currently under development, a general list of requirements, based on a similar project is provided below to assist with budgeting process. MEP trades will assist in developing a final temp utility plan for the project. Each trade will be required to issue a narrative and drawing to demonstrate plan development and finalization. See attached Temporary Utility Service Assumptions Matrix and plan for general information/locations.	○ Yes	○ No

* (Controls) In preparation of Demolition work starting Summer 2021, all trades will be requested to provide a plan for PREP work to occur during summer of 2020 to reduce the amount of time after building is vacated in summer 2021 to "make safe for demolition" activities completion. This early work will be issued as an early work authorization prior to GMP.	○ Yes ○ No
* (Controls) All labor, supervision, materials, tools, equipment, fasteners, and adhesives as required to furnish install a complete system as outlined in the perspective bid package in accordance with all State Codes, Local Codes, NSC standards and jurisdictional codes & requirements, and in accordance with the contract documents.	○ Yes ○ No
* (Controls) Include all trade specific permits.	○ Yes ○ No
* (Controls) Inspect and test each service before placing temporary services in use. Arrange for required inspections and tests by governing authorities and obtain required certifications and permits for use. Inspect the power supply system from incoming gear to the spider boxes once a month. Report to Andersen and defects and results of monthly inspections..	○ Yes ○ No
* (Controls) Operate temporary services in a safe and efficient manner. Do not overload temporary services and facilities and do not let them interfere with the progress of work.	○ Yes ○ No
* (Controls) Should services of an independent engineer be required to survey existing and or temporary services, cost shall be included by contractor. Do not allow hazardous conditions to develop or persist at the site.	○ Yes ○ No

(CONTROLS) TEMPORARY UTILITIES:

* (Controls) Engage local utility companies to install temporary service to project or to make connections to existing service.	○ Yes ○ No
* (Controls) Arrange with companies, Owner, and Andersen for an acceptable time for service interruptions, where necessary, to make connections for temporary services.	○ Yes ○ No
* (Controls) Maintain service to Radio Station (Building I) to the greatest extent possible. Coordinate shutdowns as required.	○ Yes ○ No

GENERAL ACKNOWLEDGMENTS

Mark "yes" to all yes/no questions »

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

BUDGET SUMMARY (DIRECT COST SUBTOTAL OF EACH BUILDING FROM ABOVE):

* Demo of 1916 Boiler House & 1953 Science Wing (Safe-Off Only)	$
* Demo of 1918 South Shop Wing (Safe-Off Only)	$
* Demo of 1953 Automotive Building (Safe-Off Only)	$
* Building A - 1930 Auditorium Building	$
* Building B - 1991 Library Building	$
* Building C - New North Wing w/ Salvaged 1917 Historic Wall	$
* Building D - 1917 Foundry Building	$
* Building E - 1916 Main Building	$
* Building F - New Commons Building	$
* Building G1 - 1925 Aux Gym Building	$
* Building G2 - 1964 Main Gym Building	$
* Building H - New South Shop Building	$
* Building I - 1992 KBPS Building	$
* Sitework - ADA Ramp - Buckman Improvements	$
* Sitework - On-Site Improvements (within Benson Property Line)	$
* Sitework - ROW - Right-of-Way Improvements	$

SUMMARY INDIRECTS:

* Overhead & Profit Total All Buildings & Site Categories	$
* Preconstruction Total All Buildings & Site Categories	$
* BIM - During Preconstruction (up to 50% CD) Total all Buildings & Site Categories	$
* BIM - During Construction (after 50% CD) Total all Buildings & Site Categories	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Oregon Corporate Activities Tax	$
* OCIP Credit	$
* Performance & Payment Bond	$

ALL ANDERSEN RFP DOCUMENTS (SEE FILE 00 RFP TABLE OF CONTENTS FOR COMPLETE LISTING):

* 01 Request for Proposals & Instructions	○ Yes ○ No
* 02 Estimating Forms (Use Building Connected)	○ Yes ○ No
* 03 Scope of Work (Use Building Connected)	○ Yes ○ No
* 04 Document Listing	○ Yes ○ No
* 05 Project Schedules	○ Yes ○ No
* 06 Subcontractor Prequalification Requirements	○ Yes ○ No
* 07 Subcontractor Agreement Form and All Exhibits (Key Exhibits Highlighted Below, See TOC for Complete Listing)	○ Yes ○ No
* 07 SC Exhibit 5 Site Specific Work Regulations	○ Yes ○ No
* 07 SC Exhibit 5.1 BHS PPS/Andersen Prime Agreement	○ Yes ○ No
* 07 SC Exhibit 5.2 Career Learning Requirements	○ Yes ○ No
* 07 SC Exhibit 5.3 Contractor Workforce Training & Hiring Program	○ Yes ○ No
* 07 SC Exhibit 5.4 Insurance Requirements - PPS OCIP Guidebook & Enrollment Forms - Sample	○ Yes ○ No
* 07 SC Exhibit 5.5 Insurance Requirements - PPS Non-OCIP - Sample	○ Yes ○ No
* 07 SC Exhibit 5.6 BIM Execution Plan	○ Yes ○ No
* 07 SC Exhibit 5.7 BOLI Wage Rates (July 2019 Booklet for Reference Only)	○ Yes ○ No
* 07 SC Exhibit 6 Site Logistics Plan	○ Yes ○ No
* 07 SC Exhibit A Safety Handbook 2018	○ Yes ○ No
* 07 SC Exhibit B Anti-Harassment Policy 2018	○ Yes ○ No
* 07 SC Exhibit C Safety Disciplinary Policy	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

DOCUMENT LISTING (SEE TABLE OF CONTENTS FOR FULL LISTING):

* Bassetti 100% Schematic Design Package dated August 19, 2019	○ Yes	○ No
* PPS Standards	○ Yes	○ No
* Record Drawings	○ Yes	○ No
* Environmental, Historical, and Diligence Reports	○ Yes	○ No

SUBMITTAL AND PRODUCT DELIVERY ARE IMPORTANT FACTORS IN CONTRACT AWARD; PROVIDE THE FOLLOWING SCHEDULE INFORMATION:

Submittals - list number of days required to complete	*input response here*
Product Data - list number of days required to complete	*input response here*
Shop Drawings - list number of days required to complete	*input response here*
Material Lead Time (after approved submittals) - list number of days	*input response here*
Date of Material / Equipment Delivery FOB jobsite	*input response here*

BOND INFORMATION

* Provide added cost for performance and payment bond	$

FEES AND MARKUPS

* Mark up on Own Work (Max 15% Labor, 10% Equipment, 10% Materials)	%
* Mark up on lower tier subs (Max 10% for $0-$5k, 5% for >$5k)	%

LABOR RATES

Foreman Standard Time	per hour	$
Foreman Time-and-a-Half	per hour	$
Foreman Double Time	per hour	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

Journeyman Standard Time	per hour	$
Journeyman Time-and-a-Half	per hour	$
Journeyman Double Time	per hour	$
Apprentice Standard Time	per hour	$
Apprentice Time-and-a-Half	per hour	$
Apprentice Double Time	per hour	$
Other Standard Time	per hour	$
Other Time-and-a-Half	per hour	$
Other Double Time	per hour	$

CERTIFICATIONS

* Is your firm a state certified Minority Business Enterprise?	○ Yes ○ No
* Is your firm a state certified Women-Owned Business Enterprise?	○ Yes ○ No
* Is your firm a state certified Emerging Small Business?	○ Yes ○ No
* Is your firm a state certified Disadvantaged Business Enterprise?	○ Yes ○ No
* Is your firm a state certified Disabled Veteran-Owned Business Enterprise?	○ Yes ○ No
* Is your firm union or non-union?	*input response here*

DISCLAIMERS AND CLARIFICATIONS

Andersen is an equal opportunity employer and strongly encourages the participation of emerging small business, women-owned, disadvantaged, disabled veterans and minority enterprises.

IN SUBMITTING THIS BID, YOUR FIRM AGREES TO THE FOLLOWING CONDITIONS:

To hold bid open for the number of days as specified in the Request for Bids and Bid Instruction

To accept the provisions of the Front End Documents and Divisions 00 and 01 specifications

To enter into and execute an unmodified Subcontract / Purchase Agreement if awarded on the basis of this bid

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

To accomplish the Work in accordance with the Contract Documents

To commence work under this contract immediately when directed and substantially complete the work within the durations shown on the project schedule

ATTACHMENTS

⊕ *upload files*

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

Bid package created on Sep 6, 2019 at 8:28 PDT

Andersen Construction Company

6712 N Cutter Cir, Portland, OR 97217, USA

Elliott Bourgeois | Assistant Estimator | (503) 283-6712 | ebourgeois@andersen-const.com

ANDERSEN CONSTRUCTION

LINE ITEMS

Description	Quantity	Unit Cost	Total Cost
DEMO OF 1916 BOILER HOUSE & 1953 SCIENCE WING (SAFE-OFF ONLY):			
* Safe-Off at Structures to be Demolished			$
* Safe-Off for Interior Demo at Structures to Remain			$
* Temp Electrical Service (does not include consumption)			$
* Temp Lighting (does not include consumption)			$
* Trade Permits			$
* Design Fees for PV Scope			$
* General Conditions (See Cost Inclusions Matrix Tab)			$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)			$
* Overhead & Profit			$
* Add performance and payment bond			$
DEMO OF 1918 SOUTH SHOP WING (SAFE-OFF ONLY):			
* Safe-Off at Structures to be Demolished			$
* Safe-Off for Interior Demo at Structures to Remain			$
* Temp Electrical Service (does not include consumption)			$
* Temp Lighting (does not include consumption)			$

SUBMIT ONLINE

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

DEMO OF 1953 AUTOMOTIVE BUILDING (SAFE-OFF ONLY):

* Safe-Off at Structures to be Demolished	$
* Safe-Off for Interior Demo at Structures to Remain	$
* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

BUILDING A - 1930 AUDITORIUM BUILDING:

* D5010 Power Service	$
* D5010 Power Distribution	$
* D5020 Light Fixtures & Controls - Purchase Only - Theater	$
* D5020 Light Fixtures & Controls - Purchase Only - All Other	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D5020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - Theater	$
* D5020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - All Other	$
* Rough-In Fire Alarm	$
* Rough-In Distributed Antenna System (DAS)	$
* Rough-In Security, Access, and Surveillance	$
* Rough-In Video Surveillance	$
* Rough-In Voice & Data Systems	$
* Rough-In Public Address & Music Systems	$
* Rough-In Audio/Visual	$
* Cable Tray for Low Voltage Systems	$
* Mechanical Connections	$
* D5090 PV Arrays	$
* G4010 Transformers	$
* G4010 Generator - 80 kW	$
* D5030 Fire Alarm - Wiring & Devices	$
* D5030 Security Access & Surveillance - Wiring & Devices	$
* D5030 Video Surveillance - Wiring & Devices	$
* D5030 Clock & Paging System - Devices	$
* D5030 Voice & Data Systems - Wiring & Devices	$
* D5030 Public Address & Music Systems - Wiring & Devices	$
* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Building	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Heat Trace	$
* Hoisting / Rigging	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

BUILDING B - 1991 LIBRARY BUILDING:

* D5010 Power Service	$
* D5010 Power Distribution	$
* D5020 Light Fixtures & Controls - Purchase Only - All Other	$
* D5020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - All Other	$
* Rough-In Fire Alarm	$
* Rough-In Distributed Antenna System (DAS)	$
* Rough-In Security, Access, and Surveillance	$
* Rough-In Video Surveillance	$
* Rough-In Voice & Data Systems	$
* Rough-In Public Address & Music Systems	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Rough-In Audio/Visual	$
* Cable Tray for Low Voltage Systems	$
* Mechanical Connections	$
* D5090 PV Arrays	$
* G4010 Transformers	$
* G4010 Generator - 80 kW	$
* D5030 Fire Alarm - Wiring & Devices	$
* D5030 Security Access & Surveillance - Wiring & Devices	$
* D5030 Video Surveillance - Wiring & Devices	$
* D5030 Clock & Paging System - Devices	$
* D5030 Voice & Data Systems - Wiring & Devices	$
* D5030 Public Address & Music Systems - Wiring & Devices	$
* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Heat Trace	$
* Hoisting / Rigging	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$

powered by BUILDINGCONNECTED

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

BUILDING C - NEW NORTH WING W/ SALVAGED 1917 HISTORIC WALL:

* D5010 Power Service	$
* D5010 Power Distribution	$
* D5020 Light Fixtures & Controls - Purchase Only - All Other	$
* D5020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - All Other	$
* Rough-In Fire Alarm	$
* Rough-In Distributed Antenna System (DAS)	$
* Rough-In Security, Access, and Surveillance	$
* Rough-In Video Surveillance	$
* Rough-In Voice & Data Systems	$
* Rough-In Public Address & Music Systems	$
* Rough-In Audio/Visual	$
* Cable Tray for Low Voltage Systems	$
* Mechanical Connections	$
* D5090 PV Arrays	$
* G4010 Transformers	$
* G4010 Generator - 80 kW	$
* D5030 Fire Alarm - Wiring & Devices	$
* D5030 Security Access & Surveillance - Wiring & Devices	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D5030 Video Surveillance - Wiring & Devices	$
* D5030 Clock & Paging System - Devices	$
* D5030 Voice & Data Systems - Wiring & Devices	$
* D5030 Public Address & Music Systems - Wiring & Devices	$
* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Heat Trace	$
* Hoisting / Rigging	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

BUILDING D - 1917 FOUNDRY BUILDING:

* D5010 Power Service	$
* D5010 Power Distribution	$
* D5020 Light Fixtures & Controls - Purchase Only - All Other	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D5020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - All Other	$
* Rough-In Fire Alarm	$
* Rough-In Distributed Antenna System (DAS)	$
* Rough-In Security, Access, and Surveillance	$
* Rough-In Video Surveillance	$
* Rough-In Voice & Data Systems	$
* Rough-In Public Address & Music Systems	$
* Rough-In Audio/Visual	$
* Cable Tray for Low Voltage Systems	$
* Mechanical Connections	$
* D5090 PV Arrays	$
* G4010 Transformers	$
* G4010 Generator - 80 kW	$
* D5030 Fire Alarm - Wiring & Devices	$
* D5030 Security Access & Surveillance - Wiring & Devices	$
* D5030 Video Surveillance - Wiring & Devices	$
* D5030 Clock & Paging System - Devices	$
* D5030 Voice & Data Systems - Wiring & Devices	$
* D5030 Public Address & Music Systems - Wiring & Devices	$
* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Building	$
* Sawcutting	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Seismic Bracing	$
* Firestopping	$
* Heat Trace	$
* Hoisting / Rigging	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

BUILDING E - 1916 MAIN BUILDING:

* D5010 Power Service	$
* D5010 Power Distribution	$
* D5020 Light Fixtures & Controls - Purchase Only - All Other	$
* D5020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - All Other	$
* Rough-In Fire Alarm	$
* Rough-In Distributed Antenna System (DAS)	$
* Rough-In Security, Access, and Surveillance	$
* Rough-In Video Surveillance	$
* Rough-In Voice & Data Systems	$
* Rough-In Public Address & Music Systems	$
* Rough-In Audio/Visual	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Cable Tray for Low Voltage Systems	$
* Mechanical Connections	$
* D5090 PV Arrays	$
* G4010 Transformers	$
* G4010 Generator - 80 kW	$
* D5030 Fire Alarm - Wiring & Devices	$
* D5030 Security Access & Surveillance - Wiring & Devices	$
* D5030 Video Surveillance - Wiring & Devices	$
* D5030 Clock & Paging System - Devices	$
* D5030 Voice & Data Systems - Wiring & Devices	$
* D5030 Public Address & Music Systems - Wiring & Devices	$
* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Heat Trace	$
* Hoisting / Rigging	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Overhead & Profit	$
* Add performance and payment bond	$

BUILDING F - NEW COMMONS BUILDING:

* D5010 Power Service	$
* D5010 Power Distribution	$
* D5020 Light Fixtures & Controls - Purchase Only - All Other	$
* D5020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - All Other	$
* Rough-In Fire Alarm	$
* Rough-In Distributed Antenna System (DAS)	$
* Rough-In Security, Access, and Surveillance	$
* Rough-In Video Surveillance	$
* Rough-In Voice & Data Systems	$
* Rough-In Public Address & Music Systems	$
* Rough-In Audio/Visual	$
* Cable Tray for Low Voltage Systems	$
* Mechanical Connections	$
* D5090 PV Arrays	$
* G4010 Transformers	$
* G4010 Generator - 80 kW	$
* D5030 Fire Alarm - Wiring & Devices	$
* D5030 Security Access & Surveillance - Wiring & Devices	$
* D5030 Video Surveillance - Wiring & Devices	$
* D5030 Clock & Paging System - Devices	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D5030 Voice & Data Systems - Wiring & Devices	$
* D5030 Public Address & Music Systems - Wiring & Devices	$
* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Heat Trace	$
* Hoisting / Rigging	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

BUILDING G1 - 1925 AUX GYM BUILDING:

* D5010 Power Service	$
* D5010 Power Distribution	$
* D5020 Light Fixtures & Controls - Purchase Only - All Other	$
* D5020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - All Other	$
* Rough-In Fire Alarm	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Rough-In Distributed Antenna System (DAS)	$
* Rough-In Security, Access, and Surveillance	$
* Rough-In Video Surveillance	$
* Rough-In Voice & Data Systems	$
* Rough-In Public Address & Music Systems	$
* Rough-In Audio/Visual	$
* Cable Tray for Low Voltage Systems	$
* Mechanical Connections	$
* D5090 PV Arrays	$
* G4010 Transformers	$
* G4010 Generator - 80 kW	$
* D5030 Fire Alarm - Wiring & Devices	$
* D5030 Security Access & Surveillance - Wiring & Devices	$
* D5030 Video Surveillance - Wiring & Devices	$
* D5030 Clock & Paging System - Devices	$
* D5030 Voice & Data Systems - Wiring & Devices	$
* D5030 Public Address & Music Systems - Wiring & Devices	$
* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Heat Trace	$
* Hoisting / Rigging	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

BUILDING G2 - 1964 MAIN GYM BUILDING:

* D5010 Power Service	$
* D5010 Power Distribution	$
* D5020 Light Fixtures & Controls - Purchase Only - All Other	$
* D5020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - All Other	$
* Rough-In Fire Alarm	$
* Rough-In Distributed Antenna System (DAS)	$
* Rough-In Security, Access, and Surveillance	$
* Rough-In Video Surveillance	$
* Rough-In Voice & Data Systems	$
* Rough-In Public Address & Music Systems	$
* Rough-In Audio/Visual	$
* Cable Tray for Low Voltage Systems	$
* Mechanical Connections	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* D5090 PV Arrays	$
* G4010 Transformers	$
* G4010 Generator - 80 kW	$
* D5030 Fire Alarm - Wiring & Devices	$
* D5030 Security Access & Surveillance - Wiring & Devices	$
* D5030 Video Surveillance - Wiring & Devices	$
* D5030 Clock & Paging System - Devices	$
* D5030 Voice & Data Systems - Wiring & Devices	$
* D5030 Public Address & Music Systems - Wiring & Devices	$
* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Heat Trace	$
* Hoisting / Rigging	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

BUILDING H - NEW SOUTH SHOP BUILDING:

* D5010 Power Service	$
* D5010 Power Distribution	$
* D5020 Light Fixtures & Controls - Purchase Only - All Other	$
* D5020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - All Other	$
* Rough-In Fire Alarm	$
* Rough-In Distributed Antenna System (DAS)	$
* Rough-In Security, Access, and Surveillance	$
* Rough-In Video Surveillance	$
* Rough-In Voice & Data Systems	$
* Rough-In Public Address & Music Systems	$
* Rough-In Audio/Visual	$
* Cable Tray for Low Voltage Systems	$
* Mechanical Connections	$
* D5090 PV Arrays	$
* G4010 Transformers	$
* G4010 Generator - 80 kW	$
* D5030 Fire Alarm - Wiring & Devices	$
* D5030 Security Access & Surveillance - Wiring & Devices	$
* D5030 Video Surveillance - Wiring & Devices	$
* D5030 Clock & Paging System - Devices	$
* D5030 Voice & Data Systems - Wiring & Devices	$
* D5030 Public Address & Music Systems - Wiring & Devices	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Heat Trace	$
* Hoisting / Rigging	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

BUILDING I - 1992 KBPS BUILDING:

* D5010 Power Service	$
* D5010 Power Distribution	$
* D5020 Light Fixtures & Controls - Purchase Only - All Other	$
* D5020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - All Other	$
* Rough-In Fire Alarm	$
* Rough-In Distributed Antenna System (DAS)	$
* Rough-In Security, Access, and Surveillance	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Rough-In Video Surveillance	$
* Rough-In Voice & Data Systems	$
* Rough-In Public Address & Music Systems	$
* Rough-In Audio/Visual	$
* Cable Tray for Low Voltage Systems	$
* Mechanical Connections	$
* D5090 Electromagnetic Shielding	$
* D5090 PV Arrays	$
* G4010 Transformers	$
* G4010 Generator - 80 kW	$
* D5030 Fire Alarm - Wiring & Devices	$
* D5030 Security Access & Surveillance - Wiring & Devices	$
* D5030 Video Surveillance - Wiring & Devices	$
* D5030 Clock & Paging System - Devices	$
* D5030 Voice & Data Systems - Wiring & Devices	$
* D5030 Public Address & Music Systems - Wiring & Devices	$
* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Building	$
* Sawcutting	$
* Seismic Bracing	$
* Firestopping	$
* Heat Trace	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Hoisting / Rigging	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

SITEWORK - ADA RAMP - BUCKMAN IMPROVEMENTS:

* D5010 Power Service	$
* D5010 Power Distribution	$
* D4020 Light Fixtures & Controls - Purchase Only - Site	$
* D4020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - Site	$
* G4010 Generator - 80 kW	$
* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Site (outside of building footprint)	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

SITEWORK - ON-SITE IMPROVEMENTS (WITHIN BENSON PROPERTY LINE):

* D5010 Power Service	$
* D5010 Power Distribution	$
* D4020 Light Fixtures & Controls - Purchase Only - Site	$
* D4020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - Site	$
* G4010 Generator - 80 kW	$
* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Site (outside of building footprint)	$
* Sawcutting	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

SITEWORK - ROW - RIGHT-OF-WAY IMPROVEMENTS:

* D5010 Power Service	$
* D5010 Power Distribution	$
* D4020 Light Fixtures & Controls - Purchase Only - Site	$
* D4020 Light Fixtures & Controls - Install Only (including receipt, inventory, coordination) - Site	$
* G4010 Generator - 80 kW	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Temp Electrical Service (does not include consumption)	$
* Temp Lighting (does not include consumption)	$
* Trenching & Backfill - Site (outside of building footprint)	$
* Trade Permits	$
* Design Fees for PV Scope	$
* General Conditions (See Cost Inclusions Matrix Tab)	$
* Anticipated Material Escalation (Labor Escalation Anticipated in Costs Above)	$
* Overhead & Profit	$
* Add performance and payment bond	$

Base Bid **$0.00**

ALTERNATES

* Alternate #4 - Reference Booklet p.19, item HVAC 11 - VRF system as described in ACCO VE 23-00 HVAC 11 in Z1010.30 Alternates.	$
* Alternate #5 - Reference Booklet p. 19, item HVAC 14 - VAV system ILO DOAS & Chilled Beams as described in ACCO VE 23-00 HVAC 14 in Z1010.30 Alternates.	$
* Alternate #6 - Reference Booklet p.21, item HVAC 01 - Reduce quantity of Chilled Beams as described in PAE VE 23-00 HVAC 01 in Z1010.30 Alternates.	$
* Alternate #7 - Reference Booklet p.22, item HVAC 44 - Remove VAV TUs and demand control ventilation from DAS units as described in ACCO VE 23-00 HVAC 44 in Z1010.30 Alternates.	$
* Alternate #8 - Reference Wood Window Restoration 02 - Reduce quantity of Chilled Beams as described in PAE VE 08-37 Wood Window Restoration 02, in Z1010.30 Alternates.	$
* Alternate #9 - Reference Booklet p.37, - Credit to pre-purchase equipment and / or lighting. Design Team agrees in so far as we can lock specifcations, quantities down for long lead items. Andersen to provide tariff / construction schedule coordination.	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* Alternate #10 - Reference Booklet p. 37 - Utilize wireless lighting controls. $

INCLUSIONS

Mark "yes" to all yes/no questions »

26-00 ELECTRICAL:

(ELECTRICAL) GENERAL ITEMS:

* (Electrical) The intent of this bid package is to contract with to assist with design and procurement of the scope of work described above. A limited notice to proceed for Preconstruction Services and/or design (as applies) will be issued, until the GMP contract is in place with the Owner-anticipated May/June 2021. Include breakdown on bid form for Preconstruction and/or Design (as applies) only, this amount will become both the initial contract value and the value that would be billed if project was canceled for any reason. ○ Yes ○ No

* (Electrical) This scope of work description is intended to be indicative of the work to be performed but is not intended to describe all work necessary for a complete job. It is intended that, except as specifically provided herein, there shall be no change orders for any work or features that could be reasonably inferred to be required from the Contract Documents. If any of the instructions in the Scope of Work is contradictory to the manufacturers' recommendations or violates any code, industry standard, or good practice, it is the responsibility of the Subcontractor to bring this to the attention of the Contractor prior to starting any part of that Scope of Work. Continued... ○ Yes ○ No

* (Electrical) ... Subcontractor is responsible to provide all design, materials, labor, supervision, tools, fasteners, adhesives, escalation and equipment necessary for a complete this scope of work in scope in strict accordance with Andersen Bid Documents, approved plans and specifications, and to bring to the Contractors attention any substantive work missing from this description including but not limited to the following ○ Yes ○ No

* (Electrical) Include Preconstruction Requirements as outlined on Preconstruction Service Requirements scoping, and project schedule for a general idea of project design & construction timing that is planned at this time. ○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) RFP Estimate should include all information shown on project documents and narratives issued by Bassetti & subconsultants. Additionally, include all requirements in PPS Design Standards, unless noted on Deviations from PPS Standards dated 8/19/19.	○ Yes ○ No
* (Electrical) Include BIM Requirements as outlined in Project Conditions, Attachment 5.6: BIM Execution Plan	○ Yes ○ No
* (Electrical) Costs of all applicable trade permits, fees, and licenses (other than general building permit) are provided by this Subcontractor. Includes cost of plan check fees, if applicable.	○ Yes ○ No
* (Electrical) Provide all design-build/engineered framing, seismic bracing, anchoring design, engineering & materials required to support this system, including, but not limited to beams, posts, blocking, hangers, I-joists, plywood, etc. This includes adjustment of floor joist layout for plumbing, electrical, HVAC shafts, and fire sprinkler needs. For existing building assumptions, refer to drawings marked "Record Drawings, for reference Only." If information is not defined on this set of drawings, facility is available for bidder walk-thru for some as built confirmation. Additional information may be available via select demolition depending on school schedule while occupied until June 2021, or during demolition defined in the project schedule. Include coordination of locations and special inspection of anchors.	○ Yes ○ No
* (Electrical) Subcontractor shall provide anchors to secure equipment or piping. Cast in anchors will be utilized as needed for new work, and all anchors are to be submitted on and approved by the Structural Engineer. In slab coordination of embedded items will need to be coordinated with other MEP trades, Fireproofing Subcontractor, and Concrete Subcontractor. There will be multiple mobilizations required to install slab inserts at all new slabs being poured at the various buildings on the GHS campus.	○ Yes ○ No
* (Electrical) Note that depending on the final design of the construction documents, seismic / expansion joints may be required at the junction of some of the structures. Contractor shall provide the required expansion and contraction joints in the system as required by code or AHJ.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Contractor is responsible to notify Andersen / Colas when Architectural review is required at various stages of construction as outlined in the spec.	◯ Yes	◯ No
* (Electrical) Any work in crawl space area will require special training. Refer to Project Conditions/Safety for additional information regarding confined space/potential hazardous materials (asbestos) in this area & training requirements. Include all costs for appropriate training and PPE in this scope of work.	◯ Yes	◯ No
* (Electrical) Includes all necessary coordination with other trades. Every effort will be made to conceal the piping, cabling, etc. within walls or soffits to limit the amount of visible MEP items.	◯ Yes	◯ No
* (Electrical) Subcontractor shall provide access panels as needed for access to this scope of work, to be installed by drywall contractor, this includes fire rated panels where required in rated assemblies.	◯ Yes	◯ No
* (Electrical) Subcontractor to furnish and install any required backing, miscellaneous embedments, hangers or supports necessary for support of Subcontractors materials or equipment.	◯ Yes	◯ No
* (Electrical) Includes all work required for mock-ups listed in the specifications/front end documents. Assume 1 Corridor Mock up and 1 Classroom mock up to be built in place for review/coordination (as early as feasible in the project).	◯ Yes	◯ No
* (Electrical) Provide all required videotaped training of the Owner's personnel in location, function, control and emergency procedures for all fire protection systems and the preventive and periodic maintenance, and emergency repair procedures. The time and location of this training shall be at the sole discretion of the Owner. In addition, provide an approximate thirty (30) minute video of all system, maintenance and operation. Provide a sign-up sheet to the Owner / Contractor of personnel that attended training.	◯ Yes	◯ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) A standard warranty as provided with warranty procedures as described in the contract documents. It is specifically noted and agreed that any equipment running before the date of acceptance shall not start the warranty period. Only the receipt of the occupancy permit and substantial completion certificate(s) shall start the warranty period. Includes the Letter of Conformance when all work is complete. Certain specifications require more that 1 year warranty, provide warranties that meet or exceed requirements in specs.	○ Yes ○ No
* (Electrical) Furnish and install all sleeves required in CMU and/or concrete. If sleeves required in the basement walls, include in your pricing for core drilling and link seal of piping through walls. Note that all link seals are to be installed from the inside face of any exterior foundation walls, so that they can be tightened up over time.	○ Yes ○ No
* (Electrical) Provide all required fire caulking / safing necessary to achieve cover approval from the appropriate inspection agencies fire sprinkler work. Include submittals for fire caulking / safing indicating the methods to be used at various sections of the structure. Fire caulking and safing to be provided in Andersen in accordance with the plans and specifications and governing authorities. Fire caulking at exposed concrete or non painted CMU wall areas shall be gray in color. Subcontractors will agree on one manufacturer to be used for the entire project by each trade.	○ Yes ○ No
* (Electrical) The Subcontractor shall provide sealant around work which passes through cored holes, sleeves, framed, or blocked-out openings, drywall, floors, roofs, exterior walls, etc., in Andersen with local codes and specification requirements. Subcontractor shall provide all caulking, fire safing, flashings, counter flashings putty pads or other materials required for sealing their own penetrations. This work shall ensure prevention from the passage of smoke, gas, and flame between wall and floors and leaking water at waterproof membranes, flashing and roofing. Fire caulking work shall be included within the rough-in schedule for each floor.	○ Yes ○ No
* (Electrical) Penetrations in slab and shear walls are allowed only within the restrictions of the Structural Engineer's design and review / approval.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) All drilling, boxing, blocking etc. required for this work is to be completed by this Subcontractor. No cutting of structural members shall be allowed without written approval from the Superintendent. The repair cost for any damage caused by unapproved alterations to any part of the structure shall be deducted from contract amount.	○ Yes ○ No
* (Electrical) Coordinate the location of all items with architectural and structural features (including trim, columns, tile, appliances, cabinets, mirrors, etc.). Any items installed that will not allow the installation of designed features will be corrected at no additional cost.	○ Yes ○ No
* (Electrical) Provide all required hoisting for your scope of work. Andersen will not have a crane or forklift on site for subcontractor use. Provide unloading of own material. No long term stock piling of material on site due to limitation of space. Short term storage to be approved by Andersen supervision upon request.	○ Yes ○ No
* (Electrical) Provide all acoustic, seismic and vibrations control as indicated in the project documents, governing authorities or as normally required for a complete system.	○ Yes ○ No
* (Electrical) Address in your proposal the method for this scope of work/system to remain operational prior to demolition & after demolition is complete. Since demolition will be performed by multiple companies, and in a phased fashion, include costs to install temporary isolation valves if necessary so that buildings and individual "sectors" can be isolated for shut off independently. Coordinate work as necessary with Demolition/Abatement contractors and/or local utility companies. It is intended to have utilities operational during the entire project construction. Some buildings/areas may be completed in advance of other buildings/areas and may need temporary utility feeds. Include the following components in your proposal. Participate in conversations & coordinate with local Fire Dept., PPS, Demo & Abatement contractors to facilitate this goal. Include new system coverage as early as possible with respects to Fire/Life Safety systems. Continued...	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) ... Include all costs to cut, cap, drain, etc. to prepare system for demolition by others. If your intent is to reuse any part of the existing system, please indicate on proposal form what components you intend to reuse. Include removal and salvage of items related to this system identified in demolition spec (If applies). a. Main Building (Sectors A, B, E, G1, G2, D, I) Isolated from Auditorium-Sector A for some of the work b. Demolition & Construction of New Sectors C, F, H c. Demolition of existing Auto shop d. Relocation of Fire Line (if required) by Civil Contractor e. Maintaining Service with Existing/New Hydrants as pertains to your scope of work. f. Maintaining Temp Power, Gas, Water, Waste as pertains to your scope of work	○ Yes ○ No
* (Electrical) Refer to Owner Salvage Listing for all items that are required to be salvaged on this project. Perform Salvage work for same items that are included in New work to be removed, packaged, and transferred to a storage location within 25 miles of jobsite.	○ Yes ○ No
* (Electrical) It is assumed that the scope of work for demolition and new construction for the Utility Trench(es) will be scoped with typical 5' rule for utilities by Plumbing, Waste, Fire. Assume Civil Contractor will install new utility trench and/or extensions if required. Exception: Electrical is assumed to be located in a separate utility trench (if not already indicated as direct bury) and will be completely furnished & installed (trench, conduit, wiring, etc.) by the electrical contractor if required.	○ Yes ○ No
* (Electrical) Be responsible for the start-up and commissioning of the fire protection system. Attend weekly commissioning coordination meetings, and complete all required start-up and commissioning test forms as required by the Commissioning Agency. Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (Electrical) Include all slab on grade demolition/excavation, and existing wall penetrations as needed to facilitate work included in this subcontract.	○ Yes ○ No
* (Electrical) Escalation: refer to RFP Instructions/Budget Breakdown form for price escalation requirements.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Include all requirements to safely handle lead/lead content shall be included in this scope of work, and performed by this contractor. Assume all existing surfaces include lead contaminates. A separate abatement contractor will not be hired to abate lead.	○ Yes ○ No
* (Electrical) Coordinate work, including layout for work to be performed by others regarding Asbestos abatement (must be performed by Abatement contractor).	○ Yes ○ No
* (Electrical) Incudes all required excavation and backfill for the plumbing underground scope of work for the remaining work on site drawings (within 5' of building) and for work under slab on grade. The slab on grade will be removed by others, trenching & piping placement is included in this scope of work, and includes layout of plumbing under slab utilities, including staking and pot-hole verifications.	○ Yes ○ No
* (Electrical) Provide line and grade for own work from grid lines and elevation bench marks provided by others.	○ Yes ○ No
* (Electrical) Include all requirements pertaining to this scope of work as indicated on LEED Score Card	○ Yes ○ No
* (Electrical) Price to include all welding required for your scope of work including protection of other trades work.	○ Yes ○ No
* (Electrical) Review scope of work below regarding temporary services to facilitate demolition and/or construction operations (trailer area and onsite requirements). Include all work, including planning, permitting, etc. for items that are temporary in nature to facilitate project. If design is required solely for temporary items, include in this scope of work.	○ Yes ○ No
* (Electrical) Portland Public School Standards have been provided for reference only. Include a scoping letter that states that your bid complies with every item in the PPS standards, and if not, provide a marked up version of the PPS standards explaining requested changes to match bid.	○ Yes ○ No
* (Electrical) It is understood that this project may exceed code minimum. If bidder would like to submit Value Engineering to provide code minimum, ONLY, specify item in spec/PPS standards and deviation that is proposed to reach code minimum ONLY.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Provide all identification markers, labels, tags and related signage per the contract documents and local code/AHJ.	○ Yes ○ No
* (Electrical) Coordinate with electrical contractor/designers for all power requirements related to your scope of work. Any changes caused by this subcontractor which affects the scope of the electrical firm will be the responsibility of this subcontractor.	○ Yes ○ No
* (Electrical) Coordinate the location of all items included in your scope of work with architectural and structural features (including trim, white boards, misc. wall mounted items, etc.). Any items installed that will not allow the installation of designed features will be corrected at no extra cost, provided that these design features were apparent at the time of installation.	○ Yes ○ No
* (Electrical) Provide all testing, sterilization and certification of all systems as required by contract documents or as required by governing authorities.	○ Yes ○ No
* (Electrical) Andersen will provide egress lighting (via electrical subcontractor scope), each contractor is responsible for their own task lighting.	○ Yes ○ No
* (Electrical) Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (Electrical) Subcontractor shall take field measurements of tight or congested areas prior to fabrication of materials. Modifications to the Subcontractor's work due to the Subcontractor's failure to field measure these key areas will be at the Subcontractor's expense. The use of the BIM coordination plan will be used to the greatest extent possible, however, due to timing of the Existing Conditions Building Scan, and incorporation into Revit, some items may require field verification to continue design/coordination without the scan fully available/incorporated.	○ Yes ○ No

(ELECTRICAL) SPECIFIC ITEMS:

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Provide all required labor, material, equipment, wiring, and devices for the Electrical system as described in Bid Package 26-00 Specifications. Includes all design, drawings, and start-up for a complete, functioning system. Please note this scope of work is Design Assist.	○ Yes ○ No
* (Electrical) All electrical items shall be installed in strict compliance with sound and fire requirements. All non-complying items will be removed and re-installed correctly at no extra cost.	○ Yes ○ No
* (Electrical) Provide all underground power, wire, conduit, smurf-tube, and embedded items in concrete. Provide pour watch as necessary. Conduit may be run in slab only within the restrictions of the Structural Engineer's design and review / approval.	○ Yes ○ No
* (Electrical) Provide nail plates where electrical work can be damaged by screws or nails.	○ Yes ○ No
* (Electrical) Any conduit not able to be run in the slab or any other structural element shall be run elsewhere (EMT or other type conduit). There shall be no change in cost for any necessary additional conduit route, or re-route	○ Yes ○ No
* (Electrical) Subcontractor shall coordinate with any off-site utility subcontractor(s) and appropriate utility company for location of supply and tie-in for electrical service.	○ Yes ○ No
* (Electrical) Provide all conduit stubs through the roof, penetrations shall be made weather tight and flashing or other materials required by the roofer to integrate into the roofing membrane system shall be furnished by the roofer for this scope of work.	○ Yes ○ No
* (Electrical) Subcontractor to includes all coordination, as required, with PGE for the installation of the primary and secondary conductors. Earthwork contractor to provide all of the primary conduit and related vaults. Electrical subcontractor to provide the secondary conduit from service vaults to the building switchgear including the trenching excavation and backfill. Trenching spoils not reused shall be exported off site.	○ Yes ○ No
* (Electrical) Subcontractor to provide all public and private light poles, grouting of pole base, wiring and fixtures. Include light pole bases, painting of light poles, etc.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Subcontractor to provide all light fixtures at exterior of buildings, exterior columns, decks, courtyards, trellises and canopies including related wiring. If Light fixture, or other electrical component is scheduled to remain, but must be removed in order for adjacent work to be performed, provide removal, storage and installation of item as needed.	○ Yes ○ No
* (Electrical) Subcontractor to provide site landscaping lighting, site electrical outlets, electrical for lights in seat walls, stair walls, etc. shown on the site drawings. Include all Light Poles, including light pole bases, painting, etc. as shown on drawings (includes, but is not limited to Civil drawings).	○ Yes ○ No
* (Electrical) Provide all wiring “not installed by franchise, private and public utility companies.” Include raceways & conduits for utilities as noted on plans.	○ Yes ○ No
* (Electrical) Provide all required ground fault wiring systems, detectors and emergency lighting, wiring & hook-up for fire smoke dampers and power circuiting and battery backup as required by code and governing agencies.	○ Yes ○ No
* (Electrical) Provide all power connections to all equipment shown on drawings, including but not limited to: HVAC equipment, Kitchen Equipment, Lab Equipment, etc.	○ Yes ○ No
* (Electrical) Provide Raceways for Low Voltage systems. The intent of this contract is to provide all pathways required for the other Low Voltage contractors to complete wiring and components under this contract (and future contract for AV). Raceways Include all conduit, sleeves, and back boxes for Tele Data, Fire Alarm, AV, Security, DAS and all other Low Voltage Scopes of work to be performed by others. Low Voltage Subcontractors will be required to supply drawing with locations off gridlines for sleeving, and other early rough in that is required for their scope of work to Electrical Subcontractor. Electrical Subcontractor will be required to communicate when information is required (well in advance of date needed on site), and coordinate sleeving with adjacent trades. Include raceway locations on Revit Model/BIM coordination. Note: Controls conduit can be excluded, provided by others (mechanical package)	○ Yes ○ No
(ELECTRICAL) HVAC WIRING - PROVIDE POWER WIRING FOR THE HVAC SYSTEMS, PER THE MECHANICAL DRAWINGS AND SPECIFICATIONS, INCLUDING BUT NOT LIMITED TO THE FOLLOWING:	
* (Electrical) Ventilation/exhaust fans.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Fans and/or air conditioning in the elevator machine rooms, sprinkler rooms, electrical rooms, and trash rooms.	◯ Yes	◯ No
* (Electrical) Heating, air conditioning, and ventilation systems.	◯ Yes	◯ No
* (Electrical) HVAC roof top units	◯ Yes	◯ No
* (Electrical) Subcontractor to coordinate all requirements for heating, ventilating and air conditioning equipment and include all devices, such as disconnects, and confirmed electrical service requirements with HVAC subcontractor, as necessary to provide a complete electrical installation. This scope to align with requirements in the mechanical-electrical coordination matrix.	◯ Yes	◯ No

(ELECTRICAL) ELEVATOR WIRING - PROVIDE THE POWER REQUIREMENTS FOR PASSENGER AND SERVICE ELEVATORS INCLUDING, BUT NOT LIMITED TO, THE FOLLOWING:

* (Electrical) All power required for the elevator if permanent power is not available at the beginning installations of the elevators than provide temporary provisions	◯ Yes	◯ No
* (Electrical) Work light with switch and power receptacle in the elevator pits and hoist way as required by governing authority.	◯ Yes	◯ No
* (Electrical) Service to elevator controller with hook-up for cab lighting.	◯ Yes	◯ No
* (Electrical) All single-phase receptacles shall have G.F.I. protection.	◯ Yes	◯ No
* (Electrical) All breakers, switches and disconnects as required by code and elevator manufacturer.	◯ Yes	◯ No

(ELECTRICAL) PROVIDE AND INSTALL ALL POWER-WIRING, BREAKERS AND HOOK-UP TO THE FOLLOWING MISCELLANEOUS ITEMS:

* (Electrical) Landscape controller(s), Include control wiring for Landscape Controller (must be run by lisc. Electrician).	◯ Yes	◯ No
* (Electrical) Garage doors, Coiling Doors, Security Gates – provide conduits for controls and low voltage wiring. Includes power point of connection and proximity card reader conduit and wiring	◯ Yes	◯ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Overhead power cord reels are assumed to be furnished, installed, mounted at ceiling level, supported (including engineering for same) as indicated on plans. This will be a design build element	○ Yes ○ No
* (Electrical) Electrical subcontractor is responsible for cross referencing plumbing and HVAC equipment schedules, as compared to electrical connections schedule on Assume that not all plumbing and mechanical equipment is shown on the electrical drawings.	○ Yes ○ No
* (Electrical) Electrical contractor to provide DAS signal survey during preconstruction process by licensed DAS company. Assist in evaluating facility to determine if signal strength already is weak enough to require DAS at full build out. Include in base bid conduit raceways for DAS system build out at a later date, provide alternate for full DAS build out.	○ Yes ○ No
* (Electrical) Lighting: Address in your proposal the budget for light fixtures only (Material cost only-refer to bid form). Please note: OLIghting will supply alternate options for various manufactures and Electrical Subcontractor will review options, provided pricing comparison & quantities including unit pricing/extension for review, comment. The light fixture package will be bid by the Electrical Subcontractor once the products have been selected, and evaluated for a competitive bid scenario.	○ Yes ○ No
* (Electrical) Provide generator, flex muffler fitting and the muffler. The fuel lines from the remote fuel station to the generator are excluded from Electrical Scope of work & included in plumbing contractor's scope of work (coordination of same is included). Coordinate Equipment pad with concrete contractor (pad supplied by others). Provide plan during preconstruction to modify all services to the Radio station over Summer 2020, so that work is complete prior to demolition starting approx. Summer 2021.	○ Yes ○ No

(ELECTRICAL) DEMOLITION/SALVAGE REQUIREMENTS: (REFER TO PPS PROVIDED SALVAGE LIST) FOR A COMPLETE LISTING, INCLUDING, BUT NOT LIMITED TO THE FOLLOWING:

* (Electrical) Contractor to disconnect the existing stand-by generator from service so that it can be hoisted out from its pad and given to the owner for salvage. This also includes removing the transfer switch from in the North Wing mechanical room for salvage to the Owner.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Contractor to disconnect all the Kiln's and pottery wheels from their electrical source for salvage to the Owner.	○ Yes	○ No
* (Electrical) Contractor to disconnect and remove all scoreboards to be salvaged to the Owner.	○ Yes	○ No
* (Electrical) Contractor to remove the master time clock and all American time clocks for salvage to the Owner.	○ Yes	○ No
* (Electrical) Contractor to remove speakers/PA System in the Old Gym for salvage to the Owner.	○ Yes	○ No
* (Electrical) Contractor to remove, refurbish, and reinstall light fixtures as indicated on project documents	○ Yes	○ No

(ELECTRICAL) TEMPORARY POWER, PHONE, INTERNET REQUIREMENTS:

(ELECTRICAL) GENERAL:

* (Electrical) Temporary Facilities are currently under development, a general list of requirements, based on a similar project is provided below to assist with budgeting process. MEP trades will assist in developing a final temp utility plan for the project. Each trade will be required to issue a narrative and drawing to demonstrate plan development and finalization. See attached Temporary Utility Service Assumptions Matrix and plan for general information/locations.	○ Yes	○ No
* (Electrical) In preparation of Demolition work starting Summer 2021, all trades will be requested to provide a plan for PREP work to occur during summer of 2020 to reduce the amount of time after building is vacated in summer 2021 to "make safe for demolition" activities completion. This early work will be issued as an early work authorization prior to GMP.	○ Yes	○ No
* (Electrical) All labor, supervision, materials, tools, equipment, fasteners, and adhesives as required to furnish install a complete system as outlined in the perspective bid package in accordance with all State Codes, Local Codes, NSC standards and jurisdictional codes & requirements, and in accordance with the contract documents.	○ Yes	○ No
* (Electrical) All trade specific required permits	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) With establishment of the construction schedule, establish schedule for implementation and termination of temporary power services for general construction activities and temporary facilities. Coordinate and meet as needed to coordinate power and lighting requirements and needs, including each phase of the construction schedule, and temporary power & lighting routing as required with Andersen / Colas. Review safety of the temporary power & lighting systems with Andersen / Colas safety representative, and provided required signage for such systems. At earliest feasible time and when acceptable to Owner and Architect, change over from use of temporary utility service to use of permanent service to enable removal of temporary services and to eliminate possible interference with completion of work.	○ Yes ○ No
* (Electrical) Inspect and test each service before placing temporary services in use. Arrange for required inspections and tests by governing authorities and obtain required certifications and permits for use. Inspect the power supply system from incoming gear to the spider boxes once a month. Report to Andersen and defects and results of monthly inspections.	○ Yes ○ No
* (Electrical) Operate temporary services in a safe and efficient manner. Do not overload temporary services and facilities and do not let them interfere with the progress of work.	○ Yes ○ No
* (Electrical) Should services of an independent engineer be required to survey existing and or temporary services, cost shall be included by contractor. Do not allow hazardous conditions to develop or persist at the site.	○ Yes ○ No

(ELECTRICAL) TEMPORARY UTILITIES:

* (Electrical) Engage local utility companies to install temporary service to project or to make connections to existing service. (Power and Phone/Internet).	○ Yes ○ No
* (Electrical) Arrange with companies, Owner, and Andersen for an acceptable time for service interruptions, where necessary, to make connections for temporary services.	○ Yes ○ No

(ELECTRICAL) TEMPORARY POWER:

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Provide each temporary electric service connections for all buildings as required to meet the project power needs. In addition provide temporary power at Temp. Construction Trailers locations. Maintain or expand as required and modify temporary electrical service requirements as needed throughout progress of work. Anticipate working with PGE to intercept the main feeder lines coming from power pole(s), and installing a sectionalizing cabinet in order to split power from the main feeder for power for field office trailers. Note that the existing feeder will need to remain in service early in the project, so provisions to continue the feed to the existing meter and transformers will need to be maintained, as this might serve as the power for building temporary power. Continued...	○ Yes ○ No
* (Electrical) ... Provide all equipment, meter, & vaults including transformers to bring power to the field office trailers, figure a total of 12 trailers, with (100amp, 120-240v/ single phase for trailers and 200amp, 120-240v/ single phase for double wide trailers, figure 4 double wide trailers) power requirements for each trailer and 2 flush toilet facilities. Provide 5 power poles with 10 high intensity lights for site lighting at the project entry, around the field office trailers, and at staging areas to be located at the direction of Andersen (reference site logistic plan).	○ Yes ○ No
* (Electrical) Include Power/ Telephone/Internet as applies to this scope for Two Andersen Colas. Assume the following for Work Stations/Wiring requirements: Trailer 1 (Primary Trailer): 30 Workstations*, 1 Fax Line & Power, 2 Telephone lines. Trailer 2: (Conference Room, Owner/Arch Trailer)- Conf room: 1 Phone, 3 Internet, 3 Power for Conf. room, 6 Workstations*. *Typical Workstation: 1 duplex outlet, 1 data connection, no phone requirement	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Provide temporary power distribution throughout the existing buildings and new buildings utilizing electrical skids (Blue Brutes or equal) which can be used for distributing power to spider boxes. Provide separated power supply for temporary power and temporary lighting, so that power outages for one does not affect the other. Potential options: 1). place the electrical skids on the roof and feed baloney cords down through the different levels of the building to the spider boxes. This might allow different buildings to be fed overhead high enough where excavation equipment could pass under the power lines. If this method is used, then figure that each skid would need to be relocated at least twice during roofing operations. 2). Locate the power skids in the corridors of any given floor and route the baloney cords up or down to the other floors for the spider boxes. Incorporate an alternate plan of direct bury or overhead power lines. Coordinate temporary set-up with Andersen.	○ Yes ○ No
* (Electrical) Provide weatherproof, grounded temporary electric power service and distribution system of sufficient size, capacity and power characteristics to accommodate performance of work during construction period for each building.	○ Yes ○ No
* (Electrical) Connect temporary service to local electric power system with procedures recommended by local power Representative.	○ Yes ○ No
* (Electrical) All damage to existing power systems created by Contractor shall be repaired by Contractor at no cost to Owner or General Contractor.	○ Yes ○ No
* (Electrical) Install service and grounding in compliance with NEC (NFPA 70). Include necessary meters, transformers, overload protected disconnect and main distribution switch gear.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Install electric power service underground except where overhead service must be used to avoid construction conflicts or to comply with governing regulations. All underground service must be located 3-foot deep, or as required by code, and shall have a "red" concrete covering where it is anticipated that other utility crossings might be excavated near power lines, and or red plastic locate markers at 20-foot intervals. Provide power poles that can support wiring high enough for construction equipment to pass under the lines safely when running power overhead from building to building.	○ Yes ○ No
* (Electrical) Provide power distribution system with overhead wiring and with vertical runs located where wiring is least likely to be exposed or damage or be in conflict with construction operations (main power distribution skid final locations shall be mutually agreed upon with Andersen superintendent at each building but shall be close to centralized within the footprint of each building)	○ Yes ○ No
* (Electrical) Exposed high voltage lines are to be run in EMT, or as required by code. Provide MC or equivalent raceways for lower voltages wiring which must be exposed on grade, floors, decks or other areas where damage is possible.	○ Yes ○ No
* (Electrical) Power for hand tools and task lighting (this is separate from Temporary lighting), provide power distribution “Spider Boxes” one minimum per 7,500 square feet on all floors at every level at every building, including one box for Mechanical and Kitchen areas. Provide options to protect baloney cords feeding spider boxes either from supporting from structure overhead, or by providing protective covers that scissors lifts can pass over, if the option of leaving the cords on the floors is utilized. Maintain these baloney cord protections throughout the project. Remove & replace any defective spider boxes or damaged cords from the project. Provide one box every 200 LF around the outside facade for exterior facade & immediate site work. Provide 2 boxes at the north parking lot, one box at the field trailers area, and one minimum per 7,500 square feet at exterior roof areas. Continued...	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) ... Boxes to be spaced in common areas and main building corridors. Boxes to be placed not to exceed a maximum distance of 100' from each other to allow the use of a 100' power cord to immediate work areas, with the exception of the boxes around the facade, which can be 200' feet apart, but run with 100' cords to offer the option of moving the spider boxes. Anticipate of min. of (4) temp. power cord distribution boxes. at the Auditorium stage and up in the attic space of the Auditorium. A separate power distribution box shall be required at each commercial kitchen area within the footprint of the Kitchen.	○ Yes ○ No
* (Electrical) Contractor, sub-contractors to provide their own grounded, U.L. approved extension cords.	○ Yes ○ No
* (Electrical) Contractor to make provisions for Temporary Heating up to 7 connections (480 volts / 3 phase / 60 Hz (3) 100 Amp	○ Yes ○ No
* (Electrical) Contractor to make provisions for Feeders for (480 volt / 3-phase, 30 50 amp each) for saw cutting, coring, grinding, & bead blasting floors. Contractor to make provisions for power (480 volt / 3-phase 50 amp) at each building, including 2 locations in the main building, for use in saw cutting, coring, grinding, and bead blasting of floors, etc. Contractor to wire in pigtails as required for the different equipment as needed, (pigtails to be supplied by others). If larger breakers are needed, contractor to provide the breakers and installation at additional cost. This provision at each building may be required at the roofs for roof striping equipment, then at other times inside the buildings.	○ Yes ○ No
* (Electrical) Radio Station Temporary Requirements: Refer to individual scopes for information	○ Yes ○ No
* (Electrical) Provide provisions for temp. power requirements for the installation of the buildings elevators included but not limited to the workman's car elevator. Include but not limited to temporary disconnects, premium work hours as required to work with and coordinate with elevator contractor. At some point we may use some of the spaces or swap some spare breaker space to 100 amp breakers to use for Elevators. We may need 3 at some point during construction.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Configuration of 480 panels with breakers sized accordingly for each building as noted above and also to include other line items as noted for Temp. power requirements by subcontractor. Additionally provide provisions for spares at distribution skids for additional temp. power requirements that may be needed due to unforeseen conditions or addition's to the project.	○ Yes ○ No
* (Electrical) 2 @ 20 amps – Spares	○ Yes ○ No
* (Electrical) 2 @ 30 amps – Spares	○ Yes ○ No
* (Electrical) 2 @ 40 amps – Spares	○ Yes ○ No
* (Electrical) 2 @ 60 amps – Spares	○ Yes ○ No
* (Electrical) 12 +/- spaces in 480V panel for extra breakers	○ Yes ○ No

(ELECTRICAL) TEMPORARY LIGHTING:

* (Electrical) Provide time clocked or photocell switching of temporary lighting, space to allow lighting to be turned off in patterns to conserve energy and retain light suitable for work in progress, access traffic, security check and project lock up	○ Yes ○ No
* (Electrical) Illuminate all hazardous areas. Keep safety and security lights burning dusk to dawn on time clocks or photocell to include but not limited to delivery areas, egress stairs at each building.	○ Yes ○ No
* (Electrical) Provide and maintain lighting for construction operations to achieve minimum lighting level of 5 10 foot candles at ALL egress paths and stairways in the building during work activities. LED string lighting in stairways wrapped up or following stair rail path is acceptable as long as it meets min. OSHA lighting levels for construction industry standards. Provide overhead light fixtures with protective baskets for corridor lighting, Contractor needs to plan to move the light fixtures as construction progresses without added expense to Andersen / Colas. No wobble lights are to be provided for site lighting, but may be used as task lighting by subcontractors, and will need to be turned off after each shift.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) The existing buildings have street lights that have been anchored to the parapet walls, and used for area lighting around the buildings. Andersen / Colas plans to maintain these lights during construction for site lighting around the buildings. The electrical contractor will need to provide labor to remove these light fixtures from the circuits that they are currently being fed from, and tie these light fixtures into the temporary power system being provided by the contractor. Plan this work so that the light fixtures are on outdoor rated cords, so that they can be moved during roofing and parapet operations. These lights are to be controlled as described above.	○ Yes ○ No
* (Electrical) Provide and maintain 1 watt/sq. ft. lighting on photocell to Exterior staging, Andersen and subcontractor trailer and storage areas for after hour security purposes. Staging areas are at exterior of buildings, as noted on the staging plans.	○ Yes ○ No
* (Electrical) Provide and maintain 0.25 watt/sq. ft. lighting to Interior work areas after dark for security purposes at corridors.	○ Yes ○ No
* (Electrical) Provide branch wiring from power source to distribution boxes with lighting conductors, pigtails and lamps as required.	○ Yes ○ No
* (Electrical) Maintain lighting and provide routine repairs. All lights are to have OSHA approved protective cages covering lamps.	○ Yes ○ No

(ELECTRICAL) OTHER:

* (Electrical) Ensure various zones of the buildings can be isolated from project to maintain or disconnect Power/Phone/Data as needed for construction phasing.	○ Yes ○ No
* (Electrical) Include Power/ Telephone/Internet as applies to this scope for Jobsite Office Trailers. Assume the following for Work Stations/Wiring requirements at the Colocation 50 Workstations*, 1 Fax Line & Power, 5 Telephone lines. *Typical Workstation: 1 duplex outlet, 1 data connection, no phone requirement	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Electrical) Refer to As built/Logistics plan for location of currently operational Radio Station. Portland Public Schools has an ongoing agreement for Radio station that must remain operational at all times. Provide protection as needed for existing feeds and adjacent work to proceed safety, without interruption to service. Power: Provide temporary power / permanent power to the Radio Station as part of this scope of work with one planned /coordinated shut down. Fiber: A complete as built is not known at this time. Include costs to research & coordinate fiber relocation for installation by the utility company during construction.

○ Yes ○ No

26-00.1 TELE DATA:

(TELE DATA) GENERAL ITEMS:

* (Tele Data) The intent of this bid package is to contract with to assist with design and procurement of the scope of work described above. A limited notice to proceed for Preconstruction Services and/or design (as applies) will be issued, until the GMP contract is in place with the Owner-anticipated May/June 2021. Include breakdown on bid form for Preconstruction and/or Design (as applies) only, this amount will become both the initial contract value and the value that would be billed if project was canceled for any reason.

○ Yes ○ No

* (Tele Data) This scope of work description is intended to be indicative of the work to be performed but is not intended to describe all work necessary for a complete job. It is intended that, except as specifically provided herein, there shall be no change orders for any work or features that could be reasonably inferred to be required from the Contract Documents. If any of the instructions in the Scope of Work is contradictory to the manufacturers' recommendations or violates any code, industry standard, or good practice, it is the responsibility of the Subcontractor to bring this to the attention of the Contractor prior to starting any part of that Scope of Work. Continued...

○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Tele Data) ... Subcontractor is responsible to provide all design, materials, labor, supervision, tools, fasteners, adhesives, escalation and equipment necessary for a complete this scope of work in scope in strict accordance with Andersen Bid Documents, approved plans and specifications, and to bring to the Contractors attention any substantive work missing from this description including but not limited to the following	○ Yes ○ No
* (Tele Data) Include Preconstruction Requirements as outlined on Preconstruction Service Requirements scoping, and project schedule for a general idea of project design & construction timing that is planned at this time.	○ Yes ○ No
* (Tele Data) RFP Estimate should include all information shown on project documents and narratives issued by Bassetti & subconsultants. Additionally, include all requirements in PPS Design Standards, unless noted on Deviations from PPS Standards dated 8/19/19.	○ Yes ○ No
* (Tele Data) Include BIM Requirements as outlined in Project Conditions, Attachment 5.6: BIM Execution Plan	○ Yes ○ No
* (Tele Data) Costs of all applicable trade permits, fees, and licenses (other than general building permit) are provided by this Subcontractor. Includes cost of plan check fees, if applicable.	○ Yes ○ No
* (Tele Data) Provide all design-build/engineered framing, seismic bracing, anchoring design, engineering & materials required to support this system, including, but not limited to beams, posts, blocking, hangers, I-joists, plywood, etc. This includes adjustment of floor joist layout for plumbing, electrical, HVAC shafts, and fire sprinkler needs. For existing building assumptions, refer to drawings marked "Record Drawings, for reference Only." If information is not defined on this set of drawings, facility is available for bidder walk-thru for some as built confirmation. Additional information may be available via select demolition depending on school schedule while occupied until June 2021, or during demolition defined in the project schedule. Include coordination of locations and special inspection of anchors.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Tele Data) Subcontractor shall provide anchors to secure equipment or piping. Cast in anchors will be utilized as needed for new work, and all anchors are to be submitted on and approved by the Structural Engineer. In slab coordination of embedded items will need to be coordinated with other MEP trades, Fireproofing Subcontractor, and Concrete Subcontractor. There will be multiple mobilizations required to install slab inserts at all new slabs being poured at the various buildings on the GHS campus.	○ Yes ○ No
* (Tele Data) Note that depending on the final design of the construction documents, seismic / expansion joints may be required at the junction of some of the structures. Contractor shall provide the required expansion and contraction joints in the system as required by code or AHJ.	○ Yes ○ No
* (Tele Data) Contractor is responsible to notify Andersen / Colas when Architectural review is required at various stages of construction as outlined in the spec.	○ Yes ○ No
* (Tele Data) Any work in crawl space area will require special training. Refer to Project Conditions/Safety for additional information regarding confined space/potential hazardous materials (asbestos) in this area & training requirements. Include all costs for appropriate training and PPE in this scope of work.	○ Yes ○ No
* (Tele Data) Includes all necessary coordination with other trades. Every effort will be made to conceal the piping, cabling, etc. within walls or soffits to limit the amount of visible MEP items.	○ Yes ○ No
* (Tele Data) Subcontractor shall provide access panels as needed for access to this scope of work, to be installed by drywall contractor, this includes fire rated panels where required in rated assemblies.	○ Yes ○ No
* (Tele Data) Subcontractor to furnish and install any required backing, miscellaneous embedments, hangers or supports necessary for support of Subcontractors materials or equipment.	○ Yes ○ No
* (Tele Data) Includes all work required for mock-ups listed in the specifications/front end documents. Assume 1 Corridor Mock up and 1 Classroom mock up to be built in place for review/coordination (as early as feasible in the project).	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Tele Data) Provide all required videotaped training of the Owner's personnel in location, function, control and emergency procedures for all fire protection systems and the preventive and periodic maintenance, and emergency repair procedures. The time and location of this training shall be at the sole discretion of the Owner. In addition, provide an approximate thirty (30) minute video of all system, maintenance and operation. Provide a sign-up sheet to the Owner / Contractor of personnel that attended training.	○ Yes ○ No
* (Tele Data) A standard warranty as provided with warranty procedures as described in the contract documents. It is specifically noted and agreed that any equipment running before the date of acceptance shall not start the warranty period. Only the receipt of the occupancy permit and substantial completion certificate(s) shall start the warranty period. Includes the Letter of Conformance when all work is complete. Certain specifications require more that 1 year warranty, provide warranties that meet or exceed requirements in specs.	○ Yes ○ No
* (Tele Data) Furnish and install all sleeves required in CMU and/or concrete. If sleeves required in the basement walls, include in your pricing for core drilling and link seal of piping through walls. Note that all link seals are to be installed from the inside face of any exterior foundation walls, so that they can be tightened up over time.	○ Yes ○ No
* (Tele Data) Provide all required fire caulking / safing necessary to achieve cover approval from the appropriate inspection agencies fire sprinkler work. Include submittals for fire caulking / safing indicating the methods to be used at various sections of the structure. Fire caulking and safing to be provided in Andersen in accordance with the plans and specifications and governing authorities. Fire caulking at exposed concrete or non painted CMU wall areas shall be gray in color. Subcontractors will agree on one manufacturer to be used for the entire project by each trade.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Tele Data) The Subcontractor shall provide sealant around work which passes through cored holes, sleeves, framed, or blocked-out openings, drywall, floors, roofs, exterior walls, etc., in Andersen with local codes and specification requirements. Subcontractor shall provide all caulking, fire safing, flashings, counter flashings putty pads or other materials required for sealing their own penetrations. This work shall ensure prevention from the passage of smoke, gas, and flame between wall and floors and leaking water at waterproof membranes, flashing and roofing. Fire caulking work shall be included within the rough-in schedule for each floor.	○ Yes	○ No
* (Tele Data) Penetrations in slab and shear walls are allowed only within the restrictions of the Structural Engineer's design and review / approval.	○ Yes	○ No
* (Tele Data) All drilling, boxing, blocking etc. required for this work is to be completed by this Subcontractor. No cutting of structural members shall be allowed without written approval from the Superintendent. The repair cost for any damage caused by unapproved alterations to any part of the structure shall be deducted from contract amount.	○ Yes	○ No
* (Tele Data) Coordinate the location of all items with architectural and structural features (including trim, columns, tile, appliances, cabinets, mirrors, etc.). Any items installed that will not allow the installation of designed features will be corrected at no additional cost.	○ Yes	○ No
* (Tele Data) Provide all required hoisting for your scope of work. Andersen will not have a crane or forklift on site for subcontractor use. Provide unloading of own material. No long term stock piling of material on site due to limitation of space. Short term storage to be approved by Andersen supervision upon request.	○ Yes	○ No
* (Tele Data) Provide all acoustic, seismic and vibrations control as indicated in the project documents, governing authorities or as normally required for a complete system.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Tele Data) Address in your proposal the method for this scope of work/system to remain operational prior to demolition & after demolition is complete. Since demolition will be performed by multiple companies, and in a phased fashion, include costs to install temporary isolation valves if necessary so that buildings and individual "sectors" can be isolated for shut off independently. Coordinate work as necessary with Demolition/Abatement contractors and/or local utility companies. It is intended to have utilities operational during the entire project construction. Some buildings/areas may be completed in advance of other buildings/areas and may need temporary utility feeds. Include the following components in your proposal. Participate in conversations & coordinate with local Fire Dept., PPS, Demo & Abatement contractors to facilitate this goal. Continued...	◯ Yes	◯ No
* (Tele Data) ... Include new system coverage as early as possible with respects to Fire/Life Safety systems. Include all costs to cut, cap, drain, etc. to prepare system for demolition by others. If your intent is to reuse any part of the existing system, please indicate on proposal form what components you intend to reuse. Include removal and salvage of items related to this system identified in demolition spec (If applies). a. Main Building (Sectors A, B, E, G1, G2, D, I) Isolated from Auditorium-Sector A for some of the work b. Demolition & Construction of New Sectors C, F, H c. Demolition of existing Auto shop d. Relocation of Fire Line (if required) by Civil Contractor e. Maintaining Service with Existing/New Hydrants as pertains to your scope of work. f. Maintaining Temp Power, Gas, Water, Waste as pertains to your scope of work	◯ Yes	◯ No
* (Tele Data) Refer to Owner Salvage Listing for all items that are required to be salvaged on this project. Perform Salvage work for same items that are included in New work to be removed, packaged, and transferred to a storage location within 25 miles of jobsite.	◯ Yes	◯ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Tele Data) It is assumed that the scope of work for demolition and new construction for the Utility Trench(es) will be scoped with typical 5' rule for utilities by Plumbing, Waste, Fire. Assume Civil Contractor will install new utility trench and/or extensions if required. Exception: Electrical is assumed to be located in a separate utility trench (if not already indicated as direct bury) and will be completely furnished & installed (trench, conduit, wiring, etc.) by the electrical contractor if required.	○ Yes ○ No
* (Tele Data) Be responsible for the start-up and commissioning of the fire protection system. Attend weekly commissioning coordination meetings, and complete all required start-up and commissioning test forms as required by the Commissioning Agency. Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (Tele Data) Include all slab on grade demolition/excavation, and existing wall penetrations as needed to facilitate work included in this subcontract.	○ Yes ○ No
* (Tele Data) Escalation: refer to RFP Instructions/Budget Breakdown form for price escalation requirements.	○ Yes ○ No
* (Tele Data) Include all requirements to safely handle lead/lead content shall be included in this scope of work, and performed by this contractor. Assume all existing surfaces include lead contaminates. A separate abatement contractor will not be hired to abate lead.	○ Yes ○ No
* (Tele Data) Coordinate work, including layout for work to be performed by others regarding Asbestos abatement (must be performed by Abatement contractor).	○ Yes ○ No
* (Tele Data) Incudes all required excavation and backfill for the plumbing underground scope of work for the remaining work on site drawings (within 5' of building) and for work under slab on grade. The slab on grade will be removed by others, trenching & piping placement is included in this scope of work, and includes layout of plumbing under slab utilities, including staking and pot-hole verifications.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Tele Data) Provide line and grade for own work from grid lines and elevation bench marks provided by others.	○ Yes	○ No
* (Tele Data) Include all requirements pertaining to this scope of work as indicated on LEED Score Card	○ Yes	○ No
* (Tele Data) Price to include all welding required for your scope of work including protection of other trades work.	○ Yes	○ No
* (Tele Data) Review scope of work below regarding temporary services to facilitate demolition and/or construction operations (trailer area and onsite requirements). Include all work, including planning, permitting, etc. for items that are temporary in nature to facilitate project. If design is required solely for temporary items, include in this scope of work.	○ Yes	○ No
* (Tele Data) Portland Public School Standards have been provided for reference only. Include a scoping letter that states that your bid complies with every item in the PPS standards, and if not, provide a marked up version of the PPS standards explaining requested changes to match bid.	○ Yes	○ No
* (Tele Data) It is understood that this project may exceed code minimum. If bidder would like to submit Value Engineering to provide code minimum, ONLY, specify item in spec/PPS standards and deviation that is proposed to reach code minimum ONLY.	○ Yes	○ No
* (Tele Data) Provide all identification markers, labels, tags and related signage per the contract documents and local code/AHJ.	○ Yes	○ No
* (Tele Data) Coordinate with electrical contractor/designers for all power requirements related to your scope of work. Any changes caused by this subcontractor which affects the scope of the electrical firm will be the responsibility of this subcontractor.	○ Yes	○ No
* (Tele Data) Coordinate the location of all items included in your scope of work with architectural and structural features (including trim, white boards, misc. wall mounted items, etc.). Any items installed that will not allow the installation of designed features will be corrected at no extra cost, provided that these design features were apparent at the time of installation.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Tele Data) Provide all testing, sterilization and certification of all systems as required by contract documents or as required by governing authorities.	○ Yes ○ No
* (Tele Data) Andersen will provide egress lighting (via electrical subcontractor scope), each contractor is responsible for their own task lighting.	○ Yes ○ No
* (Tele Data) Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (Tele Data) Subcontractor shall take field measurements of tight or congested areas prior to fabrication of materials. Modifications to the Subcontractor's work due to the Subcontractor's failure to field measure these key areas will be at the Subcontractor's expense. The use of the BIM coordination plan will be used to the greatest extent possible, however, due to timing of the Existing Conditions Building Scan, and incorporation into Revit, some items may require field verification to continue design/coordination without the scan fully available/incorporated.	○ Yes ○ No

(TELE DATA) SPECIFIC ITEMS:

* (Tele Data) Provide all required labor, material, equipment, wiring, and devices for the Tele/Data system as described in Bid Package 26-12 Tele/data Specifications. Includes all design, drawings, and start-up for a complete, functioning system. Please note this scope is Design Assist.	○ Yes ○ No
* (Tele Data) Provide all required labor, material, equipment, wiring, and devices for the Security system as described in Division 28: Electronic Safety & Security Basic Req, Access Control & Intrusion Detection, Video Surveillance. Includes all design, drawings, and start-up for a complete, functioning system	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Tele Data) Coordinate raceways for Low Voltage systems provided in the Electrical Scope of work. Low Voltage coordination includes supplying drawing with locations off gridlines for sleeving, and other early rough in that is required for their scope of work to Electrical Subcontractor. Electrical Subcontractor will be required to communicate when information is required (well in advance of date needed on site), and coordinate sleeving with adjacent trades. Include raceway locations on Revit Model/BIM coordination. Note: Controls conduit can be excluded, provided by others (mechanical package)	○ Yes ○ No
* (Tele Data) BIM requirements for this scope of work are limited to providing information for the Div. 26 electrical contractor to represent in the model (supply CAD documents to Div. 26 contractor). Attend clash detection meetings to resolve issues with this scope of work (modify shop drawings as needed, and communicate with the Div. 26 subcontractor)	○ Yes ○ No
* (Tele Data) Include in design assist scoping review, coordination, discussion and meetings regarding adjacent scope coordination, including, but not limited to: Door Hardware, Power Supplies, Mounting locations, Mounting Devices, etc.	○ Yes ○ No
* (Tele Data) It is assumed that sleeving that is installed by Electrical Subcontractor will be an empty raceway that will be require a rated fire penetration to be supplied by this subcontractor after cabling has been installed. Install all fire rating in a neat and workman like manner. Subcontractor trades will choose one manufacture for all fire rated penetrations to use on project (Hilti, 3M, etc.).	○ Yes ○ No

(TELE DATA) TEMPORARY SERVICES:

(TELE DATA) GENERAL:

* (Tele Data) Temporary Facilities are currently under development, a general list of requirements, based on a similar project is provided below to assist with budgeting process. MEP trades will assist in developing a final temp utility plan for the project. Each trade will be required to issue a narrative and drawing to demonstrate plan development and finalization. See attached Temporary Utility Service Assumptions Matrix and plan for general information/locations.	○ Yes ○ No

* (Tele Data) In preparation of Demolition work starting Summer 2021, all trades will be requested to provide a plan for PREP work to occur during summer of 2020 to reduce the amount of time after building is vacated in summer 2021 to "make safe for demolition" activities completion. This early work will be issued as an early work authorization prior to GMP.	○ Yes ○ No
* (Tele Data) All labor, supervision, materials, tools, equipment, fasteners, and adhesives as required to furnish install a complete system as outlined in the perspective bid package in accordance with all State Codes, Local Codes, NSC standards and jurisdictional codes & requirements, and in accordance with the contract documents.	○ Yes ○ No
* (Tele Data) Include all trade specific permits.	○ Yes ○ No
* (Tele Data) Inspect and test each service before placing temporary services in use. Arrange for required inspections and tests by governing authorities and obtain required certifications and permits for use. Inspect the power supply system from incoming gear to the spider boxes once a month. Report to Andersen and defects and results of monthly inspections.	○ Yes ○ No
* (Tele Data) Operate temporary services in a safe and efficient manner. Do not overload temporary services and facilities and do not let them interfere with the progress of work.	○ Yes ○ No
* (Tele Data) Should services of an independent engineer be required to survey existing and or temporary services, cost shall be included by contractor. Do not allow hazardous conditions to develop or persist at the site.	○ Yes ○ No

(TELE DATA) TEMPORARY UTILITIES:

* (Tele Data) Engage local utility companies to install temporary service to project or to make connections to existing service.	○ Yes ○ No
* (Tele Data) Arrange with companies, Owner, and Andersen for an acceptable time for service interruptions, where necessary, to make connections for temporary services.	○ Yes ○ No
* (Tele Data) Maintain service to Radio Station (Building I) to the greatest extent possible. Coordinate shutdowns as required.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Tele Data) Include Power/ Telephone/Internet as applies to this scope for Jobsite Office Trailers. Assume the following for Work Stations/Wiring requirements at the Colocation 50 Workstations*, 1 Fax Line & Power, 5 Telephone lines. *Typical Workstation: 1 duplex outlet, 1 data connection, no phone requirement — ○ Yes ○ No

26-00.2 FIRE DETECTION & ALARM-DESIGN BUILD:

(FIRE ALARM) GENERAL ITEMS:

* (Fire Alarm) The intent of this bid package is to contract with to assist with design and procurement of the scope of work described above. A limited notice to proceed for Preconstruction Services and/or design (as applies) will be issued, until the GMP contract is in place with the Owner-anticipated May/June 2021. Include breakdown on bid form for Preconstruction and/or Design (as applies) only, this amount will become both the initial contract value and the value that would be billed if project was canceled for any reason. — ○ Yes ○ No

* (Fire Alarm) This scope of work description is intended to be indicative of the work to be performed but is not intended to describe all work necessary for a complete job. It is intended that, except as specifically provided herein, there shall be no change orders for any work or features that could be reasonably inferred to be required from the Contract Documents. If any of the instructions in the Scope of Work is contradictory to the manufacturers' recommendations or violates any code, industry standard, or good practice, it is the responsibility of the Subcontractor to bring this to the attention of the Contractor prior to starting any part of that Scope of Work. Continued... — ○ Yes ○ No

* (Fire Alarm) ... Subcontractor is responsible to provide all design, materials, labor, supervision, tools, fasteners, adhesives, escalation and equipment necessary for a complete this scope of work in scope in strict accordance with Andersen Bid Documents, approved plans and specifications, and to bring to the Contractors attention any substantive work missing from this description including but not limited to the following — ○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Fire Alarm) Include Preconstruction Requirements as outlined on Preconstruction Service Requirements scoping, and project schedule for a general idea of project design & construction timing that is planned at this time.	○ Yes ○ No
* (Fire Alarm) RFP Estimate should include all information shown on project documents and narratives issued by Bassetti & subconsultants. Additionally, include all requirements in PPS Design Standards, unless noted on Deviations from PPS Standards dated 8/19/19.	○ Yes ○ No
* (Fire Alarm) Include BIM Requirements as outlined in Project Conditions, Attachment 5.6: BIM Execution Plan	○ Yes ○ No
* (Fire Alarm) Costs of all applicable trade permits, fees, and licenses (other than general building permit) are provided by this Subcontractor. Includes cost of plan check fees, if applicable.	○ Yes ○ No
* (Fire Alarm) Provide all design-build/engineered framing, seismic bracing, anchoring design, engineering & materials required to support this system, including, but not limited to beams, posts, blocking, hangers, I-joists, plywood, etc. This includes adjustment of floor joist layout for plumbing, electrical, HVAC shafts, and fire sprinkler needs. For existing building assumptions, refer to drawings marked "Record Drawings, for reference Only." If information is not defined on this set of drawings, facility is available for bidder walk-thru for some as built confirmation. Additional information may be available via select demolition depending on school schedule while occupied until June 2021, or during demolition defined in the project schedule. Include coordination of locations and special inspection of anchors.	○ Yes ○ No
* (Fire Alarm) Subcontractor shall provide anchors to secure equipment or piping. Cast in anchors will be utilized as needed for new work, and all anchors are to be submitted on and approved by the Structural Engineer. In slab coordination of embedded items will need to be coordinated with other MEP trades, Fireproofing Subcontractor, and Concrete Subcontractor. There will be multiple mobilizations required to install slab inserts at all new slabs being poured at the various buildings on the GHS campus.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Fire Alarm) Note that depending on the final design of the construction documents, seismic / expansion joints may be required at the junction of some of the structures. Contractor shall provide the required expansion and contraction joints in the system as required by code or AHJ.	○ Yes ○ No
* (Fire Alarm) Contractor is responsible to notify Andersen / Colas when Architectural review is required at various stages of construction as outlined in the spec.	○ Yes ○ No
* (Fire Alarm) Any work in crawl space area will require special training. Refer to Project Conditions/Safety for additional information regarding confined space/potential hazardous materials (asbestos) in this area & training requirements. Include all costs for appropriate training and PPE in this scope of work.	○ Yes ○ No
* (Fire Alarm) Includes all necessary coordination with other trades. Every effort will be made to conceal the piping, cabling, etc. within walls or soffits to limit the amount of visible MEP items.	○ Yes ○ No
* (Fire Alarm) Subcontractor shall provide access panels as needed for access to this scope of work, to be installed by drywall contractor, this includes fire rated panels where required in rated assemblies.	○ Yes ○ No
* (Fire Alarm) Subcontractor to furnish and install any required backing, miscellaneous embedments, hangers or supports necessary for support of Subcontractors materials or equipment.	○ Yes ○ No
* (Fire Alarm) Includes all work required for mock-ups listed in the specifications/front end documents. Assume 1 Corridor Mock up and 1 Classroom mock up to be built in place for review/coordination (as early as feasible in the project).	○ Yes ○ No
* (Fire Alarm) Provide all required videotaped training of the Owner's personnel in location, function, control and emergency procedures for all fire protection systems and the preventive and periodic maintenance, and emergency repair procedures. The time and location of this training shall be at the sole discretion of the Owner. In addition, provide an approximate thirty (30) minute video of all system, maintenance and operation. Provide a sign-up sheet to the Owner / Contractor of personnel that attended training.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Fire Alarm) A standard warranty as provided with warranty procedures as described in the contract documents. It is specifically noted and agreed that any equipment running before the date of acceptance shall not start the warranty period. Only the receipt of the occupancy permit and substantial completion certificate(s) shall start the warranty period. Includes the Letter of Conformance when all work is complete. Certain specifications require more that 1 year warranty, provide warranties that meet or exceed requirements in specs.	○ Yes ○ No
* (Fire Alarm) Furnish and install all sleeves required in CMU and/or concrete. If sleeves required in the basement walls, include in your pricing for core drilling and link seal of piping through walls. Note that all link seals are to be installed from the inside face of any exterior foundation walls, so that they can be tightened up over time.	○ Yes ○ No
* (Fire Alarm) Provide all required fire caulking / safing necessary to achieve cover approval from the appropriate inspection agencies fire sprinkler work. Include submittals for fire caulking / safing indicating the methods to be used at various sections of the structure. Fire caulking and safing to be provided in Andersen in accordance with the plans and specifications and governing authorities. Fire caulking at exposed concrete or non painted CMU wall areas shall be gray in color. Subcontractors will agree on one manufacturer to be used for the entire project by each trade.	○ Yes ○ No
* (Fire Alarm) The Subcontractor shall provide sealant around work which passes through cored holes, sleeves, framed, or blocked-out openings, drywall, floors, roofs, exterior walls, etc., in Andersen with local codes and specification requirements. Subcontractor shall provide all caulking, fire safing, flashings, counter flashings putty pads or other materials required for sealing their own penetrations. This work shall ensure prevention from the passage of smoke, gas, and flame between wall and floors and leaking water at waterproof membranes, flashing and roofing. Fire caulking work shall be included within the rough-in schedule for each floor.	○ Yes ○ No
* (Fire Alarm) Penetrations in slab and shear walls are allowed only within the restrictions of the Structural Engineer's design and review / approval.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Fire Alarm) All drilling, boxing, blocking etc. required for this work is to be completed by this Subcontractor. No cutting of structural members shall be allowed without written approval from the Superintendent. The repair cost for any damage caused by unapproved alterations to any part of the structure shall be deducted from contract amount.	○ Yes ○ No
* (Fire Alarm) Coordinate the location of all items with architectural and structural features (including trim, columns, tile, appliances, cabinets, mirrors, etc.). Any items installed that will not allow the installation of designed features will be corrected at no additional cost.	○ Yes ○ No
* (Fire Alarm) Provide all required hoisting for your scope of work. Andersen will not have a crane or forklift on site for subcontractor use. Provide unloading of own material. No long term stock piling of material on site due to limitation of space. Short term storage to be approved by Andersen supervision upon request.	○ Yes ○ No
* (Fire Alarm) Provide all acoustic, seismic and vibrations control as indicated in the project documents, governing authorities or as normally required for a complete system.	○ Yes ○ No
* (Fire Alarm) Address in your proposal the method for this scope of work/system to remain operational prior to demolition & after demolition is complete. Since demolition will be performed by multiple companies, and in a phased fashion, include costs to install temporary isolation valves if necessary so that buildings and individual "sectors" can be isolated for shut off independently. Coordinate work as necessary with Demolition/Abatement contractors and/or local utility companies. It is intended to have utilities operational during the entire project construction. Some buildings/areas may be completed in advance of other buildings/areas and may need temporary utility feeds. Include the following components in your proposal. Participate in conversations & coordinate with local Fire Dept., PPS, Demo & Abatement contractors to facilitate this goal. Include new system coverage as early as possible with respects to Fire/Life Safety systems. Continued...	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Fire Alarm) ... Include all costs to cut, cap, drain, etc. to prepare system for demolition by others. If your intent is to reuse any part of the existing system, please indicate on proposal form what components you intend to reuse. Include removal and salvage of items related to this system identified in demolition spec (If applies). a. Main Building (Sectors A, B, E, G1, G2, D, I) Isolated from Auditorium-Sector A for some of the work b. Demolition & Construction of New Sectors C, F, H c. Demolition of existing Auto shop d. Relocation of Fire Line (if required) by Civil Contractor e. Maintaining Service with Existing/New Hydrants as pertains to your scope of work. f. Maintaining Temp Power, Gas, Water, Waste as pertains to your scope of work	○ Yes ○ No
* (Fire Alarm) Refer to Owner Salvage Listing for all items that are required to be salvaged on this project. Perform Salvage work for same items that are included in New work to be removed, packaged, and transferred to a storage location within 25 miles of jobsite.	○ Yes ○ No
* (Fire Alarm) It is assumed that the scope of work for demolition and new construction for the Utility Trench(es) will be scoped with typical 5' rule for utilities by Plumbing, Waste, Fire. Assume Civil Contractor will install new utility trench and/or extensions if required. Exception: Electrical is assumed to be located in a separate utility trench (if not already indicated as direct bury) and will be completely furnished & installed (trench, conduit, wiring, etc.) by the electrical contractor if required.	○ Yes ○ No
* (Fire Alarm) Be responsible for the start-up and commissioning of the fire protection system. Attend weekly commissioning coordination meetings, and complete all required start-up and commissioning test forms as required by the Commissioning Agency. Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (Fire Alarm) Include all slab on grade demolition/excavation, and existing wall penetrations as needed to facilitate work included in this subcontract.	○ Yes ○ No
* (Fire Alarm) Escalation: refer to RFP Instructions/Budget Breakdown form for price escalation requirements.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Fire Alarm) Include all requirements to safely handle lead/lead content shall be included in this scope of work, and performed by this contractor. Assume all existing surfaces include lead contaminates. A separate abatement contractor will not be hired to abate lead.	○ Yes	○ No
* (Fire Alarm) Coordinate work, including layout for work to be performed by others regarding Asbestos abatement (must be performed by Abatement contractor).	○ Yes	○ No
* (Fire Alarm) Incudes all required excavation and backfill for the plumbing underground scope of work for the remaining work on site drawings (within 5' of building) and for work under slab on grade. The slab on grade will be removed by others, trenching & piping placement is included in this scope of work, and includes layout of plumbing under slab utilities, including staking and pot-hole verifications.	○ Yes	○ No
* (Fire Alarm) Provide line and grade for own work from grid lines and elevation bench marks provided by others.	○ Yes	○ No
* (Fire Alarm) Include all requirements pertaining to this scope of work as indicated on LEED Score Card	○ Yes	○ No
* (Fire Alarm) Price to include all welding required for your scope of work including protection of other trades work.	○ Yes	○ No
* (Fire Alarm) Review scope of work below regarding temporary services to facilitate demolition and/or construction operations (trailer area and onsite requirements). Include all work, including planning, permitting, etc. for items that are temporary in nature to facilitate project. If design is required solely for temporary items, include in this scope of work.	○ Yes	○ No
* (Fire Alarm) Portland Public School Standards have been provided for reference only. Include a scoping letter that states that your bid complies with every item in the PPS standards, and if not, provide a marked up version of the PPS standards explaining requested changes to match bid.	○ Yes	○ No
* (Fire Alarm) It is understood that this project may exceed code minimum. If bidder would like to submit Value Engineering to provide code minimum, ONLY, specify item in spec/PPS standards and deviation that is proposed to reach code minimum ONLY.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Fire Alarm) Provide all identification markers, labels, tags and related signage per the contract documents and local code/AHJ.	○ Yes ○ No
* (Fire Alarm) Coordinate with electrical contractor/designers for all power requirements related to your scope of work. Any changes caused by this subcontractor which affects the scope of the electrical firm will be the responsibility of this subcontractor.	○ Yes ○ No
* (Fire Alarm) Coordinate the location of all items included in your scope of work with architectural and structural features (including trim, white boards, misc. wall mounted items, etc.). Any items installed that will not allow the installation of designed features will be corrected at no extra cost, provided that these design features were apparent at the time of installation.	○ Yes ○ No
* (Fire Alarm) Provide all testing, sterilization and certification of all systems as required by contract documents or as required by governing authorities.	○ Yes ○ No
* (Fire Alarm) Andersen will provide egress lighting (via electrical subcontractor scope), each contractor is responsible for their own task lighting.	○ Yes ○ No
* (Fire Alarm) Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (Fire Alarm) Subcontractor shall take field measurements of tight or congested areas prior to fabrication of materials. Modifications to the Subcontractor's work due to the Subcontractor's failure to field measure these key areas will be at the Subcontractor's expense. The use of the BIM coordination plan will be used to the greatest extent possible, however, due to timing of the Existing Conditions Building Scan, and incorporation into Revit, some items may require field verification to continue design/coordination without the scan fully available/incorporated.	○ Yes ○ No

(FIRE ALARM) SPECIFIC ITEMS:

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Fire Alarm) Provide all required labor, material, equipment, wiring, and devices for the Fire Alarm system as described in Bid Package 26-15 Fire Alarm Specifications. Includes all design, drawings, and start-up for a complete, functioning system. Please note this scope is Design Build.	○ Yes ○ No

(FIRE ALARM) FIRE ALARM - PROVIDE ALL DESIGN & ENGINEERING, WIRING, DEVICES, PROGRAMMING, AND TESTING FOR COMPLETE, CODE COMPLIANT, FUNCTIONAL FIRE ALARM SYSTEM. INCLUDES, BUT IS NOT LIMITED TO:

* (Fire Alarm) All required heat detectors and shunt trip required at elevators.	○ Yes ○ No
* (Fire Alarm) All smoke detection at elevator lobbies and elevator recall requirements.	○ Yes ○ No
* (Fire Alarm) All smoke control electronics.	○ Yes ○ No
* (Fire Alarm) Fireman's override smoke control panel at fire command center.	○ Yes ○ No
* (Fire Alarm) Speakers in elevator cars.	○ Yes ○ No
* (Fire Alarm) Remote central station dial out.	○ Yes ○ No
* (Fire Alarm) All required fire alarm system drawings and permits.	○ Yes ○ No
* (Fire Alarm) All fire alarm control panels (with dialer and batteries).	○ Yes ○ No
* (Fire Alarm) Annunciators	○ Yes ○ No
* (Fire Alarm) Power supplies	○ Yes ○ No
* (Fire Alarm) Manual pull stations	○ Yes ○ No
* (Fire Alarm) All horn strobes, speaker strobes, and strobes (including weatherproof devices at exterior)	○ Yes ○ No
* (Fire Alarm) All smoke detectors	○ Yes ○ No
* (Fire Alarm) Tie in to carbon monoxide detectors at parking levels	○ Yes ○ No
* (Fire Alarm) Tie in to all fire smoke dampers (provided by mechanical design-builder)	○ Yes ○ No
* (Fire Alarm) All mini-horns in residential suites.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Fire Alarm) Connection and monitoring of all tamper and flow switches	○ Yes	○ No
* (Fire Alarm) All duct detectors	○ Yes	○ No
* (Fire Alarm) All monitoring related to the wet and dry sprinkler systems	○ Yes	○ No
* (Fire Alarm) All monitoring and interaction related to the generator system	○ Yes	○ No
* (Fire Alarm) Structured wiring to be open wired where allowed by code.	○ Yes	○ No
* (Fire Alarm) System is bidder designed deferred submittal for review and approval by County and AHJ, as well as PPS/Design team.	○ Yes	○ No
* (Fire Alarm) Includes all coordination with the fire protection design-builder.	○ Yes	○ No
* (Fire Alarm) Coordinate raceways for Fire Alarm systems provided in the Electrical Scope of work. Low Voltage coordination includes supplying drawing with locations off gridlines for sleeving, and other early rough in that is required for their scope of work to Electrical Subcontractor. Electrical Subcontractor will be required to communicate when information is required (well in advance of date needed on site), and coordinate sleeving with adjacent trades. Include raceway locations on Revit Model/BIM coordination. Note: Controls conduit can be excluded, provided by others (mechanical package)	○ Yes	○ No
* (Fire Alarm) BIM requirements for this scope of work are limited to providing information for the Div. 26 electrical contractor to represent in the model (supply CAD documents to Div. 26 contractor). Attend clash detection meetings to resolve issues with this scope of work (modify shop drawings as needed, and communicate with the Div. 26 subcontractor)	○ Yes	○ No
* (Fire Alarm) Include in design build scoping review, coordination, discussion and meetings regarding adjacent scope coordination, including, but not limited to: Door Hardware, Power Supplies, Mounting locations, Mounting Devices, etc.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Fire Alarm) It is assumed that sleeving that is installed by Electrical Subcontractor will be an empty raceway that will be require a rated fire penetration to be supplied by this subcontractor after cabling has been installed. Install all fire rating in a neat and workman like manner. Subcontractor trades will choose one manufacture for all fire rated penetrations to use on project (Hilti, 3M, etc.).	○ Yes ○ No

(FIRE ALARM) TEMPORARY SYSTEMS:

(FIRE ALARM) GENERAL:

* (Fire Alarm) Temporary Facilities are currently under development, a general list of requirements, based on a similar project is provided below to assist with budgeting process. MEP trades will assist in developing a final temp utility plan for the project. Each trade will be required to issue a narrative and drawing to demonstrate plan development and finalization. See attached Temporary Utility Service Assumptions Matrix and plan for general information/locations.	○ Yes ○ No
* (Fire Alarm) In preparation of Demolition work starting Summer 2021, all trades will be requested to provide a plan for PREP work to occur during summer of 2020 to reduce the amount of time after building is vacated in summer 2021 to "make safe for demolition" activities completion. This early work will be issued as an early work authorization prior to GMP.	○ Yes ○ No
* (Fire Alarm) All labor, supervision, materials, tools, equipment, fasteners, and adhesives as required to furnish install a complete system as outlined in the perspective bid package in accordance with all State Codes, Local Codes, NSC standards and jurisdictional codes & requirements, and in accordance with the contract documents.	○ Yes ○ No
* (Fire Alarm) Include all trade specific permits.	○ Yes ○ No
* (Fire Alarm) Inspect and test each service before placing temporary services in use. Arrange for required inspections and tests by governing authorities and obtain required certifications and permits for use. Inspect the power supply system from incoming gear to the spider boxes once a month. Report to Andersen and defects and results of monthly inspections.	○ Yes ○ No

* (Fire Alarm) Operate temporary services in a safe and efficient manner. Do not overload temporary services and facilities and do not let them interfere with the progress of work. ○ Yes ○ No

* (Fire Alarm) Should services of an independent engineer be required to survey existing and or temporary services, cost shall be included by contractor. Do not allow hazardous conditions to develop or persist at the site. ○ Yes ○ No

(FIRE ALARM) TEMPORARY UTILITIES:

* (Fire Alarm) Engage local utility companies to install temporary service to project or to make connections to existing service. ○ Yes ○ No

* (Fire Alarm) Arrange with companies, Owner, and Andersen for an acceptable time for service interruptions, where necessary, to make connections for temporary services. ○ Yes ○ No

* (Fire Alarm) Maintain service to Radio Station (Building I) to the greatest extent possible. Coordinate shutdowns as required. ○ Yes ○ No

* (Fire Alarm) Research and review the existing fire alarm system and security system. Contractor will have responsibility for hiring, providing engineering, and providing the needed equipment for temporary maintenance of these systems OR Replace with temporary system to provide Fire/Smoke detection during construction, including monitoring. Contract and coordinate with 2nd-tier contractors in order to reuse the existing systems for construction. Owner will allow Andersen to re-use the existing equipment, provided that they have the option to reclaim this equipment when the project is finished or it is no longer needed. Continued... ○ Yes ○ No

* (Fire Alarm) ... Provide temporary power as required for temporary fire alarm systems and temporary security systems. Coordinate installation and support with system installers. Provide training as required to Owner & Andersen in order to monitor and maintain a working temporary system during construction. Provide a written plan narrative and drawing to support temporary F/A system for approval by PPS/Insurance Company/Andersen Safety Dept. ○ Yes ○ No

26-00.3 SECURITY/ACCESS CONTROL-DESIGN ASSIST:

(SECURITY) GENERAL ITEMS:

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Security) The intent of this bid package is to contract with to assist with design and procurement of the scope of work described above. A limited notice to proceed for Preconstruction Services and/or design (as applies) will be issued, until the GMP contract is in place with the Owner- anticipated May/June 2021. Include breakdown on bid form for Preconstruction and/or Design (as applies) only, this amount will become both the initial contract value and the value that would be billed if project was canceled for any reason.	○ Yes ○ No
* (Security) This scope of work description is intended to be indicative of the work to be performed but is not intended to describe all work necessary for a complete job. It is intended that, except as specifically provided herein, there shall be no change orders for any work or features that could be reasonably inferred to be required from the Contract Documents. If any of the instructions in the Scope of Work is contradictory to the manufacturers' recommendations or violates any code, industry standard, or good practice, it is the responsibility of the Subcontractor to bring this to the attention of the Contractor prior to starting any part of that Scope of Work. Continued...	○ Yes ○ No
* (Security) ...Subcontractor is responsible to provide all design, materials, labor, supervision, tools, fasteners, adhesives, escalation and equipment necessary for a complete this scope of work in scope in strict accordance with Andersen Bid Documents, approved plans and specifications, and to bring to the Contractors attention any substantive work missing from this description including but not limited to the following	○ Yes ○ No
* (Security) Include Preconstruction Requirements as outlined on Preconstruction Service Requirements scoping, and project schedule for a general idea of project design & construction timing that is planned at this time.	○ Yes ○ No
* (Security) RFP Estimate should include all information shown on project documents and narratives issued by Bassetti & subconsultants. Additionally, include all requirements in PPS Design Standards, unless noted on Deviations from PPS Standards dated 8/19/19.	○ Yes ○ No
* (Security) Include BIM Requirements as outlined in Project Conditions, Attachment 5.6: BIM Execution Plan	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Security) Costs of all applicable trade permits, fees, and licenses (other than general building permit) are provided by this Subcontractor. Includes cost of plan check fees, if applicable.	○ Yes ○ No
* (Security) Provide all design-build/engineered framing, seismic bracing, anchoring design, engineering & materials required to support this system, including, but not limited to beams, posts, blocking, hangers, I-joists, plywood, etc. This includes adjustment of floor joist layout for plumbing, electrical, HVAC shafts, and fire sprinkler needs. For existing building assumptions, refer to drawings marked "Record Drawings, for reference Only." If information is not defined on this set of drawings, facility is available for bidder walk-thru for some as built confirmation. Additional information may be available via select demolition depending on school schedule while occupied until June 2021, or during demolition defined in the project schedule. Include coordination of locations and special inspection of anchors.	○ Yes ○ No
* (Security) Subcontractor shall provide anchors to secure equipment or piping. Cast in anchors will be utilized as needed for new work, and all anchors are to be submitted on and approved by the Structural Engineer. In slab coordination of embedded items will need to be coordinated with other MEP trades, Fireproofing Subcontractor, and Concrete Subcontractor. There will be multiple mobilizations required to install slab inserts at all new slabs being poured at the various buildings on the GHS campus.	○ Yes ○ No
* (Security) Note that depending on the final design of the construction documents, seismic / expansion joints may be required at the junction of some of the structures. Contractor shall provide the required expansion and contraction joints in the system as required by code or AHJ.	○ Yes ○ No
* (Security) Contractor is responsible to notify Andersen / Colas when Architectural review is required at various stages of construction as outlined in the spec.	○ Yes ○ No
* (Security) Any work in crawl space area will require special training. Refer to Project Conditions/Safety for additional information regarding confined space/potential hazardous materials (asbestos) in this area & training requirements. Include all costs for appropriate training and PPE in this scope of work.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Security) Includes all necessary coordination with other trades. Every effort will be made to conceal the piping, cabling, etc. within walls or soffits to limit the amount of visible MEP items.	○ Yes	○ No
* (Security) Subcontractor shall provide access panels as needed for access to this scope of work, to be installed by drywall contractor, this includes fire rated panels where required in rated assemblies.	○ Yes	○ No
* (Security) Subcontractor to furnish and install any required backing, miscellaneous embedments, hangers or supports necessary for support of Subcontractors materials or equipment.	○ Yes	○ No
* (Security) Includes all work required for mock-ups listed in the specifications/front end documents. Assume 1 Corridor Mock up and 1 Classroom mock up to be built in place for review/coordination (as early as feasible in the project).	○ Yes	○ No
* (Security) Provide all required videotaped training of the Owner's personnel in location, function, control and emergency procedures for all fire protection systems and the preventive and periodic maintenance, and emergency repair procedures. The time and location of this training shall be at the sole discretion of the Owner. In addition, provide an approximate thirty (30) minute video of all system, maintenance and operation. Provide a sign-up sheet to the Owner / Contractor of personnel that attended training.	○ Yes	○ No
* (Security) A standard warranty as provided with warranty procedures as described in the contract documents. It is specifically noted and agreed that any equipment running before the date of acceptance shall not start the warranty period. Only the receipt of the occupancy permit and substantial completion certificate(s) shall start the warranty period. Includes the Letter of Conformance when all work is complete. Certain specifications require more that 1 year warranty, provide warranties that meet or exceed requirements in specs.	○ Yes	○ No
* (Security) Furnish and install all sleeves required in CMU and/or concrete. If sleeves required in the basement walls, include in your pricing for core drilling and link seal of piping through walls. Note that all link seals are to be installed from the inside face of any exterior foundation walls, so that they can be tightened up over time.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Security) Provide all required fire caulking / safing necessary to achieve cover approval from the appropriate inspection agencies fire sprinkler work. Include submittals for fire caulking / safing indicating the methods to be used at various sections of the structure. Fire caulking and safing to be provided in Andersen in accordance with the plans and specifications and governing authorities. Fire caulking at exposed concrete or non painted CMU wall areas shall be gray in color. Subcontractors will agree on one manufacturer to be used for the entire project by each trade.	○ Yes ○ No
* (Security) The Subcontractor shall provide sealant around work which passes through cored holes, sleeves, framed, or blocked-out openings, drywall, floors, roofs, exterior walls, etc., in Andersen with local codes and specification requirements. Subcontractor shall provide all caulking, fire safing, flashings, counter flashings putty pads or other materials required for sealing their own penetrations. This work shall ensure prevention from the passage of smoke, gas, and flame between wall and floors and leaking water at waterproof membranes, flashing and roofing. Fire caulking work shall be included within the rough-in schedule for each floor.	○ Yes ○ No
* (Security) Penetrations in slab and shear walls are allowed only within the restrictions of the Structural Engineer's design and review / approval.	○ Yes ○ No
* (Security) All drilling, boxing, blocking etc. required for this work is to be completed by this Subcontractor. No cutting of structural members shall be allowed without written approval from the Superintendent. The repair cost for any damage caused by unapproved alterations to any part of the structure shall be deducted from contract amount.	○ Yes ○ No
* (Security) Coordinate the location of all items with architectural and structural features (including trim, columns, tile, appliances, cabinets, mirrors, etc.). Any items installed that will not allow the installation of designed features will be corrected at no additional cost.	○ Yes ○ No
* (Security) Provide all required hoisting for your scope of work. Andersen will not have a crane or forklift on site for subcontractor use. Provide unloading of own material. No long term stock piling of material on site due to limitation of space. Short term storage to be approved by Andersen supervision upon request.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Security) Provide all acoustic, seismic and vibrations control as indicated in the project documents, governing authorities or as normally required for a complete system.	○ Yes ○ No
* (Security) Address in your proposal the method for this scope of work/system to remain operational prior to demolition & after demolition is complete. Since demolition will be performed by multiple companies, and in a phased fashion, include costs to install temporary isolation valves if necessary so that buildings and individual "sectors" can be isolated for shut off independently. Coordinate work as necessary with Demolition/Abatement contractors and/or local utility companies. It is intended to have utilities operational during the entire project construction. Some buildings/areas may be completed in advance of other buildings/areas and may need temporary utility feeds. Include the following components in your proposal. Participate in conversations & coordinate with local Fire Dept., PPS, Demo & Abatement contractors to facilitate this goal. Include new system coverage as early as possible with respects to Fire/Life Safety systems. Continued...	○ Yes ○ No
* (Security) ...Include all costs to cut, cap, drain, etc. to prepare system for demolition by others. If your intent is to reuse any part of the existing system, please indicate on proposal form what components you intend to reuse. Include removal and salvage of items related to this system identified in demolition spec (If applies). a. Main Building (Sectors A, B, E, G1, G2, D, I) Isolated from Auditorium-Sector A for some of the work b. Demolition & Construction of New Sectors C, F, H c. Demolition of existing Auto shop d. Relocation of Fire Line (if required) by Civil Contractor e. Maintaining Service with Existing/New Hydrants as pertains to your scope of work. f. Maintaining Temp Power, Gas, Water, Waste as pertains to your scope of work	○ Yes ○ No
* (Security) Refer to Owner Salvage Listing for all items that are required to be salvaged on this project. Perform Salvage work for same items that are included in New work to be removed, packaged, and transferred to a storage location within 25 miles of jobsite.	○ Yes ○ No

powered by BUILDINGCONNECTED

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Security) It is assumed that the scope of work for demolition and new construction for the Utility Trench(es) will be scoped with typical 5' rule for utilities by Plumbing, Waste, Fire. Assume Civil Contractor will install new utility trench and/or extensions if required. Exception: Electrical is assumed to be located in a separate utility trench (if not already indicated as direct bury) and will be completely furnished & installed (trench, conduit, wiring, etc.) by the electrical contractor if required.	○ Yes ○ No
* (Security) Be responsible for the start-up and commissioning of the fire protection system. Attend weekly commissioning coordination meetings, and complete all required start-up and commissioning test forms as required by the Commissioning Agency. Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (Security) Include all slab on grade demolition/excavation, and existing wall penetrations as needed to facilitate work included in this subcontract.	○ Yes ○ No
* (Security) Escalation: refer to RFP Instructions/Budget Breakdown form for price escalation requirements.	○ Yes ○ No
* (Security) Include all requirements to safely handle lead/lead content shall be included in this scope of work, and performed by this contractor. Assume all existing surfaces include lead contaminates. A separate abatement contractor will not be hired to abate lead.	○ Yes ○ No
* (Security) Coordinate work, including layout for work to be performed by others regarding Asbestos abatement (must be performed by Abatement contractor).	○ Yes ○ No
* (Security) Incudes all required excavation and backfill for the plumbing underground scope of work for the remaining work on site drawings (within 5' of building) and for work under slab on grade. The slab on grade will be removed by others, trenching & piping placement is included in this scope of work, and includes layout of plumbing under slab utilities, including staking and pot-hole verifications.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Security) Provide line and grade for own work from grid lines and elevation bench marks provided by others.	○ Yes	○ No
* (Security) Include all requirements pertaining to this scope of work as indicated on LEED Score Card	○ Yes	○ No
* (Security) Price to include all welding required for your scope of work including protection of other trades work.	○ Yes	○ No
* (Security) Review scope of work below regarding temporary services to facilitate demolition and/or construction operations (trailer area and onsite requirements). Include all work, including planning, permitting, etc. for items that are temporary in nature to facilitate project. If design is required solely for temporary items, include in this scope of work.	○ Yes	○ No
* (Security) Portland Public School Standards have been provided for reference only. Include a scoping letter that states that your bid complies with every item in the PPS standards, and if not, provide a marked up version of the PPS standards explaining requested changes to match bid.	○ Yes	○ No
* (Security) It is understood that this project may exceed code minimum. If bidder would like to submit Value Engineering to provide code minimum, ONLY, specify item in spec/PPS standards and deviation that is proposed to reach code minimum ONLY.	○ Yes	○ No
* (Security) Provide all identification markers, labels, tags and related signage per the contract documents and local code/AHJ.	○ Yes	○ No
* (Security) Coordinate with electrical contractor/designers for all power requirements related to your scope of work. Any changes caused by this subcontractor which affects the scope of the electrical firm will be the responsibility of this subcontractor.	○ Yes	○ No
* (Security) Coordinate the location of all items included in your scope of work with architectural and structural features (including trim, white boards, misc. wall mounted items, etc.). Any items installed that will not allow the installation of designed features will be corrected at no extra cost, provided that these design features were apparent at the time of installation.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Security) Provide all testing, sterilization and certification of all systems as required by contract documents or as required by governing authorities.	○ Yes	○ No
* (Security) Andersen will provide egress lighting (via electrical subcontractor scope), each contractor is responsible for their own task lighting.	○ Yes	○ No
* (Security) Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes	○ No
* (Security) Subcontractor shall take field measurements of tight or congested areas prior to fabrication of materials. Modifications to the Subcontractor's work due to the Subcontractor's failure to field measure these key areas will be at the Subcontractor's expense. The use of the BIM coordination plan will be used to the greatest extent possible, however, due to timing of the Existing Conditions Building Scan, and incorporation into Revit, some items may require field verification to continue design/coordination without the scan fully available/incorporated.	○ Yes	○ No

(SECURITY) SPECIFIC ITEMS:

* (Security) Provide all required labor, material, equipment, wiring, and devices for the Security system as described in Security Bid Package 26-11 Specifications. Includes all design, drawings, and start-up for a complete, functioning system. Please note this scope of work is Design Assist.	○ Yes	○ No
* (Security) Coordinate raceways for Security systems provided in the Electrical Scope of work. Low Voltage coordination includes supplying drawing with locations off gridlines for sleeving, and other early rough in that is required for their scope of work to Electrical Subcontractor. Electrical Subcontractor will be required to communicate when information is required (well in advance of date needed on site), and coordinate sleeving with adjacent trades. Include raceway locations on Revit Model/BIM coordination. Note: Controls conduit can be excluded, provided by others (mechanical package)	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Security) BIM requirements for this scope of work are limited to providing information for the Div. 26 electrical contractor to represent in the model (supply CAD documents to Div. 26 contractor). Attend clash detection meetings to resolve issues with this scope of work (modify shop drawings as needed, and communicate with the Div. 26 subcontractor)	○ Yes ○ No
* (Security) Include in design assist scoping review, coordination, discussion and meetings regarding adjacent scope coordination, including, but not limited to: Door Hardware, Power Supplies, Mounting locations, Mounting Devices, etc.	○ Yes ○ No
* (Security) It is assumed that sleeving that is installed by Electrical Subcontractor will be an empty raceway that will be require a rated fire penetration to be supplied by this subcontractor after cabling has been installed. Install all fire rating in a neat and workman like manner. Subcontractor trades will choose one manufacture for all fire rated penetrations to use on project (Hilti, 3M, etc.).	○ Yes ○ No

(SECURITY) ACCESS CONTROL & INTRUSION DETECTION:

* (Security) Provide all required labor, material, equipment, wiring, and devices for the Security system. Includes all design, drawings, and start-up for a complete, functioning system.	○ Yes ○ No
* (Security) Provide all required labor, material, equipment, wiring, and devices for the Security system as described in Division 28: Electronic Safety & Security Basic Req, Access Control & Intrusion Detection, Video Surveillance. Includes all design, drawings, and start-up for a complete, functioning system	○ Yes ○ No
* (Security) Include all coordination as required between Owner preferred utility company (i.e. Comcast / Century Link) to fully activate system	○ Yes ○ No
* (Security) Provide security and monitoring for temporary construction offices (a.k.a. job trailers) for Andersen- Colas and PPS trailers for duration of the project.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Security) Scope includes all labor and materials to furnish and install a complete code compliant access control system, in compliance with local jurisdictions and the Project Documents. Access Control scope includes but is not strictly limited to: Security Management System (SMS), Access control system main control panel and door control panel, all card readers, access control cards, request to exit device (REX), power supplies, intrusion main control panel, motion detectors, cable and wiring, lockdown panic button, door entry video intercom system, etc.	○ Yes ○ No
* (Security) Scope includes installing, testing, trouble shooting, and verifying proper functionality of all access controlled doors.	○ Yes ○ No
* (Security) Scope includes labor for installing, wiring and powering up all electric strikes and latches provided by others.	○ Yes ○ No
* (Security) Scope includes furnishing and installing all low voltage power supplies needed/require for proper functionality of the access control system.	○ Yes ○ No
* (Security) All equipment to be bench tested prior to delivery to the jobsite.	○ Yes ○ No
* (Security) This subcontractor will in a timely manner review and verify all electrical requirements for the hardware and will coordinate with the plans and notify the general contractor if additional electrical needs will be required.	○ Yes ○ No
* (Security) This subcontractor is responsible to make sure the minimum requirements are met between the power and low voltage wiring is met and maintained.	○ Yes ○ No
* (Security) This subcontractor will provide eight (8) hours of training and two (2) hours of maintenance instruction, video recording of training, to the owner after the system is in place, for all access control and CCTV.	○ Yes ○ No
* (Security) This subcontractor shall coordinate with the door/door hardware subcontractor, to ensure each door will function properly with the equipment specified. If for some reason the access control equipment and door hardware are not compatible, it will be the responsibility of this subcontractor to notify Andersen-Colas in a timely manner and ahead of time so it does not delay the project schedule	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

(SECURITY) VIDEO SURVEILLANCE:

* (Security) 1. Scope includes all labor and materials to furnish and install a complete code compliant video surveillance system, in compliance with the plans and specifications. Scope includes but is not strictly limited to: Video management system (VMS), video recording system, cameras and lenses, camera enclosures and mounts, cable, wire, and all accessories.	○ Yes	○ No
* (Security) 2. Scope includes video management system capable of long-term storage as required per the Contract Documents.	○ Yes	○ No
* (Security) 3. Scope includes all cameras (interior & exterior) as required per the Contract Documents. Cameras shall have a date and time stamp for each camera.	○ Yes	○ No
* (Security) 4. Scope includes all interior cameras to be either dome style or installed in dome enclosures unless Project Documents specifically indicate otherwise. Coordinate specific requirements with Andersen-Colas, Designer and Owner prior to commencing work.	○ Yes	○ No
* (Security) 5. Scope includes cameras which have the proper lenses installed for the environment in which it is located and areas of monitoring to allow for optimal coverage. Coordinate specific requirements with Andersen-Colas, Designer and Owner prior to commencing work.	○ Yes	○ No
* (Security) 6. Scope includes cameras capable of operating in a 100 percent condensing humidity atmosphere and be dust and water tight.	○ Yes	○ No
* (Security) 7. Scope includes all cameras to be housed in tamper resistant enclosures	○ Yes	○ No

26-00.4 DISTRIBUTED ANTENNA SYSTEM-DESIGN ASSIST:

(DAS) GENERAL ITEMS:

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (DAS) The intent of this bid package is to contract with to assist with design and procurement of the scope of work described above. A limited notice to proceed for Preconstruction Services and/or design (as applies) will be issued, until the GMP contract is in place with the Owner- anticipated May/June 2021. Include breakdown on bid form for Preconstruction and/or Design (as applies) only, this amount will become both the initial contract value and the value that would be billed if project was canceled for any reason.	○ Yes ○ No
* (DAS) This scope of work description is intended to be indicative of the work to be performed but is not intended to describe all work necessary for a complete job. It is intended that, except as specifically provided herein, there shall be no change orders for any work or features that could be reasonably inferred to be required from the Contract Documents. If any of the instructions in the Scope of Work is contradictory to the manufacturers' recommendations or violates any code, industry standard, or good practice, it is the responsibility of the Subcontractor to bring this to the attention of the Contractor prior to starting any part of that Scope of Work. Continued...	○ Yes ○ No
* (DAS) ...Subcontractor is responsible to provide all design, materials, labor, supervision, tools, fasteners, adhesives, escalation and equipment necessary for a complete this scope of work in scope in strict accordance with Andersen Bid Documents, approved plans and specifications, and to bring to the Contractors attention any substantive work missing from this description including but not limited to the following	○ Yes ○ No
* (DAS) Include Preconstruction Requirements as outlined on Preconstruction Service Requirements scoping, and project schedule for a general idea of project design & construction timing that is planned at this time.	○ Yes ○ No
* (DAS) RFP Estimate should include all information shown on project documents and narratives issued by Bassetti & subconsultants. Additionally, include all requirements in PPS Design Standards, unless noted on Deviations from PPS Standards dated 8/19/19.	○ Yes ○ No
* (DAS) Include BIM Requirements as outlined in Project Conditions, Attachment 5.6: BIM Execution Plan	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (DAS) Costs of all applicable trade permits, fees, and licenses (other than general building permit) are provided by this Subcontractor. Includes cost of plan check fees, if applicable.	○ Yes ○ No
* (DAS) Provide all design-build/engineered framing, seismic bracing, anchoring design, engineering & materials required to support this system, including, but not limited to beams, posts, blocking, hangers, I-joists, plywood, etc. This includes adjustment of floor joist layout for plumbing, electrical, HVAC shafts, and fire sprinkler needs. For existing building assumptions, refer to drawings marked "Record Drawings, for reference Only." If information is not defined on this set of drawings, facility is available for bidder walk-thru for some as built confirmation. Additional information may be available via select demolition depending on school schedule while occupied until June 2021, or during demolition defined in the project schedule. Include coordination of locations and special inspection of anchors.	○ Yes ○ No
* (DAS) Subcontractor shall provide anchors to secure equipment or piping. Cast in anchors will be utilized as needed for new work, and all anchors are to be submitted on and approved by the Structural Engineer. In slab coordination of embedded items will need to be coordinated with other MEP trades, Fireproofing Subcontractor, and Concrete Subcontractor. There will be multiple mobilizations required to install slab inserts at all new slabs being poured at the various buildings on the GHS campus.	○ Yes ○ No
* (DAS) Note that depending on the final design of the construction documents, seismic / expansion joints may be required at the junction of some of the structures. Contractor shall provide the required expansion and contraction joints in the system as required by code or AHJ.	○ Yes ○ No
* (DAS) Contractor is responsible to notify Andersen / Colas when Architectural review is required at various stages of construction as outlined in the spec.	○ Yes ○ No
* (DAS) Any work in crawl space area will require special training. Refer to Project Conditions/Safety for additional information regarding confined space/potential hazardous materials (asbestos) in this area & training requirements. Include all costs for appropriate training and PPE in this scope of work.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (DAS) Includes all necessary coordination with other trades. Every effort will be made to conceal the piping, cabling, etc. within walls or soffits to limit the amount of visible MEP items.	○ Yes	○ No
* (DAS) Subcontractor shall provide access panels as needed for access to this scope of work, to be installed by drywall contractor, this includes fire rated panels where required in rated assemblies.	○ Yes	○ No
* (DAS) Subcontractor to furnish and install any required backing, miscellaneous embedments, hangers or supports necessary for support of Subcontractors materials or equipment.	○ Yes	○ No
* (DAS) Includes all work required for mock-ups listed in the specifications/front end documents. Assume 1 Corridor Mock up and 1 Classroom mock up to be built in place for review/coordination (as early as feasible in the project).	○ Yes	○ No
* (DAS) Provide all required videotaped training of the Owner's personnel in location, function, control and emergency procedures for all fire protection systems and the preventive and periodic maintenance, and emergency repair procedures. The time and location of this training shall be at the sole discretion of the Owner. In addition, provide an approximate thirty (30) minute video of all system, maintenance and operation. Provide a sign-up sheet to the Owner / Contractor of personnel that attended training.	○ Yes	○ No
* (DAS) A standard warranty as provided with warranty procedures as described in the contract documents. It is specifically noted and agreed that any equipment running before the date of acceptance shall not start the warranty period. Only the receipt of the occupancy permit and substantial completion certificate(s) shall start the warranty period. Includes the Letter of Conformance when all work is complete. Certain specifications require more that 1 year warranty, provide warranties that meet or exceed requirements in specs.	○ Yes	○ No
* (DAS) Furnish and install all sleeves required in CMU and/or concrete. If sleeves required in the basement walls, include in your pricing for core drilling and link seal of piping through walls. Note that all link seals are to be installed from the inside face of any exterior foundation walls, so that they can be tightened up over time.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (DAS) Provide all required fire caulking / safing necessary to achieve cover approval from the appropriate inspection agencies fire sprinkler work. Include submittals for fire caulking / safing indicating the methods to be used at various sections of the structure. Fire caulking and safing to be provided in Andersen in accordance with the plans and specifications and governing authorities. Fire caulking at exposed concrete or non painted CMU wall areas shall be gray in color. Subcontractors will agree on one manufacturer to be used for the entire project by each trade.	○ Yes ○ No
* (DAS) The Subcontractor shall provide sealant around work which passes through cored holes, sleeves, framed, or blocked-out openings, drywall, floors, roofs, exterior walls, etc., in Andersen with local codes and specification requirements. Subcontractor shall provide all caulking, fire safing, flashings, counter flashings putty pads or other materials required for sealing their own penetrations. This work shall ensure prevention from the passage of smoke, gas, and flame between wall and floors and leaking water at waterproof membranes, flashing and roofing. Fire caulking work shall be included within the rough-in schedule for each floor.	○ Yes ○ No
* (DAS) Penetrations in slab and shear walls are allowed only within the restrictions of the Structural Engineer's design and review / approval.	○ Yes ○ No
* (DAS) All drilling, boxing, blocking etc. required for this work is to be completed by this Subcontractor. No cutting of structural members shall be allowed without written approval from the Superintendent. The repair cost for any damage caused by unapproved alterations to any part of the structure shall be deducted from contract amount.	○ Yes ○ No
* (DAS) Coordinate the location of all items with architectural and structural features (including trim, columns, tile, appliances, cabinets, mirrors, etc.). Any items installed that will not allow the installation of designed features will be corrected at no additional cost.	○ Yes ○ No
* (DAS) Provide all required hoisting for your scope of work. Andersen will not have a crane or forklift on site for subcontractor use. Provide unloading of own material. No long term stock piling of material on site due to limitation of space. Short term storage to be approved by Andersen supervision upon request.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (DAS) Provide all acoustic, seismic and vibrations control as indicated in the project documents, governing authorities or as normally required for a complete system.	○ Yes ○ No
* (DAS) Address in your proposal the method for this scope of work/system to remain operational prior to demolition & after demolition is complete. Since demolition will be performed by multiple companies, and in a phased fashion, include costs to install temporary isolation valves if necessary so that buildings and individual "sectors" can be isolated for shut off independently. Coordinate work as necessary with Demolition/Abatement contractors and/or local utility companies. It is intended to have utilities operational during the entire project construction. Some buildings/areas may be completed in advance of other buildings/areas and may need temporary utility feeds. Include the following components in your proposal. Participate in conversations & coordinate with local Fire Dept., PPS, Demo & Abatement contractors to facilitate this goal. Continued...	○ Yes ○ No
* (DAS) ... Include new system coverage as early as possible with respects to Fire/Life Safety systems. Include all costs to cut, cap, drain, etc. to prepare system for demolition by others. If your intent is to reuse any part of the existing system, please indicate on proposal form what components you intend to reuse. Include removal and salvage of items related to this system identified in demolition spec (If applies). a. Main Building (Sectors A, B, E, G1, G2, D, I) Isolated from Auditorium-Sector A for some of the work b. Demolition & Construction of New Sectors C, F, H c. Demolition of existing Auto shop d. Relocation of Fire Line (if required) by Civil Contractor e. Maintaining Service with Existing/New Hydrants as pertains to your scope of work. f. Maintaining Temp Power, Gas, Water, Waste as pertains to your scope of work	○ Yes ○ No
* (DAS) Refer to Owner Salvage Listing for all items that are required to be salvaged on this project. Perform Salvage work for same items that are included in New work to be removed, packaged, and transferred to a storage location within 25 miles of jobsite.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (DAS) It is assumed that the scope of work for demolition and new construction for the Utility Trench(es) will be scoped with typical 5' rule for utilities by Plumbing, Waste, Fire. Assume Civil Contractor will install new utility trench and/or extensions if required. Exception: Electrical is assumed to be located in a separate utility trench (if not already indicated as direct bury) and will be completely furnished & installed (trench, conduit, wiring, etc.) by the electrical contractor if required.	○ Yes ○ No
* (DAS) Be responsible for the start-up and commissioning of the fire protection system. Attend weekly commissioning coordination meetings, and complete all required start-up and commissioning test forms as required by the Commissioning Agency. Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (DAS) Include all slab on grade demolition/excavation, and existing wall penetrations as needed to facilitate work included in this subcontract.	○ Yes ○ No
* (DAS) Escalation: refer to RFP Instructions/Budget Breakdown form for price escalation requirements.	○ Yes ○ No
* (DAS) Include all requirements to safely handle lead/lead content shall be included in this scope of work, and performed by this contractor. Assume all existing surfaces include lead contaminates. A separate abatement contractor will not be hired to abate lead.	○ Yes ○ No
* (DAS) Coordinate work, including layout for work to be performed by others regarding Asbestos abatement (must be performed by Abatement contractor).	○ Yes ○ No
* (DAS) Incudes all required excavation and backfill for the plumbing underground scope of work for the remaining work on site drawings (within 5' of building) and for work under slab on grade. The slab on grade will be removed by others, trenching & piping placement is included in this scope of work, and includes layout of plumbing under slab utilities, including staking and pot-hole verifications.	○ Yes ○ No
* (DAS) Provide line and grade for own work from grid lines and elevation bench marks provided by others.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (DAS) Include all requirements pertaining to this scope of work as indicated on LEED Score Card	○ Yes	○ No
* (DAS) Price to include all welding required for your scope of work including protection of other trades work.	○ Yes	○ No
* (DAS) Review scope of work below regarding temporary services to facilitate demolition and/or construction operations (trailer area and onsite requirements). Include all work, including planning, permitting, etc. for items that are temporary in nature to facilitate project. If design is required solely for temporary items, include in this scope of work.	○ Yes	○ No
* (DAS) Portland Public School Standards have been provided for reference only. Include a scoping letter that states that your bid complies with every item in the PPS standards, and if not, provide a marked up version of the PPS standards explaining requested changes to match bid.	○ Yes	○ No
* (DAS) It is understood that this project may exceed code minimum. If bidder would like to submit Value Engineering to provide code minimum, ONLY, specify item in spec/PPS standards and deviation that is proposed to reach code minimum ONLY.	○ Yes	○ No
* (DAS) Provide all identification markers, labels, tags and related signage per the contract documents and local code/AHJ.	○ Yes	○ No
* (DAS) Coordinate with electrical contractor/designers for all power requirements related to your scope of work. Any changes caused by this subcontractor which affects the scope of the electrical firm will be the responsibility of this subcontractor.	○ Yes	○ No
* (DAS) Coordinate the location of all items included in your scope of work with architectural and structural features (including trim, white boards, misc. wall mounted items, etc.). Any items installed that will not allow the installation of designed features will be corrected at no extra cost, provided that these design features were apparent at the time of installation.	○ Yes	○ No
* (DAS) Provide all testing, sterilization and certification of all systems as required by contract documents or as required by governing authorities.	○ Yes	○ No

* (DAS) Andersen will provide egress lighting (via electrical subcontractor scope), each contractor is responsible for their own task lighting.	○ Yes	○ No
* (DAS) Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes	○ No
* (DAS) Subcontractor shall take field measurements of tight or congested areas prior to fabrication of materials. Modifications to the Subcontractor's work due to the Subcontractor's failure to field measure these key areas will be at the Subcontractor's expense. The use of the BIM coordination plan will be used to the greatest extent possible, however, due to timing of the Existing Conditions Building Scan, and incorporation into Revit, some items may require field verification to continue design/coordination without the scan fully available/incorporated.	○ Yes	○ No

(DAS) SPECIFIC ITEMS:

* (DAS) Provide all required labor, material, equipment, wiring, and devices for the DAS system as described in Bid Package 26-18 Specifications. Includes all design, drawings, and start-up for a complete, functioning system. Please note this scope is Design Assist.	○ Yes	○ No
* (DAS) System shall meet Portland Fire & Rescue requirements.	○ Yes	○ No
* (DAS) Subcontractor is responsible for testing the system's performance and balancing the system's signal strength according and subject to the Wireless Operators criteria and approval.	○ Yes	○ No
* (DAS) BIM requirements for this scope of work are limited to providing information for the Div. 26 electrical contractor to represent in the model (supply CAD documents to Div. 26 contractor). Attend clash detection meetings to resolve issues with this scope of work (modify shop drawings as needed, and communicate with the Div. 26 subcontractor)	○ Yes	○ No

26-00.5 PV ARRAYS-DESIGN ASSIST:

(PV) GENERAL ITEMS:

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (PV) The intent of this bid package is to contract with to assist with design and procurement of the scope of work described above. A limited notice to proceed for Preconstruction Services and/or design (as applies) will be issued, until the GMP contract is in place with the Owner-anticipated May/June 2021. Include breakdown on bid form for Preconstruction and/or Design (as applies) only, this amount will become both the initial contract value and the value that would be billed if project was canceled for any reason.	○ Yes ○ No
* (PV) This scope of work description is intended to be indicative of the work to be performed but is not intended to describe all work necessary for a complete job. It is intended that, except as specifically provided herein, there shall be no change orders for any work or features that could be reasonably inferred to be required from the Contract Documents. If any of the instructions in the Scope of Work is contradictory to the manufacturers' recommendations or violates any code, industry standard, or good practice, it is the responsibility of the Subcontractor to bring this to the attention of the Contractor prior to starting any part of that Scope of Work. Continued...	○ Yes ○ No
* (PV) ...Subcontractor is responsible to provide all design, materials, labor, supervision, tools, fasteners, adhesives, escalation and equipment necessary for a complete this scope of work in scope in strict accordance with Andersen Bid Documents, approved plans and specifications, and to bring to the Contractors attention any substantive work missing from this description including but not limited to the following	○ Yes ○ No
* (PV) Include Preconstruction Requirements as outlined on Preconstruction Service Requirements scoping, and project schedule for a general idea of project design & construction timing that is planned at this time.	○ Yes ○ No
* (PV) RFP Estimate should include all information shown on project documents and narratives issued by Bassetti & subconsultants. Additionally, include all requirements in PPS Design Standards, unless noted on Deviations from PPS Standards dated 8/19/19.	○ Yes ○ No
* (PV) Include BIM Requirements as outlined in Project Conditions, Attachment 5.6: BIM Execution Plan	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (PV) Costs of all applicable trade permits, fees, and licenses (other than general building permit) are provided by this Subcontractor. Includes cost of plan check fees, if applicable.	○ Yes ○ No
* (PV) Provide all design-build/engineered framing, seismic bracing, anchoring design, engineering & materials required to support this system, including, but not limited to beams, posts, blocking, hangers, I-joists, plywood, etc. This includes adjustment of floor joist layout for plumbing, electrical, HVAC shafts, and fire sprinkler needs. For existing building assumptions, refer to drawings marked "Record Drawings, for reference Only." If information is not defined on this set of drawings, facility is available for bidder walk-thru for some as built confirmation. Additional information may be available via select demolition depending on school schedule while occupied until June 2021, or during demolition defined in the project schedule. Include coordination of locations and special inspection of anchors.	○ Yes ○ No
* (PV) Subcontractor shall provide anchors to secure equipment or piping. Cast in anchors will be utilized as needed for new work, and all anchors are to be submitted on and approved by the Structural Engineer. In slab coordination of embedded items will need to be coordinated with other MEP trades, Fireproofing Subcontractor, and Concrete Subcontractor. There will be multiple mobilizations required to install slab inserts at all new slabs being poured at the various buildings on the GHS campus.	○ Yes ○ No
* (PV) Note that depending on the final design of the construction documents, seismic / expansion joints may be required at the junction of some of the structures. Contractor shall provide the required expansion and contraction joints in the system as required by code or AHJ.	○ Yes ○ No
* (PV) Contractor is responsible to notify Andersen / Colas when Architectural review is required at various stages of construction as outlined in the spec.	○ Yes ○ No
* (PV) Any work in crawl space area will require special training. Refer to Project Conditions/Safety for additional information regarding confined space/potential hazardous materials (asbestos) in this area & training requirements. Include all costs for appropriate training and PPE in this scope of work.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (PV) Includes all necessary coordination with other trades. Every effort will be made to conceal the piping, cabling, etc. within walls or soffits to limit the amount of visible MEP items.	○ Yes	○ No
* (PV) Subcontractor shall provide access panels as needed for access to this scope of work, to be installed by drywall contractor, this includes fire rated panels where required in rated assemblies.	○ Yes	○ No
* (PV) Subcontractor to furnish and install any required backing, miscellaneous embedments, hangers or supports necessary for support of Subcontractors materials or equipment.	○ Yes	○ No
* (PV) Includes all work required for mock-ups listed in the specifications/front end documents. Assume 1 Corridor Mock up and 1 Classroom mock up to be built in place for review/coordination (as early as feasible in the project).	○ Yes	○ No
* (PV) Provide all required videotaped training of the Owner's personnel in location, function, control and emergency procedures for all fire protection systems and the preventive and periodic maintenance, and emergency repair procedures. The time and location of this training shall be at the sole discretion of the Owner. In addition, provide an approximate thirty (30) minute video of all system, maintenance and operation. Provide a sign-up sheet to the Owner / Contractor of personnel that attended training.	○ Yes	○ No
* (PV) A standard warranty as provided with warranty procedures as described in the contract documents. It is specifically noted and agreed that any equipment running before the date of acceptance shall not start the warranty period. Only the receipt of the occupancy permit and substantial completion certificate(s) shall start the warranty period. Includes the Letter of Conformance when all work is complete. Certain specifications require more that 1 year warranty, provide warranties that meet or exceed requirements in specs.	○ Yes	○ No
* (PV) Furnish and install all sleeves required in CMU and/or concrete. If sleeves required in the basement walls, include in your pricing for core drilling and link seal of piping through walls. Note that all link seals are to be installed from the inside face of any exterior foundation walls, so that they can be tightened up over time.	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (PV) Provide all required fire caulking / safing necessary to achieve cover approval from the appropriate inspection agencies fire sprinkler work. Include submittals for fire caulking / safing indicating the methods to be used at various sections of the structure. Fire caulking and safing to be provided in Andersen in accordance with the plans and specifications and governing authorities. Fire caulking at exposed concrete or non painted CMU wall areas shall be gray in color. Subcontractors will agree on one manufacturer to be used for the entire project by each trade.	○ Yes ○ No
* (PV) The Subcontractor shall provide sealant around work which passes through cored holes, sleeves, framed, or blocked-out openings, drywall, floors, roofs, exterior walls, etc., in Andersen with local codes and specification requirements. Subcontractor shall provide all caulking, fire safing, flashings, counter flashings putty pads or other materials required for sealing their own penetrations. This work shall ensure prevention from the passage of smoke, gas, and flame between wall and floors and leaking water at waterproof membranes, flashing and roofing. Fire caulking work shall be included within the rough-in schedule for each floor.	○ Yes ○ No
* (PV) Penetrations in slab and shear walls are allowed only within the restrictions of the Structural Engineer's design and review / approval.	○ Yes ○ No
* (PV) All drilling, boxing, blocking etc. required for this work is to be completed by this Subcontractor. No cutting of structural members shall be allowed without written approval from the Superintendent. The repair cost for any damage caused by unapproved alterations to any part of the structure shall be deducted from contract amount.	○ Yes ○ No
* (PV) Coordinate the location of all items with architectural and structural features (including trim, columns, tile, appliances, cabinets, mirrors, etc.). Any items installed that will not allow the installation of designed features will be corrected at no additional cost.	○ Yes ○ No
* (PV) Provide all required hoisting for your scope of work. Andersen will not have a crane or forklift on site for subcontractor use. Provide unloading of own material. No long term stock piling of material on site due to limitation of space. Short term storage to be approved by Andersen supervision upon request.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (PV) Provide all acoustic, seismic and vibrations control as indicated in the project documents, governing authorities or as normally required for a complete system.	○ Yes ○ No
* (PV) Address in your proposal the method for this scope of work/system to remain operational prior to demolition & after demolition is complete. Since demolition will be performed by multiple companies, and in a phased fashion, include costs to install temporary isolation valves if necessary so that buildings and individual "sectors" can be isolated for shut off independently. Coordinate work as necessary with Demolition/Abatement contractors and/or local utility companies. It is intended to have utilities operational during the entire project construction. Some buildings/areas may be completed in advance of other buildings/areas and may need temporary utility feeds. Include the following components in your proposal. Participate in conversations & coordinate with local Fire Dept., PPS, Demo & Abatement contractors to facilitate this goal. Include new system coverage as early as possible with respects to Fire/Life Safety systems. Continued...	○ Yes ○ No
* (PV) ...Include all costs to cut, cap, drain, etc. to prepare system for demolition by others. If your intent is to reuse any part of the existing system, please indicate on proposal form what components you intend to reuse. Include removal and salvage of items related to this system identified in demolition spec (If applies). a. Main Building (Sectors A, B, E, G1, G2, D, I) Isolated from Auditorium-Sector A for some of the work b. Demolition & Construction of New Sectors C, F, H c. Demolition of existing Auto shop d. Relocation of Fire Line (if required) by Civil Contractor e. Maintaining Service with Existing/New Hydrants as pertains to your scope of work. f. Maintaining Temp Power, Gas, Water, Waste as pertains to your scope of work	○ Yes ○ No
* (PV) Refer to Owner Salvage Listing for all items that are required to be salvaged on this project. Perform Salvage work for same items that are included in New work to be removed, packaged, and transferred to a storage location within 25 miles of jobsite.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (PV) It is assumed that the scope of work for demolition and new construction for the Utility Trench(es) will be scoped with typical 5' rule for utilities by Plumbing, Waste, Fire. Assume Civil Contractor will install new utility trench and/or extensions if required. Exception: Electrical is assumed to be located in a separate utility trench (if not already indicated as direct bury) and will be completely furnished & installed (trench, conduit, wiring, etc.) by the electrical contractor if required.	○ Yes ○ No
* (PV) Be responsible for the start-up and commissioning of the fire protection system. Attend weekly commissioning coordination meetings, and complete all required start-up and commissioning test forms as required by the Commissioning Agency. Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (PV) Include all slab on grade demolition/excavation, and existing wall penetrations as needed to facilitate work included in this subcontract.	○ Yes ○ No
* (PV) Escalation: refer to RFP Instructions/Budget Breakdown form for price escalation requirements.	○ Yes ○ No
* (PV) Include all requirements to safely handle lead/lead content shall be included in this scope of work, and performed by this contractor. Assume all existing surfaces include lead contaminates. A separate abatement contractor will not be hired to abate lead.	○ Yes ○ No
* (PV) Coordinate work, including layout for work to be performed by others regarding Asbestos abatement (must be performed by Abatement contractor).	○ Yes ○ No
* (PV) Incudes all required excavation and backfill for the plumbing underground scope of work for the remaining work on site drawings (within 5' of building) and for work under slab on grade. The slab on grade will be removed by others, trenching & piping placement is included in this scope of work, and includes layout of plumbing under slab utilities, including staking and pot-hole verifications.	○ Yes ○ No
* (PV) Provide line and grade for own work from grid lines and elevation bench marks provided by others.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

*	(PV) Include all requirements pertaining to this scope of work as indicated on LEED Score Card	○ Yes ○ No
*	(PV) Price to include all welding required for your scope of work including protection of other trades work.	○ Yes ○ No
*	(PV) Review scope of work below regarding temporary services to facilitate demolition and/or construction operations (trailer area and onsite requirements). Include all work, including planning, permitting, etc. for items that are temporary in nature to facilitate project. If design is required solely for temporary items, include in this scope of work.	○ Yes ○ No
*	(PV) Portland Public School Standards have been provided for reference only. Include a scoping letter that states that your bid complies with every item in the PPS standards, and if not, provide a marked up version of the PPS standards explaining requested changes to match bid.	○ Yes ○ No
*	(PV) It is understood that this project may exceed code minimum. If bidder would like to submit Value Engineering to provide code minimum, ONLY, specify item in spec/PPS standards and deviation that is proposed to reach code minimum ONLY.	○ Yes ○ No
*	(PV) Provide all identification markers, labels, tags and related signage per the contract documents and local code/AHJ.	○ Yes ○ No
*	(PV) Coordinate with electrical contractor/designers for all power requirements related to your scope of work. Any changes caused by this subcontractor which affects the scope of the electrical firm will be the responsibility of this subcontractor.	○ Yes ○ No
*	(PV) Coordinate the location of all items included in your scope of work with architectural and structural features (including trim, white boards, misc. wall mounted items, etc.). Any items installed that will not allow the installation of designed features will be corrected at no extra cost, provided that these design features were apparent at the time of installation.	○ Yes ○ No
*	(PV) Provide all testing, sterilization and certification of all systems as required by contract documents or as required by governing authorities.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (PV) Andersen will provide egress lighting (via electrical subcontractor scope), each contractor is responsible for their own task lighting.	○ Yes ○ No
* (PV) Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (PV) Subcontractor shall take field measurements of tight or congested areas prior to fabrication of materials. Modifications to the Subcontractor's work due to the Subcontractor's failure to field measure these key areas will be at the Subcontractor's expense. The use of the BIM coordination plan will be used to the greatest extent possible, however, due to timing of the Existing Conditions Building Scan, and incorporation into Revit, some items may require field verification to continue design/coordination without the scan fully available/incorporated.	○ Yes ○ No

(PV) SPECIFIC ITEMS:

* (PV) Provide all required labor, material, equipment, wiring, and devices for the PV system as described in Photo Voltaic Bid Package 26-20 Specifications. Includes all design, drawings, and start-up for a complete, functioning system. Please note this scope is Design Assist.	○ Yes ○ No
* (PV) Provide design, fabrication, furnish and installation for the PV arrays per bid package 26-20 specification sections and all division 00 and 01 requirements.	○ Yes ○ No
* (PV) Since the State of Oregon has a mandate regarding Solar Energy of 1.5% of the project budget, it is understood that this scope of work will be developed in a way to implement the State Mandate. The cost of this bid package, and other associated items (such as structural supports) are utilized to establish cost and compared to a project budget of approximately $87.6 Million. Subcontractor is required to assist, and scale project scope accordingly. It is expected that the cost estimate provided by the subcontractor will be the basis for future additions/deletions of PV Arrays. Unit pricing should be representative of future cost estimates as design progresses.	○ Yes ○ No

* (PV) Supports for PV Arrays must be design prior to 50% CD issuance. Subcontractor will assist with structural layout and connections for PV supports.	○ Yes ○ No
* (PV) Photo Voltaic shall include all own conduit and wire up to the recombiner panel.	○ Yes ○ No
* (PV) BIM requirements for this scope of work are limited to providing information for the Div. 26 electrical contractor to represent in the model (supply CAD documents to Div. 26 contractor). Attend clash detection meetings to resolve issues with this scope of work (modify shop drawings as needed, and communicate with the Div. 26 subcontractor)	○ Yes ○ No

26-00.6 BELLS & CLOCKS-DESIGN ASSIST:

(BELLS AND CLOCKS) GENERAL ITEMS:

* (Bells and Clocks) The intent of this bid package is to contract with to assist with design and procurement of the scope of work described above. A limited notice to proceed for Preconstruction Services and/or design (as applies) will be issued, until the GMP contract is in place with the Owner-anticipated May/June 2021. Include breakdown on bid form for Preconstruction and/or Design (as applies) only, this amount will become both the initial contract value and the value that would be billed if project was canceled for any reason.	○ Yes ○ No
* (Bells and Clocks) This scope of work description is intended to be indicative of the work to be performed but is not intended to describe all work necessary for a complete job. It is intended that, except as specifically provided herein, there shall be no change orders for any work or features that could be reasonably inferred to be required from the Contract Documents. If any of the instructions in the Scope of Work is contradictory to the manufacturers' recommendations or violates any code, industry standard, or good practice, it is the responsibility of the Subcontractor to bring this to the attention of the Contractor prior to starting any part of that Scope of Work.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Bells and Clocks) Subcontractor is responsible to provide all design, materials, labor, supervision, tools, fasteners, adhesives, escalation and equipment necessary for a complete this scope of work in scope in strict accordance with Andersen Bid Documents, approved plans and specifications, and to bring to the Contractors attention any substantive work missing from this description including but not limited to the following	○ Yes ○ No
* (Bells and Clocks) Include Preconstruction Requirements as outlined on Preconstruction Service Requirements scoping, and project schedule for a general idea of project design & construction timing that is planned at this time.	○ Yes ○ No
* (Bells and Clocks) RFP Estimate should include all information shown on project documents and narratives issued by Bassetti & subconsultants. Additionally, include all requirements in PPS Design Standards, unless noted on Deviations from PPS Standards dated 8/19/19.	○ Yes ○ No
* (Bells and Clocks) Include BIM Requirements as outlined in Project Conditions, Attachment 5.6: BIM Execution Plan	○ Yes ○ No
* (Bells and Clocks) Costs of all applicable trade permits, fees, and licenses (other than general building permit) are provided by this Subcontractor. Includes cost of plan check fees, if applicable.	○ Yes ○ No
* (Bells and Clocks) Provide all design-build/engineered framing, seismic bracing, anchoring design, engineering & materials required to support this system, including, but not limited to beams, posts, blocking, hangers, I-joists, plywood, etc. This includes adjustment of floor joist layout for plumbing, electrical, HVAC shafts, and fire sprinkler needs. For existing building assumptions, refer to drawings marked "Record Drawings, for reference Only." If information is not defined on this set of drawings, facility is available for bidder walk-thru for some as built confirmation. Additional information may be available via select demolition depending on school schedule while occupied until June 2021, or during demolition defined in the project schedule. Include coordination of locations and special inspection of anchors.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Bells and Clocks) Subcontractor shall provide anchors to secure equipment or piping. Cast in anchors will be utilized as needed for new work, and all anchors are to be submitted on and approved by the Structural Engineer. In slab coordination of embedded items will need to be coordinated with other MEP trades, Fireproofing Subcontractor, and Concrete Subcontractor. There will be multiple mobilizations required to install slab inserts at all new slabs being poured at the various buildings on the GHS campus.	○ Yes	○ No
* (Bells and Clocks) Note that depending on the final design of the construction documents, seismic / expansion joints may be required at the junction of some of the structures. Contractor shall provide the required expansion and contraction joints in the system as required by code or AHJ.	○ Yes	○ No
* (Bells and Clocks) Contractor is responsible to notify Andersen / Colas when Architectural review is required at various stages of construction as outlined in the spec.	○ Yes	○ No
* (Bells and Clocks) Any work in crawl space area will require special training. Refer to Project Conditions/Safety for additional information regarding confined space/potential hazardous materials (asbestos) in this area & training requirements. Include all costs for appropriate training and PPE in this scope of work.	○ Yes	○ No
* (Bells and Clocks) Includes all necessary coordination with other trades. Every effort will be made to conceal the piping, cabling, etc. within walls or soffits to limit the amount of visible MEP items.	○ Yes	○ No
* (Bells and Clocks) Subcontractor shall provide access panels as needed for access to this scope of work, to be installed by drywall contractor, this includes fire rated panels where required in rated assemblies.	○ Yes	○ No
* (Bells and Clocks) Subcontractor to furnish and install any required backing, miscellaneous embedments, hangers or supports necessary for support of Subcontractors materials or equipment.	○ Yes	○ No
* (Bells and Clocks) Includes all work required for mock-ups listed in the specifications/front end documents. Assume 1 Corridor Mock up and 1 Classroom mock up to be built in place for review/coordination (as early as feasible in the project).	○ Yes	○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Bells and Clocks) Provide all required videotaped training of the Owner's personnel in location, function, control and emergency procedures for all fire protection systems and the preventive and periodic maintenance, and emergency repair procedures. The time and location of this training shall be at the sole discretion of the Owner. In addition, provide an approximate thirty (30) minute video of all system, maintenance and operation. Provide a sign-up sheet to the Owner / Contractor of personnel that attended training.	○ Yes ○ No
* (Bells and Clocks) A standard warranty as provided with warranty procedures as described in the contract documents. It is specifically noted and agreed that any equipment running before the date of acceptance shall not start the warranty period. Only the receipt of the occupancy permit and substantial completion certificate(s) shall start the warranty period. Includes the Letter of Conformance when all work is complete. Certain specifications require more that 1 year warranty, provide warranties that meet or exceed requirements in specs.	○ Yes ○ No
* (Bells and Clocks) Furnish and install all sleeves required in CMU and/or concrete. If sleeves required in the basement walls, include in your pricing for core drilling and link seal of piping through walls. Note that all link seals are to be installed from the inside face of any exterior foundation walls, so that they can be tightened up over time.	○ Yes ○ No
* (Bells and Clocks) Provide all required fire caulking / safing necessary to achieve cover approval from the appropriate inspection agencies fire sprinkler work. Include submittals for fire caulking / safing indicating the methods to be used at various sections of the structure. Fire caulking and safing to be provided in Andersen in accordance with the plans and specifications and governing authorities. Fire caulking at exposed concrete or non painted CMU wall areas shall be gray in color. Subcontractors will agree on one manufacturer to be used for the entire project by each trade.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Bells and Clocks) The Subcontractor shall provide sealant around work which passes through cored holes, sleeves, framed, or blocked-out openings, drywall, floors, roofs, exterior walls, etc., in Andersen with local codes and specification requirements. Subcontractor shall provide all caulking, fire safing, flashings, counter flashings putty pads or other materials required for sealing their own penetrations. This work shall ensure prevention from the passage of smoke, gas, and flame between wall and floors and leaking water at waterproof membranes, flashing and roofing. Fire caulking work shall be included within the rough-in schedule for each floor.	○ Yes ○ No
* (Bells and Clocks) Penetrations in slab and shear walls are allowed only within the restrictions of the Structural Engineer's design and review / approval.	○ Yes ○ No
* (Bells and Clocks) All drilling, boxing, blocking etc. required for this work is to be completed by this Subcontractor. No cutting of structural members shall be allowed without written approval from the Superintendent. The repair cost for any damage caused by unapproved alterations to any part of the structure shall be deducted from contract amount.	○ Yes ○ No
* (Bells and Clocks) Coordinate the location of all items with architectural and structural features (including trim, columns, tile, appliances, cabinets, mirrors, etc.). Any items installed that will not allow the installation of designed features will be corrected at no additional cost.	○ Yes ○ No
* (Bells and Clocks) Provide all required hoisting for your scope of work. Andersen will not have a crane or forklift on site for subcontractor use. Provide unloading of own material. No long term stock piling of material on site due to limitation of space. Short term storage to be approved by Andersen supervision upon request.	○ Yes ○ No
* (Bells and Clocks) Provide all acoustic, seismic and vibrations control as indicated in the project documents, governing authorities or as normally required for a complete system.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Bells and Clocks) Address in your proposal the method for this scope of work/system to remain operational prior to demolition & after demolition is complete. Since demolition will be performed by multiple companies, and in a phased fashion, include costs to install temporary isolation valves if necessary so that buildings and individual "sectors" can be isolated for shut off independently. Coordinate work as necessary with Demolition/Abatement contractors and/or local utility companies. It is intended to have utilities operational during the entire project construction. Some buildings/areas may be completed in advance of other buildings/areas and may need temporary utility feeds. Include the following components in your proposal. Participate in conversations & coordinate with local Fire Dept., PPS, Demo & Abatement contractors to facilitate this goal.	○ Yes ○ No
* (Bells and Clocks) Include new system coverage as early as possible with respects to Fire/Life Safety systems. Include all costs to cut, cap, drain, etc. to prepare system for demolition by others. If your intent is to reuse any part of the existing system, please indicate on proposal form what components you intend to reuse. Include removal and salvage of items related to this system identified in demolition spec (If applies). a. Main Building (Sectors A, B, E, G1, G2, D, I) Isolated from Auditorium-Sector A for some of the work b. Demolition & Construction of New Sectors C, F, H c. Demolition of existing Auto shop d. Relocation of Fire Line (if required) by Civil Contractor e. Maintaining Service with Existing/New Hydrants as pertains to your scope of work. f. Maintaining Temp Power, Gas, Water, Waste as pertains to your scope of work	○ Yes ○ No
* (Bells and Clocks) Refer to Owner Salvage Listing for all items that are required to be salvaged on this project. Perform Salvage work for same items that are included in New work to be removed, packaged, and transferred to a storage location within 25 miles of jobsite.	○ Yes ○ No

powered by BUILDINGCONNECTED

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Bells and Clocks) It is assumed that the scope of work for demolition and new construction for the Utility Trench(es) will be scoped with typical 5' rule for utilities by Plumbing, Waste, Fire. Assume Civil Contractor will install new utility trench and/or extensions if required. Exception: Electrical is assumed to be located in a separate utility trench (if not already indicated as direct bury) and will be completely furnished & installed (trench, conduit, wiring, etc.) by the electrical contractor if required.	○ Yes ○ No
* (Bells and Clocks) Be responsible for the start-up and commissioning of the fire protection system. Attend weekly commissioning coordination meetings, and complete all required start-up and commissioning test forms as required by the Commissioning Agency. Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (Bells and Clocks) Include all slab on grade demolition/excavation, and existing wall penetrations as needed to facilitate work included in this subcontract.	○ Yes ○ No
* (Bells and Clocks) Escalation: refer to RFP Instructions/Budget Breakdown form for price escalation requirements.	○ Yes ○ No
* (Bells and Clocks) Include all requirements to safely handle lead/lead content shall be included in this scope of work, and performed by this contractor. Assume all existing surfaces include lead contaminates. A separate abatement contractor will not be hired to abate lead.	○ Yes ○ No
* (Bells and Clocks) Coordinate work, including layout for work to be performed by others regarding Asbestos abatement (must be performed by Abatement contractor).	○ Yes ○ No
* (Bells and Clocks) Incudes all required excavation and backfill for the plumbing underground scope of work for the remaining work on site drawings (within 5' of building) and for work under slab on grade. The slab on grade will be removed by others, trenching & piping placement is included in this scope of work, and includes layout of plumbing under slab utilities, including staking and pot-hole verifications.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

*	(Bells and Clocks) Provide line and grade for own work from grid lines and elevation bench marks provided by others.	○ Yes ○ No
*	(Bells and Clocks) Include all requirements pertaining to this scope of work as indicated on LEED Score Card	○ Yes ○ No
*	(Bells and Clocks) Price to include all welding required for your scope of work including protection of other trades work.	○ Yes ○ No
*	(Bells and Clocks) Review scope of work below regarding temporary services to facilitate demolition and/or construction operations (trailer area and onsite requirements). Include all work, including planning, permitting, etc. for items that are temporary in nature to facilitate project. If design is required solely for temporary items, include in this scope of work.	○ Yes ○ No
*	(Bells and Clocks) Portland Public School Standards have been provided for reference only. Include a scoping letter that states that your bid complies with every item in the PPS standards, and if not, provide a marked up version of the PPS standards explaining requested changes to match bid.	○ Yes ○ No
*	(Bells and Clocks) It is understood that this project may exceed code minimum. If bidder would like to submit Value Engineering to provide code minimum, ONLY, specify item in spec/PPS standards and deviation that is proposed to reach code minimum ONLY.	○ Yes ○ No
*	(Bells and Clocks) Provide all identification markers, labels, tags and related signage per the contract documents and local code/AHJ.	○ Yes ○ No
*	(Bells and Clocks) Coordinate with electrical contractor/designers for all power requirements related to your scope of work. Any changes caused by this subcontractor which affects the scope of the electrical firm will be the responsibility of this subcontractor.	○ Yes ○ No
*	(Bells and Clocks) Coordinate the location of all items included in your scope of work with architectural and structural features (including trim, white boards, misc. wall mounted items, etc.). Any items installed that will not allow the installation of designed features will be corrected at no extra cost, provided that these design features were apparent at the time of installation.	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* (Bells and Clocks) Provide all testing, sterilization and certification of all systems as required by contract documents or as required by governing authorities.	○ Yes ○ No
* (Bells and Clocks) Andersen will provide egress lighting (via electrical subcontractor scope), each contractor is responsible for their own task lighting.	○ Yes ○ No
* (Bells and Clocks) Each subcontractor is required to complete start-up forms provided by the commissioning agent. All commissioning documentation will need to be completed by the dates shown on the commissioning schedule, published by Andersen. Refer to LEED Documentation for commissioning requirements/level of commissioning.	○ Yes ○ No
* (Bells and Clocks) Subcontractor shall take field measurements of tight or congested areas prior to fabrication of materials. Modifications to the Subcontractor's work due to the Subcontractor's failure to field measure these key areas will be at the Subcontractor's expense. The use of the BIM coordination plan will be used to the greatest extent possible, however, due to timing of the Existing Conditions Building Scan, and incorporation into Revit, some items may require field verification to continue design/coordination without the scan fully available/incorporated.	○ Yes ○ No

(BELLS AND CLOCKS) SPECIFIC ITEMS:

* (Bells and Clocks) Provide all required labor, material, equipment, wiring, and devices for the Bells & Clock systems as described in project documents. Includes all design, drawings, and start-up for a complete, functioning system. Please note this scope is Design Assist.	○ Yes ○ No
* (Bells and Clocks) Provide design, fabrication, furnish and installation for the Bells & Clocks specification sections and all division 00 and 01 requirements.	○ Yes ○ No
* (Bells and Clocks) Bells & Clocks shall include all own conduit and wire, as needed (most of system is wireless).	○ Yes ○ No
* (Bells and Clocks) BIM requirements for this scope of work are limited to providing information for the Div. 26 electrical contractor to represent in the model (supply CAD documents to Div. 26 contractor). Attend clash detection meetings to resolve issues with this scope of work (modify shop drawings as needed, and communicate with the Div. 26 subcontractor)	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

GENERAL ACKNOWLEDGMENTS

Mark "yes" to all yes/no questions »

BUDGET SUMMARY (DIRECT COST SUBTOTAL OF EACH BUILDING FROM ABOVE):

* Demo of 1916 Boiler House & 1953 Science Wing (Safe-Off Only)	$
* Demo of 1918 South Shop Wing (Safe-Off Only)	$
* Demo of 1953 Automotive Building (Safe-Off Only)	$
* Building A - 1930 Auditorium Building	$
* Building B - 1991 Library Building	$
* Building C - New North Wing w/ Salvaged 1917 Historic Wall	$
* Building D - 1917 Foundry Building	$
* Building E - 1916 Main Building	$
* Building F - New Commons Building	$
* Building G1 - 1925 Aux Gym Building	$
* Building G2 - 1964 Main Gym Building	$
* Building H - New South Shop Building	$
* Building I - 1992 KBPS Building	$
* Sitework - ADA Ramp - Buckman Improvements	$
* Sitework - On-Site Improvements (within Benson Property Line)	$
* Sitework - ROW - Right-of-Way Improvements	$

SUMMARY INDIRECTS:

* Overhead & Profit Total All Buildings & Site Categories	$
* Preconstruction Total All Buildings & Site Categories	$
* BIM - During Preconstruction (up to 50% CD) Total all Buildings & Site Categories	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* BIM - During Construction (after 50% CD) Total all Buildings & Site Categories	$
* Oregon Corporate Activities Tax	$
* OCIP Credit	$
* Performance & Payment Bond	$

ALL ANDERSEN RFP DOCUMENTS (SEE FILE 00 RFP TABLE OF CONTENTS FOR COMPLETE LISTING):

* 01 Request for Proposals & Instructions	○ Yes ○ No
* 02 Estimating Forms (Use Building Connected)	○ Yes ○ No
* 03 Scope of Work (Use Building Connected)	○ Yes ○ No
* 04 Document Listing	○ Yes ○ No
* 05 Project Schedules	○ Yes ○ No
* 06 Subcontractor Prequalification Requirements	○ Yes ○ No
* 07 Subcontractor Agreement Form and All Exhibits (Key Exhibits Highlighted Below, See TOC for Complete Listing)	○ Yes ○ No
* 07 SC Exhibit 5 Site Specific Work Regulations	○ Yes ○ No
* 07 SC Exhibit 5.1 BHS PPS/Andersen Prime Agreement	○ Yes ○ No
* 07 SC Exhibit 5.2 Career Learning Requirements	○ Yes ○ No
* 07 SC Exhibit 5.3 Contractor Workforce Training & Hiring Program	○ Yes ○ No
* 07 SC Exhibit 5.4 Insurance Requirements - PPS OCIP Guidebook & Enrollment Forms - Sample	○ Yes ○ No
* 07 SC Exhibit 5.5 Insurance Requirements - PPS Non-OCIP - Sample	○ Yes ○ No
* 07 SC Exhibit 5.6 BIM Execution Plan	○ Yes ○ No
* 07 SC Exhibit 5.7 BOLI Wage Rates (July 2019 Booklet for Reference Only)	○ Yes ○ No
* 07 SC Exhibit 6 Site Logistics Plan	○ Yes ○ No
* 07 SC Exhibit A Safety Handbook 2018	○ Yes ○ No

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

* 07 SC Exhibit B Anti-Harassment Policy 2018	○ Yes	○ No
* 07 SC Exhibit C Safety Disciplinary Policy	○ Yes	○ No

DOCUMENT LISTING (SEE TABLE OF CONTENTS FOR FULL LISTING):

* Bassetti 100% Schematic Design Package dated August 19, 2019	○ Yes	○ No
* PPS Standards	○ Yes	○ No
* Record Drawings	○ Yes	○ No
* Environmental, Historical, and Diligence Reports	○ Yes	○ No

SUBMITTAL AND PRODUCT DELIVERY ARE IMPORTANT FACTORS IN CONTRACT AWARD; PROVIDE THE FOLLOWING SCHEDULE INFORMATION:

Submittals - list number of days required to complete	*input response here*
Product Data - list number of days required to complete	*input response here*
Shop Drawings - list number of days required to complete	*input response here*
Material Lead Time (after approved submittals) - list number of days	*input response here*
Date of Material / Equipment Delivery FOB jobsite	*input response here*

BOND INFORMATION

* Provide added cost for performance and payment bond	$

FEES AND MARKUPS

* Mark up on Own Work (Max 15% Labor, 10% Equipment, 10% Materials)	%
* Mark up on lower tier subs (Max 10% for $0-$5k, 5% for >$5k)	%

LABOR RATES

Foreman Standard Time	per hour	$

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

Foreman Time-and-a-Half	per hour	$
Foreman Double Time	per hour	$
Journeyman Standard Time	per hour	$
Journeyman Time-and-a-Half	per hour	$
Journeyman Double Time	per hour	$
Apprentice Standard Time	per hour	$
Apprentice Time-and-a-Half	per hour	$
Apprentice Double Time	per hour	$
Other Standard Time	per hour	$
Other Time-and-a-Half	per hour	$
Other Double Time	per hour	$

CERTIFICATIONS

* Is your firm a state certified Minority Business Enterprise?	○ Yes ○ No
* Is your firm a state certified Women-Owned Business Enterprise?	○ Yes ○ No
* Is your firm a state certified Emerging Small Business?	○ Yes ○ No
* Is your firm a state certified Disadvantaged Business Enterprise?	○ Yes ○ No
* Is your firm a state certified Disabled Veteran-Owned Business Enterprise?	○ Yes ○ No
* Is your firm union or non-union?	*input response here*

DISCLAIMERS AND CLARIFICATIONS

Andersen is an equal opportunity employer and strongly encourages the participation of emerging small business, women-owned, disadvantaged, disabled veterans and minority enterprises.

IN SUBMITTING THIS BID, YOUR FIRM AGREES TO THE FOLLOWING CONDITIONS:

To hold bid open for the number of days as specified in the Request for Bids and Bid Instruction

AOR-1907: Benson High School - Trade Package 1

Portland, OR, United States of America

To accept the provisions of the Front End Documents and Divisions 00 and 01 specifications

To enter into and execute an unmodified Subcontract / Purchase Agreement if awarded on the basis of this bid

To accomplish the Work in accordance with the Contract Documents

To commence work under this contract immediately when directed and substantially complete the work within the durations shown on the project schedule

ATTACHMENTS

⊕ *upload files*

Benson High School Modernization
Trade Package 1 - MEP/FP

Cost Inclusion Matrix

Cost Item	Preconstruction Services Fee	General Conditions	Cost of the Work	Overhead & Profit %	by Andersen	by PPS	Comments
Preconstruction Services	X						Scope to be issued in Addendum #1.
Estimating and budgeting including labor, software and quantity surveying	X						
Bidding and buyout	X						
Site investigation/exploration during Preconstruction	X						
Estimate deliverables and documents	X						
Value engineering analysis	X						
Cost studies	X						
Attending design and other preconstruction meetings	X						
Home office overhead				X			
Home office rental charges				X			
Accounting, payroll and data entry				X			
Secreterial/office adminstration				X			
Profit				X			
Subcontractor's capital expenses				X			
Merit, incentive payments, bonuses, awards or any related expenses				X			
Fines and penalties incurred by Subcontractor				X			
Costs to support audits				X			
Subsistence/travel costs for field labor				X			
Project executive				X			
Salaries or wages of staff not stationed at the site unless otherwise approved by Andersen				X			
Warranty repair costs				X			
Correction of defective work caused by Subcontractor				X			
Re-inspection costs for Subcontractor's defective work				X			
Licensing, credentialing and certification costs for Subcontractor and/or Subcontractor's employees				X			
Subcontractor employee training costs				X			
Subcontractor's site trailer		X					
Subcontractor's site office trailer utility connections, bills and disconnect		X					
Site office supplies		X					
Site office equipment (copiers/scanners/phones)		X					
Project manager Labor		X					Develop Rate for Labor Inc. all Labor, Auto, Fuel, Computer
Project engineers Labor		X					Develop Rate for Labor Inc. all Labor, Auto, Fuel, Computer
Project management Labor		X					Develop Rate for Labor Inc. all Labor, Auto, Fuel, Computer
Project management staff phones and computers		X					Develop Rate for Labor Inc. all Labor, Auto, Fuel, Computer
Superintendent Labor		X					
Travel and subsistence for project management staff		X					Only for approved offsite travel
Onsite Trailer, and facilities		X					As approved by Andersen
Blueprinting and reproduction costs for Architect- provided drawings and project manuals		X					
Scheduling and scheduling software		X					
BIM support and related services			X				Include Software outlined in BIM Execution Plan
Safety professional			X				
Field Labor, including all non-supervisory work: General Foreman, Foreman, Journeyman, Apprentice labor			X				Refer to Labor Cost Breakdown for additional information
Field layout and detailing			X				
Site coordination, safety, foreman, scheduling and other site meetings			X				
Shop drawing preparation costs			X				

Cost Item	Preconstruction Services Fee	General Conditions	Cost of the Work	Overhead & Profit %	by Andersen	by PPS	Comments
Shop fabrication			X				
Lower tier subcontracts			X				
Permanent materials installed at the site			X				
Permanent equipment installed at the site			X				
Temporary materials utilized in the execution of the work onsite			X				
Material deliveries to site			X				
Site rental equipment			X				
Small tools			X				
Safety equipment and supplies			X				
First aid supplies			X				
Drinking water			X				
Site housekeeping			X				
Ladders, access, man hoists/lifts, scaffolding for Subcontractor's work only			X				
Parking costs for Subcontractor's labor			X				
Site vehicles utilized by site labor/foremen			X				
Hoisting, forklifts, cranes and rigging for Subcontractor's work only			X				
Fuel for site vehicles and equipment			X				
"Trade" permit fees			X				
Design/build or delegated design engineering fees			X				
Mockups and quality control program			X				
Air test and balance services			X				
Commissioning support and startup labor and documentation			X				
Temporary stair towers					X		
Site recycling/waste disposal costs-Unless described as part of subcontractor scope (such as demo/abate/drywall scopes)					X		Please note: Salvage rights, if any will be described in Owner Salvage Listing
Badging/background check costs				X			Prime Agreement does not allow for Badging costs to be charge to project. Badging will not be required approx. July 2021-July 2024 while site is classified as "open site"
OCIP (as per Prime Agreement)-Gen. Liability Insurance				Deductible only (Fee Reduction)		X	Deductible costs are chargable to the party that caused the loss FEE reduction
Performance and payment bond premium (if required by Andersen or PPS)			X				
Builder's risk insurance				Deductible only (Fee Reduction)		X	Deductible costs are chargable to the party that caused the loss FEE reduction
All other insurance, including Offsite, Auto, Workman's comp, Prof. Liability			X			X	
PGE utility connection fees (permanent power only)						X	
Systems Development Charges (SDC's)						X	
Commercial building permit intake/plan review fees						X	
Third party structural observation and testing firm services						X	
Commissioning agent services						X	
Building envelope quality control firm services						X	
Hazardous material removal, monitoring and surveys					X	X	

INSURANCE CREDIT WORKSHEET (FORM 1-C)
PORTLAND PUBLIC SCHOOLS OCIP

PROJECT NAME: _____

CONTACT INFO:

Sub-contractor Name: _____

Address, City, ST Zip Code: _____

Contact Person: _____ Title: _____

Phone: _____ Fax: _____

email: _____

CONTRACT DETAILS:

Work Performed: _____

% Self-Performed: _____

Are you performing: ____ Asbestos removal ___ Hazardous waste remediation ___

Supplying materials ONLY ___

Premium is based on: Sales/Receipts ___ Contract Amount: $ _____

Payroll ___ Est. Payroll Amount: $ _____

Other ___ Please describe: _____

GL Rate: $ _____

Premium is calculated (pick one): Per $100 ___ Per $1,000 ___

Calculated Premium: $ _____

By signing below, I hereby warrant that the information provided on this Worksheet is complete and accurate to the best of my knowledge. I will provide documentation from my **CGL policy** that supports the information on this Worksheet. I agree that my payroll may be audited in the event that my reported payroll is less than the industry standard for my trade.

_____ _____ _____

Signature **Title** **Date**

Please complete and return via fax at **512-676-4347** or email to brandee@buildersprotect.com.

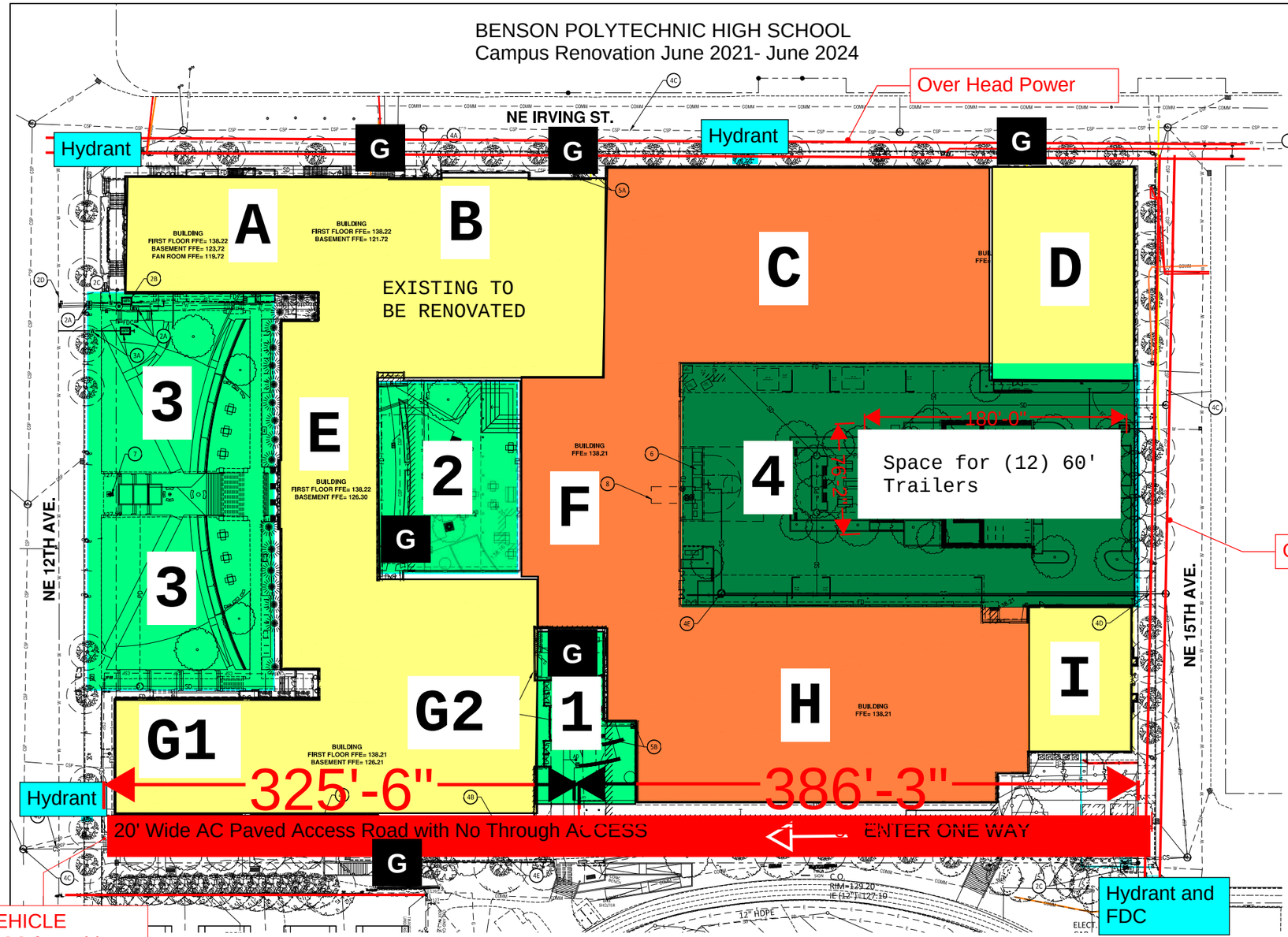
Your GL Rate and Declarations pages must accompany this worksheet!

	Notes	Size/Area	Power	Lighting	Internet	Gas	Climate Control	Water	Sanitary Waste Tie In	Roof Drain
Colo	Off Site-Adjacent to Site	Assume 10ksf building; Occupancy 50 People & Meeting Rooms	120/208v 400A Service	Interior and Parking	Yes-Provide service to Colo -Fiber to COLO + Wifi inside trailer	Assume none required.	Heat Pumps	Yes, for Break room and Toilet/Shower Rooms	Yes	per code
Site	Staging & Dry Shacks (12) 10'x 60' Mobile Trailers.	28ksf located on Exisitng Auto shop building footprint	200A 480/277 Service with 75kva Skid **** See note below.**	at Staging areas and for site security & Egress	Fiber to Campus + WIFI	Existing Gas Locations POC on graphic "G"	Units Built into trailers	Potable- Bottled Water Sevice. Non potable Service for concrete wash out located East of building F and Centered. Two Wash Car Tie ins Exterior location for wheel wash hose location-Hydrant meter may be acceptable (Excavation subcontractor shall provide all hydrant meter & costs for same)	Two Wash Car Tie Ins	N/A
Building A	Historical Reno/CIP Concrete	3 levels @ 42,174 gsf	100A 120/208 service	LED Egress	WIFI	Provide Gas distribution per climate control column	Maintenance of Historical temperatures & Humidity. Include summer cooling. 30A 220v & 30A 480V required. 36 month program.	Extend Wirsbo around perimeter of building with HB every 100'. Valve to drain line during freezing temps.	N/A	Temp to outside
Building B	Reno/Steel	3 levels @ 42,851 gsf	200A 120/208 service	LED Egress	WIFI	Provide Gas distribution per climate control column	One air exchange per hour. 60 degree min temperature. 40-45% RH, (1) 56A 120v and (1) 35A 220v required. 6 mo. duration.	Extend Wirsbo around perimeter of building with HB every 100'. Valve to drain line during freezing temps.	N/A	Temp to outside
Building E	Historical Reno/ Wood	3 levels @ 32,481gsf	100A 120/208 Service	LED Egress	WIFI	Provide Gas distribution per climate control column	Maintenance of Historical temperatures & Humidity. Include summer cooling. 30A 220v & 30A 480V required. 36 month program.	Extend Wirsbo around perimeter of building with HB every 100'. Valve to drain line during freezing temps.	N/A	Temp to outside
Building F	Demo/New/ Steel	2 levels @ 38,372	100A 480/277 Service with 75kva Skid **** See note below.**	LED Egress	WIFI	Provide Gas distribution per climate control column	One air exchange per hour. 60 degree min temperature. 40-45% RH, (1) 56A 120v and (1) 35A 220v required. 6 mo. duration.	Extend Wirsbo around perimeter of building with HB every 100'. Valve to drain line during freezing temps.	N/A	Temp to outside
Building C	Demo/New/ Steel	2 levels @ 77,592sf	100A 480/277 Service with 75kva Skid **** See note below.**	LED Egress	WIFI	Provide Gas distribution per climate control column	One air exchange per hour. 60 degree min temperature. 40-45% RH, (2) 56A 120v and (2) 35A 220v required. 6 mo. duration	Extend Wirsbo around perimeter of building with HB every 100'. Valve to drain line during freezing temps.	N/A	Temp to outside

	Notes	Size/Area	Power	Lighting	Internet	Gas	Climate Control	Water	Sanitary Waste Tie In	Roof Drain
Colo	Off Site-Adjacent to Site	Assume 10ksf building; Occupancy 50 People & Meeting Rooms	120/208v 400A Service	Interior and Parking	Yes-Provide service to Colo -Fiber to COLO + Wifi inside trailer	Assume none required.	Heat Pumps	Yes, for Break room and Toilet/Shower Rooms	Yes	per code
Building D	Reno/ Wood	2 levels @ 17,751sf	100A 120/208 Service	LED Egress	WIFI	Provide Gas distribution per climate control column	One air exchange per hour. 60 degree min temperature. 40-45% RH, (1) 56A 120v and (1) 35A 220v required. 6 mo. duration.	Extend Wirsbo around perimeter of building with HB every 100'. Valve to drain line during freezing temps.	N/A	Temp to outside
Building G1	Historical Reno/ URM/ Concrete	Gym, 2 levels @ 39,101sf	100A 120/208 Service	LED Egress	WIFI	Provide Gas distribution per climate control column	Maintenance of Historical temperatures & Humidity. Include summer cooling. 30A 220v & 30A 480V required. 36 month program.	Extend Wirsbo around perimeter of building with HB every 100'. Valve to drain line during freezing temps.	N/A	Temp to outside
Building G2	Reno/ Tilt Concrete	Gym, 2 levels @ 31,407sf	100A 120/208 Service	LED Egress	WIFI	Provide Gas distribution per climate control column	One air exchange per hour. 60 degree min temperature. 40-45% RH, (1) 56A 120v and (1) 35A 220v required. 6 mo. duration.	Extend Wirsbo around perimeter of building with HB every 100'. Valve to drain line during freezing temps.	N/A	Temp to outside
Building H	Demo/New/ Steel	2 levels @ 73,384sf	100A 480/277 Service with 75kva Skid **** See note below.**	LED Egress	WIFI	Provide Gas distribution per climate control column	One air exchange per hour. 60 degree min temperature. 40-45% RH, (2) 56A 120v and (2) 35A 220v required. 6 mo. duration.	Extend Wirsbo around perimeter of building with HB every 100'. Valve to drain line during freezing temps.	N/A	Temp to outside
Building I	Occupied Reno (Radio Station)-Maintain Services at All Times	1 level @ 6,823sf	50A 120/208 Service	Task Lighting	Fiber Connection via Local Utility	Maintain Existing service	Occupied Space	Existing service	N/A	Occupied Space

**** Recommend Temp power skid with 100 amp 480 panel, 75 kva xfrmr 200 amp 120/208 3 phase service**

BENSON POLYTECHNIC HIGH SCHOOL
Campus Renovation June 2021- June 2024



PLAN SCALE
0 30' 60'
SCALE: 1"= 30'

SHEET NOTES
REFER TO TO NARRATIVE FOR DESCRIPTION OF IMPROVEMENTS.

KEYNOTES
1A. EXISTING DUAL 2" DOMESTIC WATER SERVICES, METERS, AND VAULT TO REMAIN.
1B. NEW 4" DOMESTIC REDUCED PRESSURE BACKFLOW PREVENTER ASSEMBLY IN NEW ABOVE-GRADE VAULT. (LOCATE BACKFLOW ASSEMBLY IN FAN ROOM AS ALTERNATE).
1C. NEW 4" WATER SERVICE TO BUILDING.
1D. EXISTING PUBLIC WATER MAIN.

2A. EXISTING 6" FIRE SERVICE, BACKFLOW ASSEMBLY, AND VAULT TO REMAIN. INSTALL NEW 6" CHECK VALVE WITHIN THE VAULT AND EXTEND 6" PIPING TO A NEW FIRE DEPARTMENT CONNECTION ADJACENT TO THE VAULT. INSTALL NEW 6" PIPING TO THE NEW BUILDING RISER LOCATION.
2B. EXISTING 8" FIRE SERVICE TO REMAIN. INSTALL NEW 8" DOUBLE CHECK DETECTOR BACKFLOW ASSEMBLY IN BELOW-GRADE VAULT AND EXTEND 8" PIPING TO THE BUILDING RISER LOCATION.
2C. EXISTING 6" FIRE SERVICE, BACKFLOW ASSEMBLY, AND VAULT SERVING THE KPBS BUILDING TO REMAIN.

3. NEW 2" IRRIGATION SERVICE AND NEW DOUBLE CHECK BACKFLOW ASSEMBLY IN BELOW-GRADE VAULT.

4A. EXISTING 12" COMBINED SEWER LATERAL TO REMAIN.
4B. NEW SANITARY SEWER LATERAL TO BUILDING.
4C. EXISTING PUBLIC COMBINED SEWER SYSTEM.
4D. NEW COMBINED SEWER LATERAL.
4E. NEW SANITARY SEWER MANHOLE PER CITY OF PORTLAND STANDARD DETAILS.

5A. EXISTING NATURAL GAS METER TO BE REMOVED.
5B. NEW NATURAL GAS METER AND PIPING.
5C. EXISTING GAS PIPING TO REMAIN.

6. TRASH ENCLOSURE TO BE EQUIPPED WITH SANITARY DRAINS, TRAP PRIMERS, AND VENTING. INCLUDE CAN WASH IN ENCLOSURE NEAR KITCHEN.

7. EXISTING PUBLIC BUBBLER FOUNTAIN TO REMAIN. INCLUDE AN ALLOWANCE TO RELOCATE FOUNTAIN 25' FROM EXISTING LOCATION, REPLACE EXISTING WATERLINE, AND INSTALL A 1" DOUBLE CHECK BACKFLOW ASSEMBLY IN A BELOW-GRADE UTILITY BOX.

8. APPROXIMATE LOCATION OF EXISTING PREVIOUSLY DECOMMISSIONED UNDERGROUND STORAGE TANK TO BE REMOVED.

NOTES TO ESTIMATOR
1. IN ADDITION TO WHAT IS SHOWN IN THE PLAN, INCLUDE AN ALLOWANCE FOR THE FOLLOWING:
   A. 6 SANITARY SEWER CLEANOUTS.
   B. 3 SANITARY SEWER MANHOLES.
   C. 300 LF OF 6"SS PIPING.
   D. 300 LF OF 8"W PIPING.
   E. 100 LF OF NATURAL GAS PIPING.

Yellow Indicates Existing to be RENOVATED

Orange Indicates Existing to be DEMOLISHED and REBUILT with New Buildings

# Indicates Courtyard/ Open Area

G Indicates Natural Gas POC

BENSON POLYTECHNIC HIGH SCHOOL
Campus Renovation June 2021- June 2024

Builder of Choice
ANDERSEN CONSTRUCTION COMPANY

90% SCHEMATIC DESIGN

01 January, 2012

PPS
503 Dixon Street
Portland, Oregon 97227
T (503) 916 3778

bassetti architects
721 NW 9th Ave, Suite 350
Portland, Oregon 97209
T (503) 224 9162 F (206) 340 9519

CIVIL ENGINEER
BHE Group
940 Willamette St., Suite 310
Eugene, OR 97401
1 541-686-847

LANDSCAPE ARCHITECT
Mayer/Reed
319 SW Washington #820
Portland, OR 97204
1 503-223-5953

STRUCTURAL ENGINEER
KPFF
111 SW Fifth Ave., Suite 2500
Portland, OR 97204
1 503-764-0326

MECHANICAL ENGINEER
PAE Engineering
522 SW 5th Ave., Suite 1500
Portland, OR 97204
1 503-596-8619

ELECTRICAL ENGINEER
Reyes Engineering
321 NE Couch St., Suite 403
Portland, OR 97232
1 503-771-1986

LIGHTING CONSULTANT
O-LLC Lighting Design
5831 N. Albina Ave.
Portland, OR 97217
1 503-341-7882

FOOD SERVICE CONSULTANT
JBK Consulting and Design, Inc.
6217 NE Cherry Drive
Hillsboro, OR 97124
1 503-686-8958

AUDIO VISUAL CONSULTANT
Greenbusch Group
1900 W Nickerson St, Suite 201
Seattle, WA 98119
1 206-378-0999

THEATER CONSULTANT
PLA Designs
5285 NE Elam Young Pkwy
Suite B500
Hillsboro, OR 97124
1 503-624-2188

HISTORIC PRESERVATION
Architectural Resources Group
111 SW Fifth Ave., 24th Floor
Portland, OR 97202
1 971-256-5324

HAZMAT CONSULTANT
PBS Engineering and Environmental
4412 SW Corbett Ave
Portland, OR 97239
1 503-248-3968

ENERGY/ENVIRONMENTAL
Lensa Consulting
7205 SE 16th Ave
Portland, OR 97202
1 503-467-1239

ONE INCH
AT FULL SIZE

#	REVISIONS	DATE

KEY PLAN

Client Name
PPS Benson Polytechnic High School Modernization

546 NE 12th Ave, Portland, OR 97232

JOB NO: 16995
ISSUE DATE: 4.22.2019
Jurisdiction Stamp Area

SITE SANITARY SEWER, WATER, AND GAS PLAN

C2.01

Benson Highschool 100% SD Drawing List

EXHIBIT #3: DOCUMENT LIST

September 6th, 2019

The following document list is included as a further clarification regarding the Contract Documents that are incorporated into this Agreement.

Discipline	Type	Number	Title	Revision Date
GENERAL				
		G0.01	COVER SHEET	8/19/19
		G0.02	DRAWING INDEX & PROJECT DATA	8/19/19
		G1.01	ARCHITECTURAL SITE PLAN	8/19/19
		G2.01	CODE ANALYSIS - ALLOWABLE AREA	8/19/19
		G2.11	CODE ANALYSIS - LOWER LEVEL PLAN	8/19/19
		G2.12	CODE ANALYSIS - LEVEL 1 PLAN	8/19/19
		G2.13	CODE ANALYSIS - LEVEL 2 PLAN	8/19/19
		G2.21	OCCUPANT LOAD SCHEDULES	8/19/19
		G2.31	PLUMBING FIXTURE CALCULATIONS	8/19/19
DEMOLITION				
		AD2.00	DEMO PLAN - COMPOSITE LOWER LEVEL	8/19/19
		AD2.01	DEMO PLAN - COMPOSITE LEVEL 1	8/19/19
		AD2.02	DEMO PLAN - COMPOSITE LEVEL 2	8/19/19
		AD2.03	DEMO PLAN - COMPOSITE ROOF	8/19/19
CIVIL				
		SU 1.00	SITE SURVEY	8/28/15
		SU 2.00	SITE SURVEY	8/28/15
		SU 3.00	SITE SURVEY	8/28/15
		C1.01	SITE STORM DRAIN PLAN	8/19/19
		C2.01	SITE SANITARY SEWER, WATER, AND GAS PLAN	8/19/19
		C3.01	RIGHT-OF-WAY IMPROVEMENTS PLAN - BASE	8/19/19
		C3.02	RIGHT-OF-WAY IMPROVEMENTS PLAN - ALTERNATE	8/19/19
		C4.01	SITE VEHICULAR AREA GRADING PLAN	8/19/19
		C5.01	VEHICULAR ACCESS, PARKING, AND LOADING PLAN	8/19/19
LANDSCAPE				
		L101	SITE RENDERING	8/19/19
		L102	SITE KEY	8/19/19
		L110	SITE - PARTIAL PLAN - MAIN ENTRY / SOCIAL CTYDS	8/19/19
		L111	SITE - PARTIAL PLAN - CTE COURTYARD	8/19/19
		L112	SITE - PARTIAL PLAN - NE CORNER AND S. EDGE	8/19/19
		L120	SITE SECTIONS	8/19/19
ARCHITECTURAL				
		A1.01	LOWER LEVEL COMPOSITE FLOOR PLAN	8/19/19
		A1.02	LEVEL 1 COMPOSITE FLOOR PLAN	8/19/19
		A1.03	LEVEL 2 COMPOSITE FLOOR PLAN	8/19/19
		A1.04	COMPOSITE ROOF PLAN	8/19/19
		A2.01	LOWER LEVEL PLAN - BLDG A	8/19/19
		A2.02	LOWER LEVEL PLAN - BLDG B	8/19/19
		A2.05	LOWER LEVEL PLAN - BLDG E	8/19/19
		A2.06	LOWER LEVEL PLAN - BLDG G1 (AUX GYM)	8/19/19
		A2.07	LOWER LEVEL PLAN - BLDG G2 (MAIN GYM)	8/19/19
		A2.11	LEVEL 1 PLAN - BLDG A	8/19/19

Benson Highschool 100% SD Drawing List

EXHIBIT #3: DOCUMENT LIST

September 6th, 2019

The following document list is included as a further clarification regarding the Contract Documents that are incorporated into this Agreement.

Discipline	Type	Number	Title	Revision Date
		A2.12	LEVEL 1 PLAN - BLDG B	8/19/19
		A2.13	LEVEL 1 PLAN - BLDG C	8/19/19
		A2.14	LEVEL 1 PLAN - BLDG D	8/19/19
		A2.15	LEVEL 1 PLAN - BLDG E/F	8/19/19
		A2.16	LEVEL 1 PLAN - BLDG G1 (AUX GYM)	8/19/19
		A2.17	LEVEL 1 PLAN - BLDG G2 (MAIN GYM)	8/19/19
		A2.18	LEVEL 1 PLAN - BLDG H	8/19/19
		A2.19	LEVEL 1 PLAN - BLDG H/I	8/19/19
		A2.21	LEVEL 2 PLAN - BLDG A	8/19/19
		A2.22	LEVEL 2 PLAN - BLDG B	8/19/19
		A2.23	LEVEL 2 PLAN - BLDG C	8/19/19
		A2.24	LEVEL 2 PLAN - BLDG D	8/19/19
		A2.25	LEVEL 2 PLAN - BLDG E/F	8/19/19
		A2.26	LEVEL 2 PLAN - BLDG G1 (AUX GYM)	8/19/19
		A2.27	LEVEL 2 PLAN - BLDG G2 (MAIN GYM)	8/19/19
		A2.28	LEVEL 2 PLAN - BLDG H	8/19/19
		A2.29	LEVEL 2 PLAN - BLDG H/I	8/19/19
		A3.01	OVERALL EXTERIOR ELEVATIONS	8/19/19
		A3.02	OVERALL EXTERIOR ELEVATIONS	8/19/19
		A3.03	OVERALL EXTERIOR ELEVATIONS	8/19/19
		A3.13	BUILDING C ELEVATIONS	8/19/19
		A3.17	BUILDING G ELEVATIONS	8/19/19
		A4.10	BUILDING A SECTIONS	8/19/19
		A4.11	BUILDING A SECTIONS	8/19/19
		A4.12	BUILDING A SECTIONS	8/19/19
		A4.13	BUILDING B SECTIONS	8/19/19
		A4.14	BUILDING C/D SECTIONS	8/19/19
		A4.15	BUILDING C/D SECTIONS	8/19/19
		A4.16	BUILDING E SECTIONS	8/19/19
		A4.17	BUILDING E SECTIONS	8/19/19
		A4.18	BUILDING F SECTIONS	8/19/19
		A4.19	BUILDING F SECTIONS	8/19/19
		A4.20	BUILDING G SECTIONS	8/19/19
		A4.21	BUILDING G SECTIONS	8/19/19
		A4.22	BUILDING G SECTIONS	8/19/19
		A4.23	BUILDING H/I SECTIONS	8/19/19
		A4.24	BUILDING H/I SECTIONS	8/19/19
		A5.01	EXTERIOR WINDOW/DOOR TYPES	8/19/19
		A5.02	EXTERIOR WINDOW/DOOR TYPES	8/19/19
		A5.03	EXTERIOR WINDOW/DOOR TYPES	8/19/19
		A5.04	COMPOSITE ROOF PLAN (COLORIZED)	8/19/19
		A5.05	ROOF ASSEMBLIES	8/19/19
		A5.10	SD SUPPLEMENTAL EXTERIOR DETAIL SKETCHES	8/19/19

Benson Highschool 100% SD Drawing List

EXHIBIT #3: DOCUMENT LIST

September 6th, 2019

The following document list is included as a further clarification regarding the Contract Documents that are incorporated into this Agreement.

Discipline	Type	Number	Title	Revision Date
		A5.11	SD SUPPLEMENTAL EXTERIOR DETAIL SKETCHES	8/19/19
		A5.12	SD SUPPLEMENTAL DETAIL SKETCHES	8/19/19
		A6.10	ENLARGED TOILET PLANS AND ELEVATIONS	8/19/19
		A7.01	INTERIOR ELEVATIONS - BLDG A THEATER	8/19/19
		A7.02	INTERIOR ELEVATIONS - BLDG A THEATER	8/19/19
		A7.41	INTERIOR ELEVATIONS - BLDG E ENTRY & CORRIDOR	8/19/19
		A7.51	INTERIOR ELEVATIONS - BLDG F COMMONS	8/19/19
		A7.52	INTERIOR ELEVATIONS - BLDG F COMMONS	8/19/19
		A7.71	INTERIOR ELEVATIONS - BLDG G2 GYMNASIUM	8/19/19
		A7.72	INTERIOR ELEVATIONS - BLDG G2 GYMNASIUM	8/19/19
		A7.91	INTERIOR ELEVATIONS - BLDG H TYPICALS	8/19/19
		A7.92	INTERIOR ELEVATIONS - BLDG H TYPICALS	8/19/19
		A7.93	INTERIOR ELEVATIONS - BLDG H TYPICALS	8/19/19
		A8.01	COMPOSITE RCP - LOWER LEVEL	8/19/19
		A8.02	COMPOSITE RCP - LEVEL 1	8/19/19
		A8.03	COMPOSITE RCP - LEVEL 2	8/19/19
		A8.14	LEVEL 1 RCP - BLDG H	8/19/19
		A8.23	LEVEL 2 RCP - BLDG H	8/19/19
		A8.30	CTE CEILING INFRASTRUCTURE DIAGRAMS	8/19/19
		A8.31	CTE CEILING INFRASTRUCTURE DIAGRAMS	8/19/19
		A9.10	LOWER LEVEL COMPOSITE WALL TYPE PLAN	8/19/19
		A9.20	LEVEL 1 COMPOSITE WALL TYPE PLAN	8/19/19
		A9.20A	LEVEL 1 WALL TYPE PLAN - ALT 6	8/19/19
		A9.30	LEVEL 2 COMPOSITE WALL TYPE PLAN	8/19/19
		A9.30A	LEVEL 2 WALL TYPE PLAN - ALT 6	8/19/19
		A9.40	INTERIOR WINDOW/DOOR TYPES	8/19/19
		A9.41	HISTORIC INTERIOR WINDOW/DOOR TYPES	8/19/19
		A9.50	CASEWORK ASSEMBLIES	8/19/19
		A10.01	LOWER LEVEL COMPOSITE FINISH FLOOR PLAN	8/19/19
		A10.02	LEVEL 1 COMPOSITE FINISH FLOOR PLAN	8/19/19
		A10.03	LEVEL 2 COMPOSITE FINISH FLOOR PLAN	8/19/19
HISTORIC				
		H1.30	DEMO ROOF PLAN - COMPOSITE - HISTORIC TREATMENT	8/19/19
		H1.31	DEMO ROOF PLAN - BLDG A - HISTORIC TREATMENT	8/19/19
		H1.32	DEMO ROOF PLAN - BLDG D - HISTORIC TREATMENT	8/19/19
		H1.33	DEMO ROOF PLAN - BLDG E - HISTORIC TREATMENT	8/19/19
		H1.34	DEMO ROOF PLAN - BLDG G1 - HISTORIC TREATMENT	8/19/19
		H1.35	DEMO EXT ELEV - BLDG A - HISTORIC TREATMENT	8/19/19
		H1.36	DEMO EXT ELEV - BLDG C - HISTORIC TREATMENT	8/19/19
		H1.37	DEMO EXT ELEV - BLDG D - HISTORIC TREATMENT	8/19/19
		H1.38	DEMO EXT ELEV - BLDG E - HISTORIC TREATMENT	8/19/19
		H1.39	DEMO EXT ELEV - BLDG G1 - HISTORIC TREATMENT	8/19/19
		H2.30	ROOF PLAN - COMPOSITE - HISTORIC TREATMENT	8/19/19

Benson Highschool 100% SD Drawing List

EXHIBIT #3: DOCUMENT LIST

September 6th, 2019

The following document list is included as a further clarification regarding the Contract Documents that are incorporated into this Agreement.

Discipline	Type	Number	Title	Revision Date
		H2.31	ROOF PLAN - BLDG A - HISTORIC TREATMENT	8/19/19
		H2.34	ROOF PLAN - BLDG D - HISTORIC TREATMENT	8/19/19
		H2.35	ROOF PLAN - BLDG E - HISTORIC TREATMENT	8/19/19
		H2.36	ROOF PLAN - BLDG G1 - HISTORIC TREATMENT	8/19/19
		H3.11	EXT ELEV - BLDG A - HISTORIC TREATMENT	8/19/19
		H3.13	EXT ELEV - BLDG C - HISTORIC TREATMENT	8/19/19
		H3.14	EXT ELEV - BLDG D - HISTORIC TREATMENT	8/19/19
		H3.15	EXT ELEV - BLDG E - HISTORIC TREATMENT	8/19/19
		H3.16	EXT ELEV - BLDG G1 - HISTORIC TREATMENT	8/19/19
		H5.00	DOOR SCHEDULE - HISTORIC TREATMENT	8/19/19
		H5.01	WINDOW SCHEDULES - BLDG A - HISTORIC TREATMENT	8/19/19
		H5.03	WINDOW SCHEDULES - BLDG C - HISTORIC TREATMENT	8/19/19
		H5.04	WINDOW SCHEDULES - BLDG D - HISTORIC TREATMENT	8/19/19
		H5.05	WINDOW SCHEDULES - BLDG E - HISTORIC TREATMENT	8/19/19
		H5.06	WINDOW SCHEDULES - BLDG G1 - HISTORIC TREATMENT	8/19/19
		H5.07	SKYLIGHT SCHEDULE - HISTORIC TREATMENT	8/19/19
		H5.10	TYPICAL CONDITIONS AND REPAIRS - WINDOWS	8/19/19
		H5.11	TYPICAL CONDITIONS AND REPAIRS - EXTERIOR CONCRETE	8/19/19
		H5.12	TYPICAL CONDITIONS AND REPAIRS - EXTERIOR TERRACOTTA	8/19/19
		H5.13	TYPICAL CONDITIONS AND REPAIRS - EXTERIOR BRICK	8/19/19
STRUCTURAL				
		S0.01	DRAWING INDEX AND LIST OF ABBREVIATIONS	8/19/19
		S0.02	GENERAL STRUCTURAL NOTES	8/19/19
		S0.03	GENERAL NOTES	8/19/19
		S1.01	LOWER LEVEL COMPOSITE LATERAL PLAN	8/19/19
		S1.02	LEVEL 1 COMPOSITE LATERAL PLAN	8/19/19
		S1.03	LEVEL 2 COMPOSITE LATERAL PLAN	8/19/19
		S1.04	ROOF COMPOSITE LATERAL PLAN	8/19/19
		S2.01	LOWER LEVEL FOUNDATION PLAN - BLDG A	8/19/19
		S2.02	LOWER LEVEL FOUNDATION PLAN - BLDG B	8/19/19
		S2.03	LOWER LEVEL FOUNDATION PLAN - BLDG E	8/19/19
		S2.04	LOWER LEVEL FOUNDATION PLAN - BLDG G (AUX. GYM)	8/19/19
		S2.05	LOWER LEVEL FOUNDATION PLAN - BLDG G (MAIN GYM)	8/19/19
		S2.06	LEVEL 1 FRAMING PLAN - BLDG A	8/19/19
		S2.07	LEVEL 1 FRAMING PLAN - BLDG B	8/19/19
		S2.08	LEVEL 1 FOUNDATION PLAN - BLDG C	8/19/19
		S2.09	LEVEL 1 FOUNDATION PLAN - BLDG D	8/19/19
		S2.10	LEVEL 1 FRAMING PLAN - BLDG E	8/19/19
		S2.11	LEVEL 1 FOUNDATION PLAN - BLDG F	8/19/19
		S2.12	LEVEL 1 FRAMING PLAN - BLDG G (AUX GYM)	8/19/19
		S2.13	LEVEL 1 FRAMING PLAN - BLDG G (MAIN GYM)	8/19/19
		S2.14	LEVEL 1 FOUNDATION PLAN - BLDG H	8/19/19
		S2.15	LEVEL 1 FOUNDATION PLAN - BLDG H/I	8/19/19

Benson Highschool 100% SD Drawing List

EXHIBIT #3: DOCUMENT LIST

September 6th, 2019

The following document list is included as a further clarification regarding the Contract Documents that are incorporated into this Agreement.

Discipline	Type	Number	Title	Revision Date
		S2.16	LEVEL 2 FRAMING PLAN - BLDG A	8/19/19
		S2.17	LEVEL 2 FRAMING PLAN - BLDG B	8/19/19
		S2.18	LEVEL 2 FRAMING PLAN - BLDG C	8/19/19
		S2.19	LEVEL 2 FRAMING PLAN - BLDG D	8/19/19
		S2.20	LEVEL 2 FRAMING PLAN - BLDG E	8/19/19
		S2.21	LEVEL 2 FRAMING PLAN - BLDG F	8/19/19
		S2.22	LEVEL 2 FRAMING PLAN - BLDG G (AUX GYM)	8/19/19
		S2.23	LEVEL 2 FRAMING PLAN - BLDG G (MAIN GYM)	8/19/19
		S2.24	LEVEL 2 FRAMING PLAN - BLDG H	8/19/19
		S2.25	LEVEL 2 FRAMING PLAN - BLDG H/I	8/19/19
		S2.26	ROOF FRAMING PLAN - BLDG A	8/19/19
		S2.27	ROOF FRAMING PLAN - BLDG B	8/19/19
		S2.28	ROOF FRAMING PLAN - BLDG C	8/19/19
		S2.29	ROOF FRAMING PLAN - BLDG D	8/19/19
		S2.30	ROOF FRAMING PLAN - BLDG E	8/19/19
		S2.31	ROOF FRAMING PLAN - BLDG F	8/19/19
		S2.32	ROOF FRAMING PLAN - BLDG G (AUX GYM)	8/19/19
		S2.33	ROOF FRAMING PLAN - BLDG G (MAIN GYM)	8/19/19
		S2.34	ROOF FRAMING PLAN - BLDG H	8/19/19
		S2.35	ROOF FRAMING PLAN - BLDG H/I	8/19/19
		S2.43	PENTHOUSE ROOF FRAMING BLDG C	8/19/19
		S2.44	PENTHOUSE ROOF FRAMING BLDG C/D	8/19/19
		S2.49	PENTHOUSE ROOF FRAMING BLDG H	8/19/19
		S2.50	PENTHOUSE ROOF FRAMING BLDG H/I	8/19/19
		S3.01	ELEVATIONS - BLDG B	8/19/19
		S3.02	ELEVATIONS - BLDG C	8/19/19
		S3.03	ELEVATIONS - BLDG D	8/19/19
		S3.04	ELEVATIONS - BLDG H/I	8/19/19
		S3.05	ELEVATIONS - BLDG G	8/19/19
		S4.01	BUILDING SECTIONS	8/19/19
MECHANICAL				
		MH1.01	LOWER LEVELS COMPOSITE FLOOR PLAN - MECHANICAL	8/19/19
		MH1.02	LEVEL 1 COMPOSITE FLOOR PLAN - MECHANICAL	8/19/19
		MH1.03	LEVEL 2 COMPOSITE FLOOR PLAN - MECHANICAL	8/19/19
		MH1.04	COMPOSITE ROOF PLAN - MECHANICAL	8/19/19
		MZ1.01	LOWER LEVELS COMPOSITE FLOOR PLAN ZONING - MECHANICAL	8/19/19
		MZ1.02	LEVEL 01 COMPOSITE FLOOR PLAN ZONING - MECHANICAL	8/19/19
		MZ1.03	LEVEL 02 COMPOSITE FLOOR PLAN ZONING - MECHANICAL	8/19/19
		M5.01	DETAILS - MECHANICAL	8/19/19
		M6.01	DIAGRAMS - MECHANICAL	8/19/19
PLUMBING				
		P1.01	LOWER LEVELS COMPOSITE FLOOR PLAN - PLUMBING	8/19/19
		P1.02	LEVEL 1 COMPOSITE FLOOR PLAN - PLUMBING	8/19/19

Benson Highschool 100% SD Drawing List

EXHIBIT #3: DOCUMENT LIST

September 6th, 2019

The following document list is included as a further clarification regarding the Contract Documents that are incorporated into this Agreement.

Discipline	Type	Number	Title	Revision Date
		P1.03	LEVEL 2 COMPOSITE FLOOR PLAN - PLUMBING	8/19/19
ELECTRICAL				
		E0.00	ABBREVIATION AND SYMBOL LEGEND - GENERAL	8/19/19
		E6.00	ONE-LINE DIAGRAM SECTOR F-MAIN DISTRIBUTION	8/19/19
		E6.01	ONE-LINE DIAGRAM SECTOR B- 480Y/277V	8/19/19
		E6.02	ONE-LINE DIAGRAM SECTOR B- 208Y/120V	8/19/19
		E6.03	ONE-LINE DIAGRAM SECTOR C- 480Y/277V	8/19/19
		E6.04	ONE-LINE DIAGRAM SECTOR C- 208Y/120V	8/19/19
		E6.05	ONE-LINE DIAGRAM SECTOR G1 SUB DISTRIBUTION	8/19/19
		E6.06	ONE-LINE DIAGRAM SECTOR H- 480Y/277V	8/19/19
		E6.07	ONE-LINE DIAGRAM SECTOR H- 208Y/120V	8/19/19
		EP1.01	SITE PLAN - POWER	8/19/19
		EP2.01	LOWER LEVEL PLAN -BLDG A -POWER	8/19/19
		EP2.02	LOWER LEVEL PLAN -BLDG B -POWER	8/19/19
		EP2.03	LOWER LEVEL PLAN -BLDG E -POWER	8/19/19
		EP2.04	LOWER LEVEL PLAN -BLDG G1 (AUX GYM) -POWER	8/19/19
		EP2.05	LOWER LEVEL PLAN -BLDG G2 (MAIN GYM) -POWER	8/19/19
		EP2.06	LEVEL1 PLAN - BLDG A - POWER	8/19/19
		EP2.07	LEVEL 1 PLAN - BLDG B - POWER	8/19/19
		EP2.08	LEVEL 1 PLAN - BLDG C - POWER	8/19/19
		EP2.09	LEVEL 1 PLAN -BLDG D -POWER	8/19/19
		EP2.10	LEVEL 1 PLAN -BLDG E -POWER	8/19/19
		EP2.11	LEVEL 1 PLAN - BLDG F - POWER	8/19/19
		EP2.12	LEVEL1 PLAN - BLDG G1 (AUX GYM) - POWER	8/19/19
		EP2.13	LEVEL 1 PLAN -BLDG G2 (MAIN GYM) -POWER	8/19/19
		EP2.14	LEVEL 1 PLAN -BLDG H -POWER	8/19/19
		EP2.15	LEVEL 1 PLAN -BLDG I -POWER	8/19/19
		EP2.16	LEVEL 2 PLAN -BLDG A -POWER	8/19/19
		EP2.17	LEVEL 2 PLAN -BLDG B -POWER	8/19/19
		EP2.18	LEVEL 2 PLAN -BLDG C -POWER	8/19/19
		EP2.19	LEVEL 2 PLAN -BLDG D -POWER	8/19/19
		EP2.20	LEVEL 2 PLAN - BLDG E - POWER	8/19/19
		EP2.21	LEVEL 2 PLAN - BLDG F - POWER	8/19/19
		EP2.22	LEVEL 2 PLAN -BLDG G1 (AUX GYM) -POWER	8/19/19
		EP2.23	LEVEL 2 PLAN - BLDG G2 (MAIN GYM) - POWER	8/19/19
		EP2.24	LEVEL 2 PLAN - BLDG H - POWER	8/19/19
		EP2.25	LEVEL 2 PLAN - BLDG I - POWER	8/19/19
		EP4.01	ENLARGED ELECTRICAL ROOM PLANS - POWER	8/19/19
		EP4.02	ENLARGED ELECTRICAL ROOM PLANS - POWER	8/19/19
LIGHTING				
		EL1.01	LOWER LEVEL LIGHTING PLAN	8/19/19
		EL1.11	LEVEL 1 LIGHTING PLAN	8/19/19
		EL1.14	LEVEL 1 LIGHTING - BLDG C	8/19/19

Benson Highschool 100% SD Drawing List

EXHIBIT #3: DOCUMENT LIST

September 6th, 2019

The following document list is included as a further clarification regarding the Contract Documents that are incorporated into this Agreement.

Discipline	Type	Number	Title	Revision Date
		EL1.18	LEVEL 1 LIGHTING - BLDG H	8/19/19
		EL1.18A	LEVEL 1 LIGHTING - BLDG H MEZZANINE	8/19/19
		EL1.21	LEVEL 2 LIGHTING PLAN	8/19/19
		EL1.26	LEVEL 2 LIGHTING - BLDG E/F	8/19/19
		EL210	LIGHTING SYSTEMS	8/19/19
		EL211	LIGHTING SYSTEMS	8/19/19
TELECOM				
		ET2.08	LEVEL 1 PLAN -BLDG C -TELECOM	8/19/19
		ET2.14	LEVEL 1 PLAN - BLDG H - TELECOM	8/19/19
		ET2.18	LEVEL 2 PLAN -BLDG C -TELECOM	8/19/19
		ET2.24	LEVEL 2 PLAN - BLDG H - TELECOM	8/19/19
THEATER				
		TH1.0	THEATER SEATING	8/19/19
		TH2.0	THEATER LIGHTING	8/19/19
		TH3.0	THEATER STAGE	8/19/19
		TH4.0	CONTROL BOOTH AND MULTIPURPOSE	8/19/19
FOOD SERVICE				
		FS1.0	LEVEL 1 KITCHEN & SERVERY PLAN	8/19/19

PROJECT SCHEDULE

THIS RFP

2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025

M J J A S O N D J F M A M J J A S O N D J F M A M J J A S O N D J F M A M J J A S O N D J F M A M J J A S O N D J F M A M J J A S O N D J F M A M J J A S O N D J F

SUMMER #1 | SUMMER #2 | SUMMER #3 | SUMMER #4 | SUMMER #5 | SUMMER #6

BENSON

SD
EST.
100% SD 8/19/19
DD
50% DD 12/9/19
100% DD 4/6/20
EST. VE
CD
50% CD 11/23/20
GMP 4/5/21
100% CD 5/10/21
EST. VE
EST. VE GMP
PERMIT
B/B
START 6/10/21
BID/B-OUT
CONSTRUCTION
TCO 4/10/24
MOVE COMPLETE 7/31/24
SITE
SITE
OWNER MOVE OUT
6/10/21 - 9/1/21

MARSHALL

SD
EST.
DD
90% DD 10/28/19
EST.
VE
PH1
PERMIT
START 6/9/20 - FINISH 8/17/20
OWNER MOVE COMPLETE 8/31/20
B/B
PH1
START 6/9/20 - FINISH 8/17/20
OWNER MOVE COMPLETE 8/31/20
PHASE 2 - CTE BUILDING
PERMIT
B/B PH2
START 11/17/20 - FINISH 6/28/21
OWNER MOVE COMPLETE 7/26/21
PHASE 3 - REMAINING
PERMIT
LAG
B/B PH3
START 1/12/21 - FINISH 7/26/21
OWNER MOVE COMPLETE 8/23/21

KENTON

PH1 - ROOF
PERMIT
B/B CONSTRUCTION
START 1/12/21 - FINISH 7/26/21
OWNER MOVE COMPLETE 8/23/21
PH2 - INTERIORS
PERMIT
B/B
START 6/9/21 - FINISH 8/17/21
OWNER MOVE COMPLETE 8/31/21

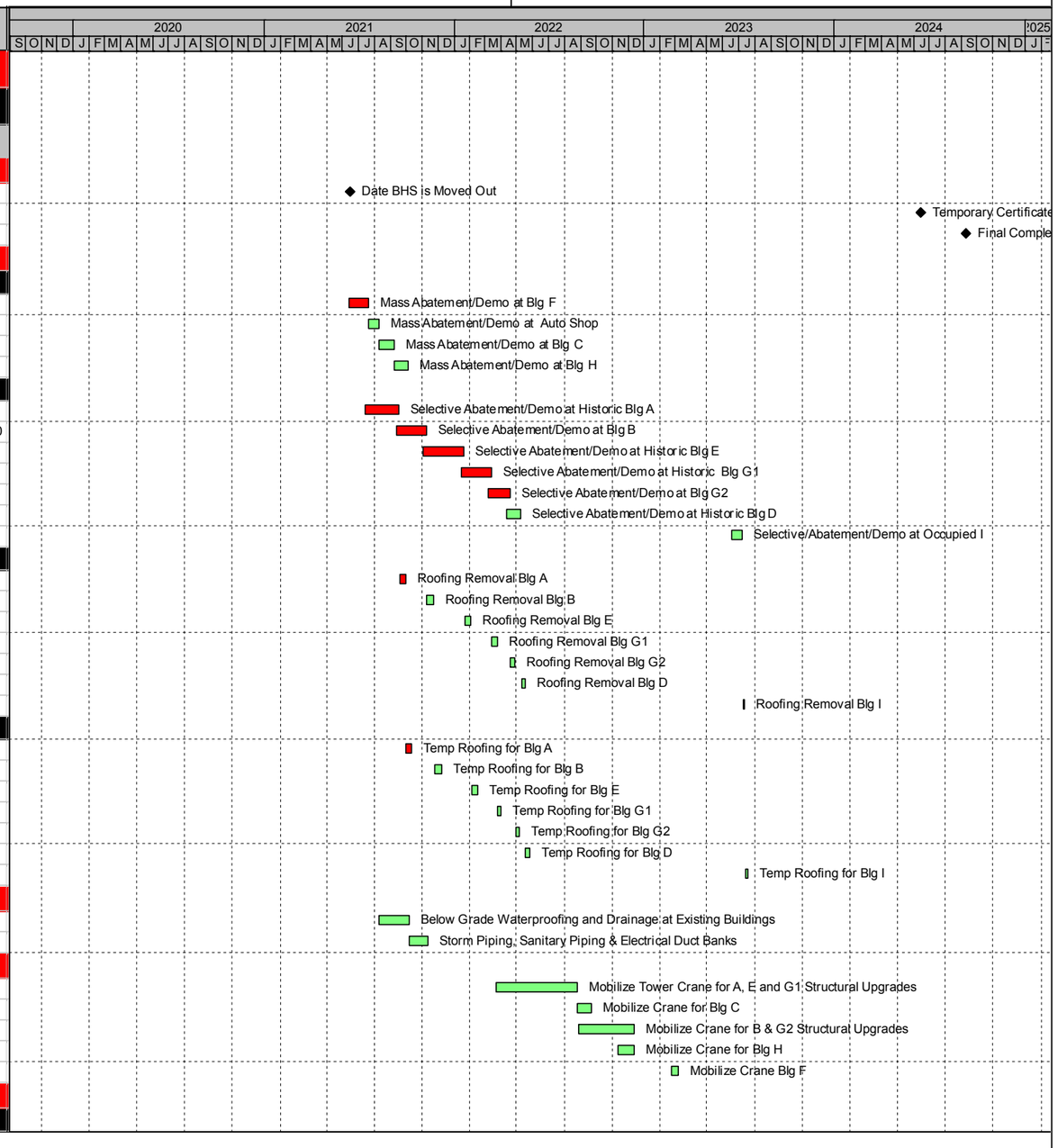
MPG

SD
DD
CD
PERMIT
B/B
CONSTRUCTION

PORTLAND PUBLIC SCHOOLS
bassetti architects
ANDERSEN CONSTRUCTION

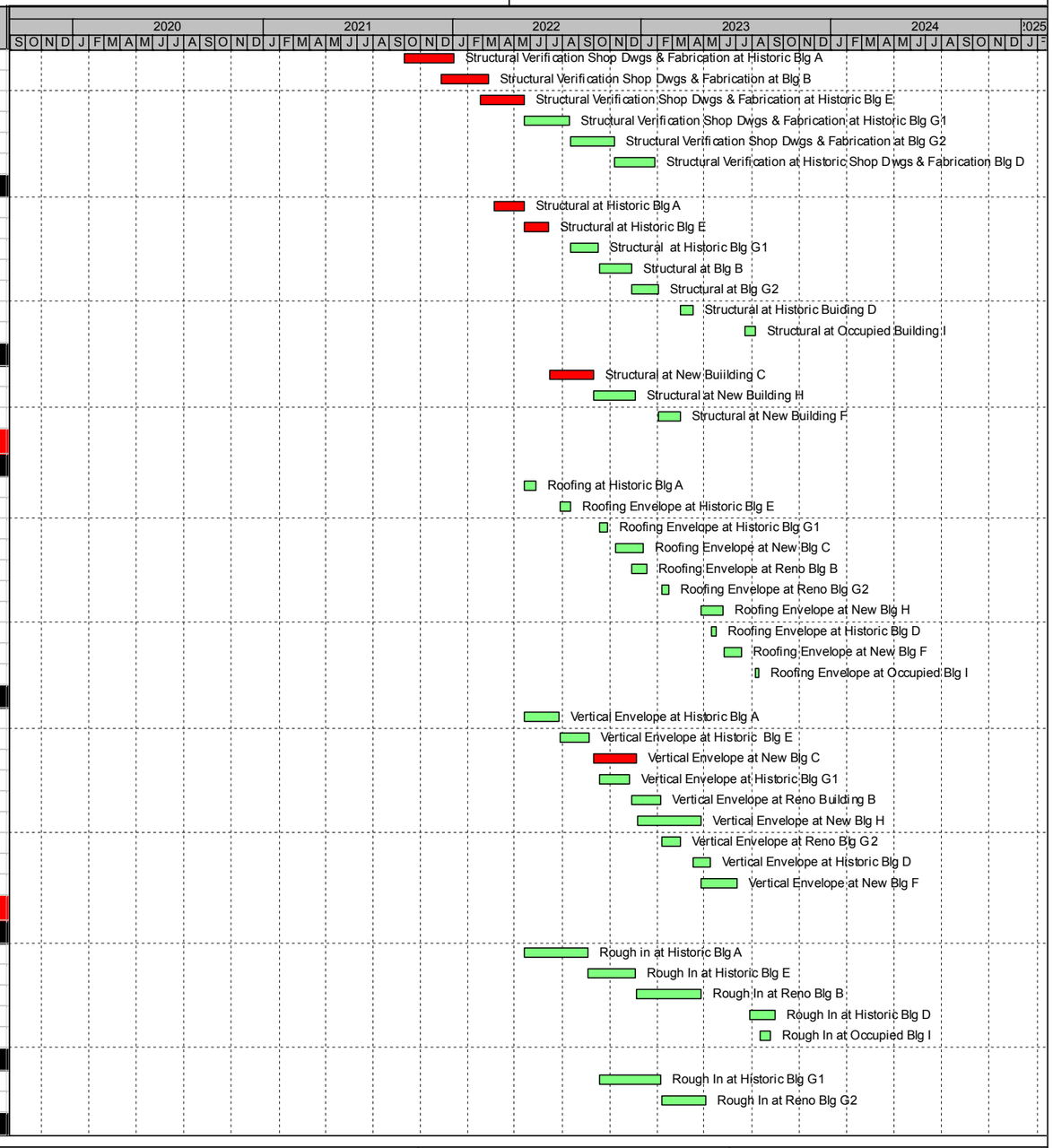
UPDATED AUGUST 2019

Activity ID	Activity Name	Orig Dur	Start	Finish	Predecessors
BHS- DD2019.08.05 100% SD SCHEDULE TO		812	14-Jun-21	10-Sep-24	
PROJECT CONSTRUCTION		812	14-Jun-21	10-Sep-24	
BHS CONSTRUCTION at 100% SD		812	14-Jun-21	10-Sep-24	
BHS MILESTONES		811	14-Jun-21	10-Sep-24	
BHS-MILE-1000	Date BHS is Moved Out	0		14-Jun-21	BHS- CD-1030, BHS-F&D-1000, BHS- PEF
BHS-MILE-1010	Temporary Certificate of Occupancy/Substantial Completion	0		14-Jun-24	BHS-FOCC-1010
BHS-MILE-1020	Final Completion	0		10-Sep-24	BHS-FOCC-1020
BHS ABATEMENT & DEMOLITON		524	14-Jun-21	18-Jul-23	
BHS MASS ABATEMENT & DEMO		80	14-Jun-21	05-Oct-21	
BHS-DEMO-F-1020	Mass Abatement/Demo at Blg F	26	14-Jun-21	20-Jul-21	BHS-MILE-1000
BHS-DEMO-Auto-1030	Mass Abatement/Demo at Auto Shop	14	21-Jul-21	09-Aug-21	BHS-DEMO-F-1020
BHS-DEMO-C-1040	Mass Abatement/Demo at Blg C	20	10-Aug-21	07-Sep-21	BHS-DEMO-Auto-1030
BHS-DEMO-H-1010	Mass Abatement/Demo at Blg H	20	08-Sep-21	05-Oct-21	BHS-DEMO-C-1040
BHS SELECTIVE ABATEMENT & DEMO		496	14-Jul-21	07-Jul-23	
BHS-DEMO-A-1040	Selective Abatement/Demo at Historic Blg A	47	14-Jul-21	17-Sep-21	BHS-DEMO-F-1020, BHS-MILE-1000
BHS-DEMO-B-1050	Selective Abatement/Demo at Blg B	41	13-Sep-21	08-Nov-21	BHS-DEMO-Auto-1030, BHS-DEMO-A-1040
BHS-DEMO-E-1060	Selective Abatement/Demo at Historic Blg E	50	02-Nov-21	20-Jan-22	BHS-DEMO-B-1050
BHS-DEMO-G1-1070	Selective Abatement/Demo at Historic Blg G1	42	14-Jan-22	14-Mar-22	BHS-DEMO-E-1060
BHS-DEMO-G2-1080	Selective Abatement/Demo at Blg G2	30	08-Mar-22	18-Apr-22	BHS-DEMO-G1-1070
BHS-DEMO-D-1020	Selective Abatement/Demo at Historic Blg D	20	12-Apr-22	09-May-22	BHS-DEMO-G2-1080
BHS-DEMO-I-1030	Selective/Abatement/Demo at Occupied I	14	19-Jun-23	07-Jul-23	BHS-DEMO-D-1020
BHS ROOF ABATEMENT & DEMO		453	20-Sep-21	13-Jul-23	
BHS-RFDMO-A-1000	Roofing Removal Blg A	8	20-Sep-21	29-Sep-21	BHS-DEMO-A-1040
BHS-RFDMO-B-1010	Roofing Removal Blg B	11	09-Nov-21	23-Nov-21	BHS-DEMO-B-1050
BHS-RFDMO-E-1020	Roofing Removal Blg E	9	21-Jan-22	02-Feb-22	BHS-DEMO-E-1060
BHS-RFDMO-G1-1030	Roofing Removal Blg G1	8	15-Mar-22	24-Mar-22	BHS-DEMO-G1-1070
BHS-RFDMO-G2-1040	Roofing Removal Blg G2	8	19-Apr-22	28-Apr-22	BHS-DEMO-G2-1080
BHS-RFDMO-D-1050	Roofing Removal Blg D	6	10-May-22	17-May-22	BHS-DEMO-D-1020
BHS-RFDMO-I-1060	Roofing Removal Blg I	4	10-Jul-23	13-Jul-23	BHS-DEMO-I-1030
BHS TEMPORARY ROOFING FOR DRY IN		448	30-Sep-21	18-Jul-23	
BHS-TMPRF-A-1000	Temp Roofing for Blg A	8	30-Sep-21	11-Oct-21	BHS-RFDMO-A-1000
BHS-TMPRF-B-1010	Temp Roofing for Blg B	8	24-Nov-21	07-Dec-21	BHS-RFDMO-B-1010
BHS-TMPRF-E-1020	Temp Roofing for Blg E	8	03-Feb-22	14-Feb-22	BHS-RFDMO-E-1020
BHS-TMPRF-G1-1030	Temp Roofing for Blg G1	6	25-Mar-22	01-Apr-22	BHS-RFDMO-G1-1030
BHS-TMPRF-G2-1040	Temp Roofing for Blg G2	6	29-Apr-22	06-May-22	BHS-RFDMO-G2-1040
BHS-TMPRF-D-1050	Temp Roofing for Blg D	5	18-May-22	25-May-22	BHS-RFDMO-D-1050
BHS-TMPRF-I-1060	Temp Roofing for Blg I	3	14-Jul-23	18-Jul-23	BHS-RFDMO-I-1060
BHS SITE UTILITES & BELOW GRADE WORK		65	11-Aug-21	10-Nov-21	
BHS-UTIL-1010	Below Grade Waterproofing and Drainage at Existing Buildings	40	11-Aug-21	06-Oct-21	BHS-DEMO-A-1040
BHS-UTIL-1000	Storm Piping, Sanitary Piping & Electrical Duct Banks	25	07-Oct-21	10-Nov-21	BHS-DEMO-H-1010, BHS-UTIL-1010
BHS CRANES		241	22-Mar-22	08-Mar-23	
BHS-CRAN-A-E-G1-1000	Mobilize Tower Crane for A, E and G1 Structural Upgrades	112	22-Mar-22	26-Aug-22	BHS-STRUC-A-1050
BHS-CRAN-C-1010	Mobilize Crane for Blg C	20	25-Aug-22	22-Sep-22	BHS-STRUC-C-1010
BHS-CRAN-B-G2-1030	Mobilize Crane for B & G2 Structural Upgrades	74	29-Aug-22	13-Dec-22	BHS-CRAN-A-E-G1-1000
BHS-CRAN-H-1020	Mobilize Crane for Blg H	20	11-Nov-22	12-Dec-22	BHS-STRUC-H-1020
BHS-CRAN-F-1040	Mobilize Crane Blg F	10	23-Feb-23	08-Mar-23	BHS-STRUC-F-1050
BHS STRUCTURAL		462	30-Sep-21	07-Aug-23	
BHS STRUCTURAL VERIFICATION & FABRICATION		328	30-Sep-21	27-Jan-23	


2020
2021
2022
2023
2024
2025
S O N D J F M A M J J A S O N D J F M A M J J A S O N D J F M A M J J A

BHS- DD2019.08.05 100% SD SCHEDULE TO PPS | **ANDERSEN CONSTRUCTION** | ACCO - BA Classic

Activity ID	Activity Name	Orig Dur	Start	Finish	Predecessors
BHS-VERIFY-A-1000	Structural Verification Shop Dwgs & Fabrication at Historic Blg A	60	30-Sep-21	03-Jan-22	BHS-TMPRF-A-1000
BHS-VERIFY-B-1010	Structural Verification Shop Dwgs & Fabrication at Blg B	60	10-Dec-21	11-Mar-22	BHS-TMPRF-B-1010, BHS-VERIFY-A-1000
BHS-VERIFY-E-1020	Structural Verification Shop Dwgs & Fabrication at Historic Blg E	60	25-Feb-22	19-May-22	BHS-TMPRF-E-1020, BHS-VERIFY-B-1010
BHS-VERIFY-G1-1030	Structural Verification Shop Dwgs & Fabrication at Historic Blg (	60	20-May-22	15-Aug-22	BHS-TMPRF-G1-1030, BHS-VERIFY-E-10:
BHS-VERIFY-G2-1040	Structural Verification Shop Dwgs & Fabrication at Blg G2	60	16-Aug-22	08-Nov-22	BHS-TMPRF-G2-1040, BHS-VERIFY-G1-1
BHS-VERIFY-D-1050	Structural Verification at Historic Shop Dwgs & Fabrication Blg D	50	09-Nov-22	27-Jan-23	BHS-TMPRF-D-1050, BHS-VERIFY-G2-10
BHS STRUCTURAL RENOVATION		347	22-Mar-22	07-Aug-23	
BHS-STRUC-A-1050	Structural at Historic Blg A	43	22-Mar-22	19-May-22	BHS-UTIL-1000, BHS-DEMO-G2-1080, BH
BHS-STRUC-E-1040	Structural at Historic Blg E	32	20-May-22	06-Jul-22	BHS-VERIFY-E-1020, BHS-DEMO-E-1060,
BHS-STRUC-G1-1030	Structural at Historic Blg G1	39	16-Aug-22	10-Oct-22	BHS-VERIFY-G1-1030, BHS-DEMO-G1-1(
BHS-STRUC-B-1020	Structural at Blg B	43	11-Oct-22	12-Dec-22	BHS-VERIFY-B-1010, BHS-DEMO-B-1050,
BHS-STRUC-G2-1010	Structural at Blg G2	31	13-Dec-22	01-Feb-23	BHS-VERIFY-G2-1040, BHS-CRAN-B-G2-
BHS-STRUC-D-1030	Structural at Historic Buiding D	18	16-Mar-23	10-Apr-23	BHS-VERIFY-D-1050, BHS-STRUC-F-105(
BHS-STRUC-I-1040	Structural at Occupied Building I	14	19-Jul-23	07-Aug-23	BHS-TMPRF-I-1060, BHS-DEMO-I-1030, E
BHS STRUCTURAL NEW		171	07-Jul-22	15-Mar-23	
BHS-STRUC-C-1010	Structural at New Buiilding C	60	07-Jul-22	29-Sep-22	BHS-STRUC-E-1040, BHS-DEMO-C-1040
BHS-STRUC-H-1020	Structural at New Building H	56	30-Sep-22	20-Dec-22	BHS-DEMO-H-1010, BHS-STRUC-C-1010
BHS-STRUC-F-1050	Structural at New Building F	30	02-Feb-23	15-Mar-23	BHS-STRUC-H-1020, BHS-DEMO-F-1020.
BHS EXTERIOR ENVELOPE		310	20-May-22	15-Aug-23	
BHS EXTERIOR ENVELOPE ROOFING		310	20-May-22	15-Aug-23	
BHS-XEN-A-1100	Roofing at Historic Blg A	15	20-May-22	10-Jun-22	BHS-XEN-A-1010
BHS-XEN-E-1110	Roofing Envelope at Historic Blg E	15	27-Jul-22	16-Aug-22	BHS-XEN-E-1020
BHS-XEN-G1-1120	Roofing Envelope at Historic Blg G1	12	11-Oct-22	26-Oct-22	BHS-XEN-G1-1030
BHS-XEN-C-1170	Roofing Envelope at New Blg C	30	11-Nov-22	03-Jan-23	BHS-XEN-C-1070
BHS-XEN-B-1140	Roofing Envelope at Reno Blg B	16	13-Dec-22	11-Jan-23	BHS-XEN-B-1050
BHS-XEN-G2-1150	Roofing Envelope at Reno Blg G2	11	08-Feb-23	22-Feb-23	BHS-XEN-B-1140, BHS-XEN-G2-1040
BHS-XEN-H-1180	Roofing Envelope at New Blg H	30	26-Apr-23	07-Jun-23	BHS-XEN-H-1080
BHS-XEN-D-1130	Roofing Envelope at Historic Blg D	9	15-May-23	25-May-23	BHS-XEN-C-1170, BHS-XEN-D-1060
BHS-XEN-F-1190	Roofing Envelope at New Blg F	23	08-Jun-23	11-Jul-23	BHS-XEN-F-1090
BHS-XEN-I-1160	Roofing Envelope at Occupied Blg I	6	08-Aug-23	15-Aug-23	BHS-STRUC-I-1040, BHS-XEN-D-1130
BHS EXTERIOR ENVELOPE VERTICAL ELEMENTS		280	20-May-22	03-Jul-23	
BHS-XEN-A-1010	Vertical Envelope at Historic Blg A	46	20-May-22	26-Jul-22	BHS-STRUC-A-1050
BHS-XEN-E-1020	Vertical Envelope at Historic Blg E	40	27-Jul-22	21-Sep-22	BHS-STRUC-E-1040, BHS-XEN-A-1010
BHS-XEN-C-1070	Vertical Envelope at New Blg C	58	30-Sep-22	22-Dec-22	BHS-STRUC-C-1010
BHS-XEN-G1-1030	Vertical Envelope at Historic Blg G1	40	11-Oct-22	07-Dec-22	BHS-STRUC-G1-1030, BHS-XEN-E-1020
BHS-XEN-B-1050	Vertical Envelope at Reno Building B	35	13-Dec-22	07-Feb-23	BHS-STRUC-B-1020, BHS-XEN-G1-1030
BHS-XEN-H-1080	Vertical Envelope at New Blg H	82	23-Dec-22	25-Apr-23	BHS-XEN-C-1070, BHS-STRUC-H-1020
BHS-XEN-G2-1040	Vertical Envelope at Reno Blg G2	27	08-Feb-23	16-Mar-23	BHS-STRUC-G2-1010, BHS-XEN-B-1050
BHS-XEN-D-1060	Vertical Envelope at Historic Blg D	24	11-Apr-23	12-May-23	BHS-XEN-C-1070, BHS-STRUC-D-1030
BHS-XEN-F-1090	Vertical Envelope at New Blg F	48	26-Apr-23	03-Jul-23	BHS-XEN-H-1080, BHS-STRUC-F-1050
BHS ROUGH IN		332	20-May-22	15-Sep-23	
BHS ROUGH IN RENOVATION		332	20-May-22	15-Sep-23	
BHS-RI-A-1010	Rough in at Historic Blg A	84	20-May-22	19-Sep-22	BHS-XEN-A-1010
BHS-RI-E-1020	Rough In at Historic Blg E	64	20-Sep-22	20-Dec-22	BHS-RI-A-1010, BHS-XEN-E-1020
BHS-RI-B-1040	Rough In at Reno Blg B	85	21-Dec-22	26-Apr-23	BHS-RI-E-1020, BHS-XEN-B-1050
BHS-RI-D-1060	Rough In at Historic Blg D	35	28-Jul-23	15-Sep-23	BHS-RI-F-1100, BHS-RI-B-1040, BHS-RI-C
BHS-RI-I-1070	Rough In at Occupied Blg I	14	16-Aug-23	05-Sep-23	BHS-XEN-I-1160, BHS-RI-H-1090, BHS-ST
BHS ROUGH IN GYMNASIUMS		140	11-Oct-22	04-May-23	
BHS-RI-G11030	Rough In at Historic Blg G1	78	11-Oct-22	07-Feb-23	BHS-XEN-G1-1030
BHS-RI-G2-1050	Rough In at Reno Blg G2	62	08-Feb-23	04-May-23	BHS-RI-G11030, BHS-XEN-G2-1040
BHS ROUGH IN NEW BUILDINGS		218	30-Sep-22	15-Aug-23	

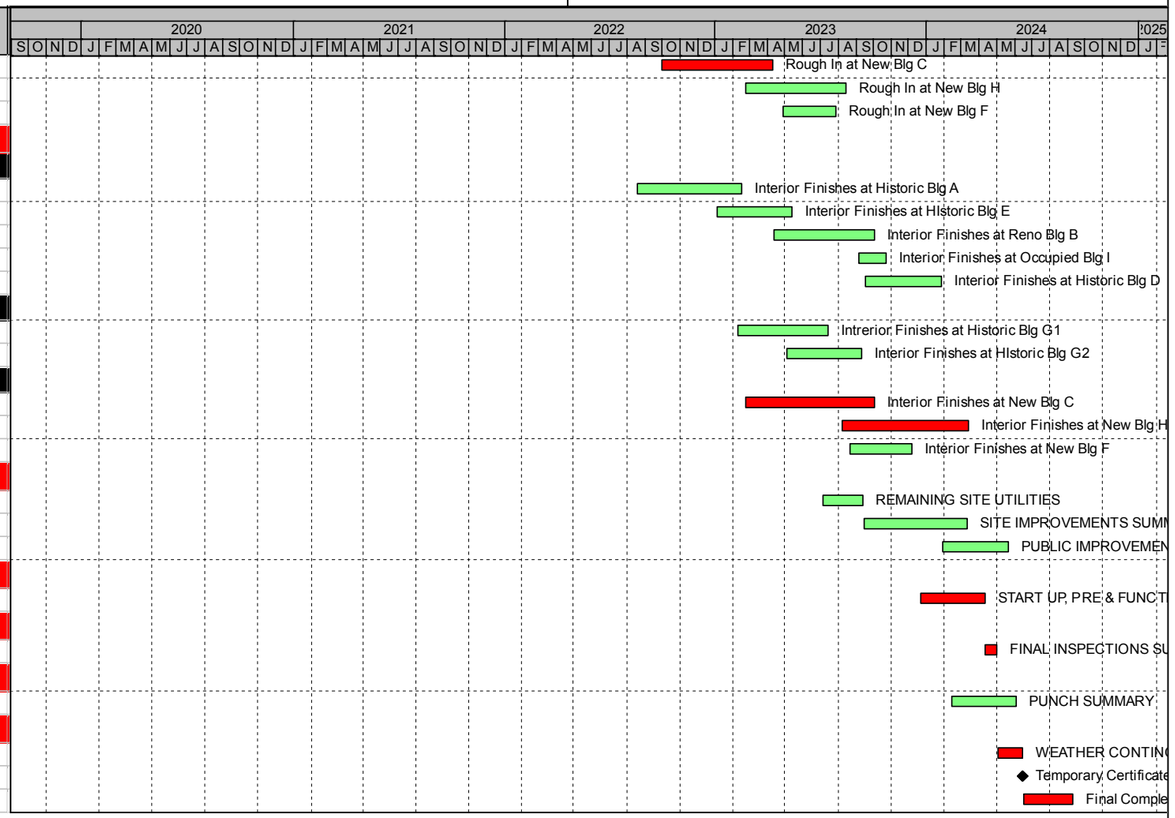


Remaining Level of Effort | Remaining Work
Actual Level of Effort | Critical Remaining Work
Actual Work | Milestone

BHS- DD2019.08.05 100% SD SCHEDULE TO PPS
Andersen Construction
Page 2 of 3

Printed On: 07-Aug-19 (09:43)
Data Date: 05-Aug-19
Project Finish: 10-Sep-24
Printed By: banthony

Activity ID	Activity Name	Orig Dur	Start	Finish	Predecessors
BHS-RI-C-1080	Rough In at New Blg C	129	30-Sep-22	10-Apr-23	BHS-XEN-C-1070
BHS-RI-H-1090	Rough In at New Blg H	122	23-Feb-23	15-Aug-23	BHS-RI-C-1080, BHS-XEN-H-1080
BHS-RI-F-1100	Rough In at New Blg F	64	27-Apr-23	27-Jul-23	BHS-RI-B-1040, BHS-XEN-F-1090
BHS INTERIOR FINISHES		390	19-Aug-22	14-Mar-24	
BHS INTERIOR FINISHES RENOVATION		356	19-Aug-22	26-Jan-24	
BHS-FIN-A-1010	Interior Finishes at Historic Blg A	120	19-Aug-22	15-Feb-23	BHS-XEN-A-1100, BHS-RI-A-1010
BHS-FIN-E-1030	Interior Finishes at HIstoric Blg E	92	05-Jan-23	12-May-23	BHS-FIN-A-1010, BHS-XEN-E-1110, BHS-I
BHS-FIN-B-1020	Interior Finishes at Reno Blg B	122	12-Apr-23	03-Oct-23	BHS-FIN-E-1030, BHS-XEN-B-1140, BHS-I
BHS-FIN-I-1060	Interior Finishes at Occupied Blg I	34	06-Sep-23	23-Oct-23	BHS-XEN-I-1160, BHS-RI-I-1070
BHS-FIN-D-1070	Interior Finishes at Historic Blg D	87	18-Sep-23	26-Jan-24	BHS-XEN-D-1130, BHS-RI-D-1060
BHS INTERIOR FINISHES GYMNASIUMS		151	08-Feb-23	11-Sep-23	
BHS-FIN-G1-1040	Intrerior Finishes at Historic Blg G1	111	08-Feb-23	14-Jul-23	BHS-XEN-G1-1120, BHS-RI-G11030
BHS-FIN-G2-1050	Interior Finishes at HIstoric Blg G2	89	05-May-23	11-Sep-23	BHS-XEN-G2-1150, BHS-RI-G2-1050
BHS INTERIOR FINISHES NEW BUILDINGS		265	23-Feb-23	14-Mar-24	
BHS-FIN-C-1080	Interior Finishes at New Blg C	156	23-Feb-23	03-Oct-23	BHS-XEN-C-1170, BHS-RI-C-1080
BHS-FIN-H-1090	Interior Finishes at New Blg H	148	09-Aug-23	14-Mar-24	BHS-FIN-C-1080, BHS-XEN-H-1180, BHS-
BHS-FIN-F-1100	Interior Finishes at New Blg F	76	21-Aug-23	07-Dec-23	BHS-FIN-B-1020, BHS-XEN-F-1190, BHS-I
BHS SITE IMPROVEMENTS		220	05-Jul-23	20-May-24	
BHS-SITE-1020	REMAINING SITE UTILITIES	50	05-Jul-23	13-Sep-23	BHS-XEN-F-1090, BHS-UTIL-1000
BHS-SITE-1000	SITE IMPROVEMENTS SUMMARY	120	14-Sep-23	11-Mar-24	BHS-SITE-1020, BHS-XEN-F-1190
BHS-SITE-1010	PUBLIC IMPROVEMENTS SUMMARY	80	30-Jan-24	20-May-24	BHS-SITE-1000
BHS COMMISSIONING		75	21-Dec-23	11-Apr-24	
BHS-CX-1000	START UP, PRE & FUNCTIONAL TESTING SUMMARY	75	21-Dec-23	11-Apr-24	BHS-FIN-G2-1050, BHS-FIN-H-1090, BHS
BHS FINAL INSPECTIONS		15	12-Apr-24	02-May-24	
BHS-FINALS-1000	FINAL INSPECTIONS SUMMARY	15	12-Apr-24	02-May-24	BHS-CX-1000
BHS PUNCH		80	13-Feb-24	04-Jun-24	
BHS-PUNCH-1000	PUNCH SUMMARY	80	13-Feb-24	04-Jun-24	BHS-CX-1000, BHS-SITE-1010
BHS OCCUPANCY & MOVE IN		90	03-May-24	10-Sep-24	
BHS-FOCC-1000	WEATHER CONTINGENCY	30	03-May-24	14-Jun-24	BHS-FINALS-1000
BHS-FOCC-1010	Temporary Certificate of Occupancy/Substantial Completion	0		14-Jun-24*	BHS-FOCC-1000
BHS-FOCC-1020	Final Completion	60	17-Jun-24	10-Sep-24	BHS-PUNCH-1000, BHS-FOCC-1010



Remaining Level of Effort
Actual Level of Effort
Actual Work
Remaining Work
Critical Remaining Work
Milestone

Printed On: 07-Aug-19 (09:43)
Data Date: 05-Aug-19
Project Finish: 10-Sep-24
Printed By: banthony

Andersen Construction is now using the COMPASS Subcontractor Risk Program for prequalification and financial statement reviews.

COMPASS is a secure, third party application powered by Bespoke Metrics. Please enter and upload your information into the COMPASS system for review.

To start your prequalification process please visit:
https://compass-srp.com/register/us

For support in the COMPASS system and status of your prequalification, please contact:

Courtney Quinn at Bespoke Metrics

cquinn@bespokemetrics.com

(647) 282-4969

Please note that your financials are kept in the strictest confidence. Only Finance staff and Risk Managers will be able to access your financial information. Your financial data is used for risk assessment only.

For questions about Andersen Construction's prequalification requirements and process, please contact:

Idaho Region – Ami Ostrow aostrow@andersen-const.com

Oregon Region – Elizabeth Juhala ejuhala@andersen-const.com

Washington Region – Michelle Bungay mbungay@andersen-const.com

ANDERSEN CONSTRUCTION COMPANY OF OREGON, LLC
6712 North Cutter Circle
Portland, OR 97217
Phone: (503) 283-6712
Fax: (503) 283-4393

SUBCONTRACT

SUBCONTRACTOR: Company Name Company Address Attention: Contact Name Phone: Contact Phone Email: Contact Email Address	**PROJECT:** Project Name Project Address **SCOPE OF WORK:** Scope of Work **COST CODE:** Cost Code	**DATE:** **PROJECT #:** **CONTRACT #:** **VENDOR #:**

This Agreement, made as of date by and between ANDERSEN CONSTRUCTION COMPANY OF OREGON, LLC, hereinafter called the "Contractor," and Company Name, hereinafter called the "Subcontractor," to perform part of the work on the Project referenced above.

SCOPE OF WORK: Contractor engages Subcontractor as an independent contractor to perform the work and furnish all the coordination, labor, materials, equipment and services including, but not limited to competent supervision, shop drawings, samples, tools, ladders, safety equipment, and scaffolding as are necessary for the proper performance of the Scope of Work described in the Contract Documents listed below (hereinafter called "Subcontractor's Work" or "Work"):

Exhibits	Date	**Exhibits**	Date
#1 – Scope Clarifications		A – Safety Handbook	2018
#2A – Terms & Conditions for Subcontracts	2019	B – Anti-Harassment Policy	2018
#3 – Document List		C – Safety Disciplinary Policy	2018
#4 – Project Schedule		D – Accounting Procedures	2019
#5 – Site Specific Work Regulations			
#6 – Site Logistics Plan			
#7 – Cost Definition for GMP Subcontracts			
#8 – Design Build Requirements			
#9 – BIM and VDC Requirements			
#10 – Minimum Insurance Requirements			

Subcontractor shall perform such Work under the general direction of Contractor and in accordance with this Agreement and all applicable provisions of the Prime Contract Documents including, but not limited to, the Agreement between Owner and Contractor ("Prime Contract"), Conditions of the Prime Contract (General, Supplementary and other Conditions), Drawings, Specifications, Addenda issued prior to execution of the Prime Contract, other documents listed in the Prime Contract Documents and Modifications issued after execution of the Agreement, the terms of which are incorporated herein by reference. This Agreement, and referenced Exhibits, and the Prime Contract Documents shall hereinafter be collectively referred to as the "Contract Documents."

INSURANCE: As prescribed by Exhibit 10, unless otherwise modified below: [Insert Additional / Increased Insurance Reqts]

BONDS: Performance and Payment Bonds SHALL NOT be required for the Project.

PRICE: Contractor agrees to pay Subcontractor for the satisfactory performance of Subcontractor's Work the sum of **«AMOUNT» DOLLARS AND NO/100s ($«Amount»)**, hereinafter called the "Contract Price" or "Price," subject to additions or deductions per Article 3. A reserve of 10% will be retained from each payment application.

PAY APPS: Submit payment applications to subpayables@andersen-const.com by the 20th of each month. If not otherwise specified, payment applications are due by the 20th of each month.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement by their proper officers or duly authorized agents effective the day and year first written above.

Subcontractor

By: _____ Date: _____
Signature

Name: _____

Oregon Contractor's Registration Number:
CCB

Andersen Construction Company of Oregon, LLC

By: _____ Date: _____
Signature

Name: _____

Contractor's Registration Numbers:
ID RCE-46335 | **OR** 218297 | **WA** ANDERCCS24WW

EXHIBIT 2A – TERMS & CONDITIONS FOR SUBCONTRACTS

ARTICLE 1 – PROJECT SCHEDULE

1.1 COMMENCE PERFORMANCE. Subcontractor shall commence its Work within three (3) days of notice to proceed from Contractor and if such Work is suspended pursuant to Section 10.2 of this Agreement, Subcontractor shall resume such Work within two working days from Contractor's notice to do so.

If Subcontractor commences performance of the Work before receiving a fully executed copy of this Agreement, then Subcontractor's commencement of such Work shall serve as its agreement to be bound by the terms and conditions of this Agreement, including all Exhibits and Prime Contract Documents incorporated herein by reference. Subcontractor agrees that any portion of Subcontractor's Work performed prior to the execution of the Agreement, including but not limited to incidental preparation activities, shall be governed by and be subject to the terms and conditions of this Agreement. This document shall govern the performance of the Work and obligations of Subcontractor and Contractor with respect thereto.

1.2 TIME IS OF THE ESSENCE. Time is of the essence. Subcontractor warrants and represents that it is fully familiar with the requirements and provisions of the Contract Documents concerning time of performance, and that the Price herein provided contemplates performance and completion of Subcontractor's Work within such time as may reasonably be necessary to permit Contractor to complete the Project within the time required. Contractor shall prepare the Project Schedule and revise such Project Schedule as necessary.

1.3 DUTY TO BE BOUND. Subcontractor shall be bound and perform in accordance with the Project Schedule which may be changed by Contractor from time to time for any reason. Subcontractor shall perform in accordance with such modified Project Schedule(s). No modification or alteration of the Project Schedule shall entitle Subcontractor to any increase in the Subcontract amount, or an extension of time, unless Subcontractor provides written notice as required by Article 3. Subcontractor shall provide Contractor with any requested scheduling information for Subcontractor's Work.

1.4 PRIORITY OF WORK. Contractor shall have the right to decide the time, order and priority in which the various portions of the Project shall be performed. Subcontractor agrees to take all action necessary to ensure the completion of the Work within the time specified.

1.5 COORDINATION. Subcontractor shall: (a) cooperate with Contractor and all others whose work may interfere with Subcontractor's Work; (b) specifically note and immediately advise Contractor in writing of any such interference with Subcontractor's Work; and (c) participate in the preparation of coordination drawings and work schedules in areas of congestion.

1.6 DELAY. If progress of Subcontractor's Work is substantially delayed without the fault or responsibility of Subcontractor, then the time for Subcontractor's Work shall be extended by Change Order to the extent obtained by Contractor under the Contract Documents and the Project Schedule shall be revised accordingly. Contractor shall not be liable to Subcontractor for any damages or additional compensation because of delays caused by any person not a party to this Agreement unless Contractor has first recovered the same on behalf of Subcontractor from said person. Otherwise, Subcontractor's sole and exclusive remedy for delay shall be an extension in the time for performance of Subcontractor's Work. Subcontractor shall not be entitled to any extension of time unless a) Subcontractor notified Contractor in writing of the delay within forty-eight (48) hours of the event giving rise to the delay; b) further supplements its notice with a claim within five (5) working days as required by Paragraph 3.2 and/or 3.3, providing detailed cost and supporting documentation, and c) demonstrates that Subcontractor could not have anticipated or avoided the delay and has used all available means to minimize the impact. Failure to meet these conditions and provide timely notice shall result in waiver of Subcontractor's claim for an extension of time.

1.7 DELAY CAUSED BY SUBCONTRACTOR. Should the progress of the Work or the Project be delayed by any fault or neglect or act or failure to act of Subcontractor or any of its officers, agents, employees, subcontractors, or suppliers that causes any additional cost, expense, liability, or damage to Contractor, Subcontractor shall compensate Contractor for and indemnify against all such costs, expenses, damages, and liability.

ARTICLE 2 – PAYMENT

2.1 PAYMENT FOR THE WORK. In consideration of all of the covenants and conditions of this Subcontract Agreement and the full, faithful and prompt performance of all of the terms and conditions of the Contract Documents pertaining to the Subcontractor's Work, Contractor agrees to pay to Subcontractor the Contract Price as herein above set forth, and Subcontractor agrees to receive and accept the Contract Price as full compensation for doing all things required to complete Subcontractor's Work in accordance with the Contract Documents.

Payment will be made to Subcontractor for Work performed, as measured and certified to by Owner or its representative, which shall be accepted by Subcontractor as full compensation for furnishing all material and for doing all Work contemplated and embraced in this Subcontract Agreement. In the event Subcontractor fails to invoice or otherwise indicate its contention as to the value of such Work by the payment application due date, Contractor may estimate the value thereof.

Receipt of payment from Owner for Subcontractor's Work is a condition precedent to Contractor's obligation to make payment to Subcontractor, regardless of the reason for Owner's nonpayment, whether attributable to the fault of Owner or Subcontractor, or to any other cause. Payment will be made to Subcontractor within seven (7) days after Contractor receives payment from Owner, and will equal the value of the Work done by Subcontractor per Owner's estimate, less the sum of previous payments and less retention. Payment as used in this clause shall include retainage, progress payments, payment for change orders and extra work, and final payment. Subcontractor hereby acknowledges that it relies solely and exclusively on the credit of Owner, not Contractor, for payment for its Work.

2.2 GENERAL PROVISIONS

2.2.1 PAYMENT USE RESTRICTION. No payment received by Subcontractor shall be used to satisfy or secure any indebtedness other than one owed by Subcontractor to a person furnishing labor, materials, supplies and/or equipment for use in performing Subcontractor's Work. Payments may not be assigned to a factor or other third party. Attempts to make such an assignment shall be deemed a material breach of this Agreement.

2.2.2 PAYMENT USE VERIFICATION. Contractor shall have the right to contact Subcontractor's subcontractors and suppliers to ensure that the same are being paid by Subcontractor for labor or materials furnished for use in performing Subcontractor's Work and to pay by joint check if Contractor deems it necessary, or preferred.

2.2.3 SUBCONTRACTOR PAYMENT FAILURE. In the event Contractor has reason to believe that labor, material or other obligations incurred in the performance of Subcontractor's Work are not being paid, Contractor shall give written notice to Subcontractor and may take any steps deemed necessary to ensure that any progress payment shall be utilized to pay such obligations.

If upon receipt of said notice, Subcontractor does not: (a) Supply evidence to the satisfaction of Contractor that Subcontractor's obligations have been paid or (b) Post a bond indemnifying Owner, Contractor, Contractor's surety, if any, and the premises from a claim or lien; then Contractor shall have the right to retain out of any payments due or to become due to Subcontractor, pursuant to this Agreement and/or any other Agreements between Subcontractor and Contractor, a reasonable amount to protect Contractor from any and all loss, damage or expense including attorney's fees arising out of or relating to any such obligation until the obligation has been satisfied by Subcontractor.

2.2.4 PAYMENT NOT ACCEPTANCE. Payment to Subcontractor is specifically agreed not to constitute or imply acceptance by Contractor or Owner of any portion of Subcontractor's Work.

2.2.5 PREPAYMENT OPTION. Contractor may, at its sole discretion, offer payment in advance of the normal payment terms in exchange for a 3% discount by Subcontractor. The terms of the payment and discount may be negotiated and must be mutually agreed upon by both parties.

2.3 PROGRESS PAYMENTS

2.3.1 SCHEDULE OF VALUES. Subcontractor shall provide a schedule of values satisfactory to Contractor and Owner no more than fifteen (15) days from the date of execution of this Agreement.

2.3.2 TIME OF APPLICATION. Each month, Subcontractor shall submit progress payment applications to Contractor as specified on the signature page of this Agreement for Work performed up to and including the last day of the payment period indicating Work completed and, to the extent allowed under Article 2.3.4, materials suitably stored during the preceding payment period. Progress payment requisitions delivered after the specified day of each payment period will be included in the following month's billing. Billings shall be in the required format and include sufficient detail in accordance with the requirements of the Project Manager. The submission date may be altered based on Owner requirements for payment.

2.3.3 LIEN WAIVERS AND AFFIDAVITS. When required by Contractor, and as a prerequisite for payment, Subcontractor shall provide in a form satisfactory to Owner and Contractor, lien and claim waivers and affidavits from Subcontractor, and its sub-subcontractors and suppliers for the completed Subcontractor's Work. Such waivers may be made conditional upon payment.

2.3.4 STORED MATERIALS. Unless otherwise provided in the Contract Documents, and if approved in advance by Owner, applications for payment may include materials and equipment not incorporated in Subcontractor's Work but delivered and suitably stored at the site or at some other location agreed upon in writing. Approval of payment application for such stored items on or off the site shall be conditioned upon submission by Subcontractor bills of sale and applicable insurance or such other procedures satisfactory to Owner and Contractor to establish Owner's title to such materials and equipment or otherwise protect Owner's and Contractor's interests therein, including transportation to the site.

2.4 FINAL PAYMENT

2.4.1 APPLICATION. Upon acceptance of Subcontractor's Work by Owner, Contractor, and if necessary, the Architect, and upon Subcontractor furnishing evidence of fulfillment of Subcontractor's obligations in accordance with the Contract Documents and Article 2.4.2, Contractor shall forward to Owner Subcontractor's application for final payment without delay.

2.4.2 REQUIREMENTS. Before Contractor shall be required to forward Subcontractor's application for final payment to Owner, Subcontractor shall submit to Contractor: (a) an affidavit that all payrolls, bills for materials and equipment, and other indebtedness connected with Subcontractor's Work for which Owner or Owner's property or Contractor or Contractor's surety might in any way be liable, have been paid or otherwise satisfied; (b) consent of surety to final payment, if required; (c) satisfaction of required closeout procedures; and (d) other data if required by Contractor or Owner, such as receipts, releases, and waivers of liens to the extent and in such form as may be designated by Contractor or Owner.

Final payment shall constitute a waiver of all claims by Subcontractor relating to payment for Subcontractor's Work, but shall in no way relieve Subcontractor of liability for the obligations assumed under Article 4.9 hereof, or for faulty or defective work.

2.4.3 TIME OF FINAL PAYMENT. Final payment of the balance due of the contract price shall be made to Subcontractor (a) upon receipt of Owner's waiver of all claims related to Subcontractor's Work except for unsettled liens, unknown defective work, and non-compliance with the Contract Documents or warranties, and (b) within seven (7) days after receipt by Contractor of final payment from Owner for such Subcontractor's Work. There shall be no partial release of retention or partial acceptance of any portion of Subcontractor's Work.

2.4.4 FINAL PAYMENT DELAY. If Owner or its designated agent does not issue a Certificate for Final Payment or Contractor does not receive such payment for any cause which is not the fault of Subcontractor, Contractor shall promptly inform Subcontractor in writing. Contractor shall also diligently pursue, with the assistance of Subcontractor, the prompt release by Owner of the final payment due for Subcontractor's Work. At Subcontractor's request and expense, to the extent agreed upon in writing, Contractor may institute all reasonable legal remedies to mitigate the damages and pursue full payment of Subcontractor's application for final payment including interest thereon.

ARTICLE 3 – CHANGES AND CLAIMS

3.1 CHANGES. When Contractor so orders in writing, Subcontractor, without nullifying this Agreement, shall make any and all changes in the Work which are within the general scope of this Agreement. If Contractor and Subcontractor cannot agree upon a mutually acceptable fixed price for such changes, or if Contractor otherwise directs Subcontractor to proceed on a Time and Material basis, Subcontractor shall execute the Work without delay and document all costs on a Time and Material basis. When working on a Time and Material basis Subcontractor shall submit all tickets and documents related to that portion of the Work for verification at the end of the same day the work is performed. Failure to do so may result in rejection of all costs for that day without recourse. Adjustments in the Price or contract time, if any, resulting from such changes shall be set forth in a Subcontract Change Order pursuant to the Contract Documents. No such adjustments shall be made for any such changes performed by Subcontractor that have not been so ordered by Contractor. Should the terms of Contractor's Agreement with Owner require different or additional action by Subcontractor in regards to Changes in the Work, such terms shall apply and take precedence over the requirements of this agreement. Contractor and Owner shall have the right to examine, inspect, copy and audit the books and records of Subcontractor and any sub-subcontractors with respect to all changed or added work.

It is expressly agreed that, except in an emergency endangering life or property, no additions or changes to the Work shall be made without Contractor's written order; and Contractor shall not be liable to Subcontractor for any extra labor, materials, equipment, or subcontracted work furnished without such written order. No officer, employee, or agent of Contractor is authorized to direct any extra or changed work by oral order.

3.2 CLAIMS RELATING TO OWNER. Subcontractor agrees to make all claims for additional compensation and/or extensions of time which Owner is or may be liable in the manner provided in the Contract Documents for like claims by Contractor upon Owner. Notice of such claims shall be given by Subcontractor to Contractor within forty-eight (48) hours prior to the beginning of Subcontractor's Work or the event for which such claim is to be made, or immediately upon Subcontractor's first knowledge of the event, whichever shall first occur. Subcontractor agrees that failure to strictly comply with these notice requirements shall result in the full and final waiver of its claim(s). Contractor does not waive the requirement for timely written notice unless Contractor's waiver is unequivocal, explicit, and in writing.

3.3 CLAIMS RELATING TO CONTRACTOR. Subcontractor shall give Contractor written notice of all claims not included in Article 3.2 within forty-eight (48) hours of the beginning of the event for which claim is made. Subcontractor agrees that failure to strictly comply with these notice requirements shall result in the full and final waiver of its claim(s). Contractor does not waive the requirement for timely written notice unless Contractor's waiver is unequivocal, explicit, and in writing. All unresolved claims, disputes and other matters in question between Contractor and Subcontractor not relating to claims included in Article 3.2 shall be resolved in the manner provided in Article 9.

3.4 EXECUTION OF CHANGES. Changes, including increases or decreases in the Subcontract Price, will be made only by Contractor's issuance of a Change Order. If Subcontractor objects or disagrees in any way with the scope, terms, construction time, or pricing included in a Contractor issued Change Order, Subcontractor shall so notify Contractor in writing within seven (7) calendar days of the date such Change Order is issued. With any written notice of objection, Subcontractor shall also submit a claim for equitable adjustment, including all appropriate evidence to support such claim. If Subcontractor fails to so notify Contractor, such Change Order shall become final and accepted by Subcontractor, properly making it part of the Subcontract Agreement. Subcontractor acknowledges that, unless expressly stated otherwise within a written Change Order, any change in the price and time effected through a written Change Order shall constitute full payment and accord and satisfaction for all cost incurred, labor performed, material and equipment furnished, any overhead, profit, and any delay, acceleration, or loss of efficiency associated with the change in the Work.

ARTICLE 4 – SUBCONTRACTOR'S OBLIGATIONS

4.1 OBLIGATIONS DERIVATIVE. Subcontractor binds itself to Contractor under this Agreement in the same manner as Contractor is bound to Owner under the Prime Contract Documents for that Work which is Subcontractor's responsibility. The Prime Contract Documents include, without limitation, the Agreement between Owner and Contractor, Conditions of the Prime Contract (General, Supplementary and Other Conditions), Drawings, Specifications, Addenda issued prior to the execution of the Prime Contract, other documents listed in the Prime Contract Documents and Modifications issued after execution of the Agreement.

4.2 INDEPENDENT CONTRACTOR. No employment, partnership, or joint venture relationship is created by this Contract. Subcontractor specifically agrees that it is, or prior to the start of the Work will become, and will remain during the performance of this Subcontract, an independent contractor customarily engaged in an independently established business of the same nature as the Work performed under this Subcontract. Subcontractor has the status of "employer" as defined by the Industrial Insurance, Workers' Compensation, Unemployment Compensation, Social Security, and other similar acts of the federal, state, and local government, including independent filing requirements with the IRS and Department of Revenue. Subcontractor shall withhold from its payroll applicable Social Security taxes, Workers' Compensation and Unemployment Compensation contributions, and withholding taxes and pay the same. Contractor shall be in no way liable as an employer of, or on account of, any employees of Subcontractor. Before final payment is made under this Subcontract, Subcontractor shall furnish Contractor affidavits certifying that it has complied with these laws, rules and regulations. Subcontractor hereby agrees to indemnify Contractor for any and all liability under such laws arising from the Work performed under this Subcontract.

4.3 COMPANY POLICIES. Subcontractor agrees that it, its employees, subcontractors and their employees shall be bound by the policies identified herein and/or attached by Exhibit to this Agreement. Adherence to these policies is required for all employees assigned at this Project site. In the event of non-compliance, Subcontractor employee may be subject to the Safety Disciplinary Policy (Exhibit C) or Contractor may, in its sole discretion, declare a material breach of this Agreement and cancel, terminate, or suspend the Agreement and utilize the remedies available under Article 10.

Subcontractor's failure to prevent damage, injury or loss pursuant to this section shall be deemed a material breach of this Agreement and shall be a complete defense to any claims against Subcontractor arising out of or related to such breach and damages. Subcontractor agrees to defend, indemnify and hold Contractor harmless from any claims, liability, fines, costs, expense or damage (including attorney fees) arising out of, or relating to, such a breach, including, but not limited to, a claim asserted by a subrogee, insurer or assignee of Subcontractor.

4.3.1 ALCOHOL AND DRUG POLICY. Contractor complies with the Construction Industry Drug Free Workplace and the Washington Construction Industry Substance Abuse programs ("Contractor's Substance Abuse Program").

All subcontractors working on an Andersen Construction worksite are expected to fully cooperate with the goals of a drug and alcohol free worksite and have an employment drug and alcohol testing program for their own employees which meets or exceeds the Construction Industry Drug Free Workplace program criteria. Following are minimum criteria for an acceptable employer administered alcohol and substance abuse program:

- Pre-employment testing of all employees, or proof of a valid test within the past six months
- Mandatory post-accident testing for injuries requiring medical treatment or resulting in damage
- Allowance for testing based on reasonable suspicion
- Follow-up testing, disciplinary action up to and including termination, or mandatory enrollment in any recommended treatment programs or education programs.

Use of a Department of Transportation or Union mandated and/or administered substance abuse program will constitute satisfactory compliance with Article 4.3.1 if said programs are applicable to all subcontractor or lower-tier subcontractor employees to be employed at the work site.

It is the responsibility of Subcontractor to ensure that their employees and lower-tier subcontractor employees have proof of verified negative drug and alcohol test prior to reporting for work at the job site.

In the event Subcontractor does not maintain or enforce a substance abuse program meeting these criteria, Contractor shall have the right, but not the obligation, to require Subcontractor to comply with Contractor's Substance Abuse Program which includes pre-employment, random and/or mass drug and alcohol testing of on-site employees. All costs thereof, including administrative and laboratory costs and payroll time, shall be borne by and charged to Subcontractor and any employee testing positive shall be immediately removed from the site and not allowed on any Contractor work site for a minimum period of one year.

4.3.2 SAFETY. Without limitation, Subcontractor specifically agrees to comply with all provisions, regulations and requirements of any federal, state or local statute or regulation concerning occupational safety and health, and with any rules and regulations promulgated pursuant thereto. Subcontractor further agrees it has received a copy of Contractor's Safety Handbook (Exhibit A) and will fully comply with all provisions and requirements therein, unless otherwise in violation of federal, state, or local statute or regulation.

4.4 COMPLIANCE WITH LAWS. Subcontractor agrees to be bound by, and at its own cost, comply with all federal, state and local laws, ordinances and regulations (hereinafter collectively referred to as "laws") applicable to Subcontractor's Work including, but not limited to, equal employment opportunity, minority business enterprise, women's business enterprise, disadvantaged business enterprise, safety and all other laws with which Contractor must comply according to the Contract Documents.

Subcontractor shall indemnify, defend and hold Contractor harmless from any and all liability, costs, expenses, damages, fines or other loss, including attorneys' fees, arising out of any act or omission of Subcontractor, its agents, employees or subcontractors, in the performance of the Work, which acts or omissions are in violation of or not in compliance with any federal, state, local or other public agency permit, regulation, rule or law, including those pertaining to safety and protection of the environment, air, water, soil, noise, or public or private property.

4.5 PERMITS, FEES AND LICENSES. Subcontractor shall give adequate notices to authorities pertaining to Subcontractor's Work and secure and pay for all permits, fees, licenses, assessments, inspections and taxes necessary to complete Subcontractor's Work in accordance with the Contract Documents.

4.6 PATENTS. Except as otherwise provided by the Contract Documents, Subcontractor shall pay all royalties and license fees, which may be due on the inclusion of any patented materials in Subcontractor's Work. Subcontractor shall defend all suits for claims for infringement of any patent rights arising out of Subcontractor's Work, which may be brought against Contractor or Owner, and shall be liable to Contractor and Owner for all loss, including all costs, expenses, and attorney's fees.

4.7 LOWER-TIER SUBCONTRACTORS AND SUPPLIERS. Any lower-tier subcontractor shall be bound to Subcontractor to the same extent Subcontractor is bound to Contractor and to the same extent Contractor is bound to Owner. Subcontractor shall incorporate by reference this Subcontract into any sub-subcontract or other agreement covering any portion of Subcontractor's Work, and Subcontractor shall cause all legal and other obligations to the extent required by law, this Subcontract, or by the Prime Contract to be included in any lower-tier subcontract or purchase order.

Contractor has the right to pay any lower-tier subcontractor or supplier of equipment or materials, including but not limited to employees thereof, to Subcontractor directly or by two-party check. Payment directly to such persons by Contractor or payment of such persons by Contractor by two-party check shall not create any direct contractual or other obligations owing by Contractor to such persons. Any direct or two-party check made in payment for labor, materials or supplies of Subcontractor shall be deemed for payment accounting purposes as having been made solely for the benefit of Subcontractor in accord with the terms of this Agreement. Subcontractor shall secure the immediate release and satisfaction of any claims of lien, claims against any Contractor's bond or retainage, or claims against any other contractor's bond or retainage resulting from the performance of this Subcontract, and shall bear all expenses incurred by Contractor or Owner, investigating, resisting, or settling such liens or claims, including attorneys' fees. Provided Subcontractor has been paid for all undisputed amounts owed to Subcontractor by Contractor, Subcontractor agrees to defend, indemnify, and hold Contractor and Owner harmless from any claims of lien, any claims against any Contractor's bond or retainage, or any claims against any other contractor's bond or retainage resulting from the performance of this Subcontract.

4.8 ASSIGNMENT. Subcontractor shall not assign any part of this Agreement or the Work of Subcontractor without prior written approval of Contractor, which shall not be unreasonably withheld. Any such assignment, subletting or delegation by operation of law or otherwise, in whole or in part, by Subcontractor of the Work to be performed or any claims arising hereunder without the prior written consent of Contractor shall be deemed a material breach of this Agreement. Contractor shall not recognize or be bound by any assignment of any right to payment earned or to be earned by performance hereunder by Subcontractor unless and until Subcontractor shall receive written notice which reasonably proves the assignment and identifies the rights assigned. Any assignment hereunder shall be subject to, and Contractor reserves, all rights and remedies available to Contractor by law, under this Agreement as against Subcontractor, its sureties and assigns including, without limitation, rights of set–off, to retain monies, to amend or modify this Agreement and to assert all other defenses and claims whether or not arising under this Agreement. The making of any assignment by Subcontractor or any consent thereto by Contractor shall in no event relieve Subcontractor or its sureties hereunder of any other obligations, duties, responsibilities or liabilities.

4.9 WARRANTY. Subcontractor warrants its Work against all deficiencies and defects in materials and/or workmanship and as called for in the Contract Documents. Subcontractor agrees to satisfy such warranty obligations, which appear within the guarantee or warranty period established in the Contract Documents without cost to Owner or Contractor.

If no guarantee or warranty is required of Contractor as it relates to Subcontractor's Scope of Work in the Prime Contract Documents, then Subcontractor shall guarantee or warranty its Work as described above for the period of one year from the date(s) of substantial completion.

Subcontractor further agrees to execute any special guarantees or warranties that shall be required for Subcontractor's Work prior to final payment. If Subcontractor's scope of Work includes the building envelope, or any part thereof, or penetrations of the building envelope, Subcontractor, in addition to all other warranties, warrants its' Work against defects in materials and workmanship for 2 years following substantial completion. As part of this warranty, Subcontractor shall inspect the building envelope and penetrations no less than annually during the 2 year warranty.

4.10 PRIVITY. Until final completion of the Project, Subcontractor agrees not to perform any Work directly for Owner or any tenants thereof, or communicate directly with Owner's representatives in connection with the Project, unless otherwise directed in writing by Contractor. All Work for this Project performed by Subcontractor shall be processed and handled exclusively by Contractor.

ARTICLE 5 – PERFORMANCE

5.1 AUTHORIZED REPRESENTATIVES.

5.1.1 Contractor shall designate one or more persons who shall be Contractor's authorized representative(s) (a) on-site and (b) off-site. Such authorized representative(s) shall be the only person(s) Subcontractor shall look to for instructions, orders and/or directions, except in an emergency.

5.1.2 Subcontractor shall designate one or more persons who shall be the authorized Subcontractor's representative(s) (a) on-site and (b) off-site. Such authorized representative(s) shall (a) be the only person(s) to whom Contractor shall issue instructions, orders or directions, except in an emergency, (b) be available by cell phone during working hours as well as non-working hours, (c) speak English and be able to converse and direct own personnel, and (d) not be replaced without Contractor's prior approval.

5.2 MATERIALS FURNISHED BY OTHERS. In the event the scope of Subcontractor's Work includes installation of materials or equipment furnished by others, Subcontractor shall, immediately upon receipt, make full inspection as to the physical condition and suitability of the material or equipment, and shall immediately notify Contractor in writing, of any defect or nonconformity in the material or equipment. If Subcontractor fails to provide such written notice within forty-eight (48) hours of discovery of each defect or nonconformity, Subcontractor shall be liable for all damages.

Subcontractor shall handle, store and install the items with such skill and care as to ensure a satisfactory and proper installation. Loss or damage due to acts of Subcontractor shall be deducted from any amounts due or to become due Subcontractor.

5.3 WORKMANSHIP. Every part of Subcontractor's Work shall be executed in strict accordance with the Contract Documents in the most sound, workmanlike, and substantial manner. All workmanship shall be as specified, and all materials used in Subcontractor's Work shall be furnished in ample quantities to facilitate the proper and expeditious execution of the Work, and shall be new except such materials as may be expressly provided in the Contract Documents to be otherwise.

5.4 HOUSEKEEPING. Subcontractor shall (a) at all times keep the building and premises free from debris and unsafe conditions resulting from Subcontractor's Work; and (b) broom clean each work area at the end of each shift; (c) clean adjacent work and repair any damage caused by Subcontractor; and (d) remove all equipment, temporary facilities, and surplus material from the jobsite after completion of its Work.

If Subcontractor fails to immediately comply with such clean up duties within twenty-four (24) hours after receipt from Contractor of written notice of non-compliance, Contractor may implement such clean-up measures without further notice and deduct the cost thereof from any amounts due or to become due Subcontractor. In the event Contractor determines emergency conditions exist, Contractor may proceed as above without prior notice.

5.5 AS-BUILTS. Subcontractor shall continuously update a set of As-Built drawings as the Work progresses and provide As-Built drawings and operation and maintenance information when the Work is substantially complete. Current As-Built documents is a condition precedent to making payment to Subcontractor.

5.6 SUBSTITUTIONS. No substitutions shall be made in Subcontractor's Work unless permitted in the Contract Documents and only then upon Subcontractor first receiving all approvals required under the Contract Documents for substitutions. Subcontractor shall indemnify Contractor for any increased costs incurred by Contractor as a result of such substitutions, whether or not Subcontractor has obtained approval thereof.

5.7 PROTECTION OF THE WORK. Subcontractor shall take necessary precautions to properly protect Subcontractor's uninstalled Work and the work of others from damage caused by Subcontractor's operations. Should Subcontractor cause damage to the Work or property of Owner, Contractor or others, Subcontractor shall promptly remedy such damage to the compliance with the Contract Documents, or Contractor may so remedy and deduct the cost thereof from any amounts due or to become due Subcontractor.

5.8 USE OF CONTRACTOR'S EQUIPMENT. Subcontractor, its agents, employees, subcontractors or suppliers shall not use Contractor's equipment without the express written permission of Contractor's designated representative.

If Subcontractor or any of its agents, employees, suppliers or lower tier subcontractors utilize any machinery, equipment, tools, scaffolding, hoists, lifts or similar items owned, leased, or under the control of Contractor, Subcontractor shall be liable to Contractor as provided in Article 6 for any loss or damage (including personal injury or death) which may arise from such use, except where such loss or damage shall be found to have been due solely to the negligence of Contractor's employees operating such equipment.

ARTICLE 6 – INDEMNIFICATION

6.1 SUBCONTRACTOR INDEMNIFICATION. In addition to all other covenants, agreements and promises of defense, indemnification and/or to hold harmless set forth herein, to the fullest extent permitted by law, Subcontractor further agrees to defend, indemnify, and hold harmless Contractor and Owner ("Indemnified Parties") from any and all claims, demands, losses, and liabilities to or by third parties arising from, resulting from, or connected with work performed or to be performed under this Subcontract by Subcontractor, its agents, employees and sub-tier subcontractors and suppliers of any tier, even though such claims may prove to be false, groundless or fraudulent, to the fullest extent permitted by law and subject only to the limitations provided herein.

Subcontractor's duty to indemnify the Indemnified Parties, including the duty and cost to defend, shall not apply to liability for damages arising out of bodily injury to persons or damage to property caused or resulting from the sole negligence of the Indemnified Parties or their agents or employees. Subcontractor's duty to indemnify the Indemnified Parties for liability for damages arising out of bodily injury to persons or damage to property caused by or resulting from the concurrent negligence of (a) the Indemnified Parties or their agents or employees, and (b) Subcontractor or its agents or employees and sub-tier subcontractors and suppliers of any tier shall apply only to the extent of negligence of Subcontractor, its agents, employees and sub-tier subcontractors and suppliers of any tier.

Subcontractor specifically and expressly waives any immunity that may be granted it under any Industrial Insurance Act including the Washington State Industrial Insurance Act, Title 51, RCW, other worker's compensation act, disability benefit act, or other employee benefit act of any jurisdiction which would otherwise be applicable in the case of such a claim. Further, the indemnification obligation under this Agreement shall not be limited in any way by any limitation on the amount or type of damages, compensation or benefits payable to or for any third party under worker's compensation act, disability benefit act, or other employee benefit act; provided Subcontractor's waiver of immunity by the provisions of this paragraph extends only to claims against Subcontractor by Contractor, and does not include, or extend to, any claims by Subcontractor's agents, employees and sub-tier subcontractors and suppliers of any tier directly against Subcontractor.

Should any suit, action or arbitration be commenced in connection with any dispute arising out of or relating to indemnification to obtain judicial construction of any provision of Article 6 of this Subcontract, or to enforce or collect any award obtained during arbitration or judgment or decree of any court, the prevailing party shall be entitled to recover from the losing party its costs and disbursements including all fees of attorneys and experts as well as any actual costs and expenses incurred by the prevailing party in such suit, action or arbitration. In addition, the Indemnified Parties shall be entitled to recover compensation for its in-house expenses (including materials and labor) consumed in its defense. The fees and costs set forth in this section are in addition to those provided in Article 10 of the Agreement.

SUBCONTRACTOR CERTIFIES THAT THIS INDEMNIFICATION PROVISION WAS MUTUALLY NEGOTIATED. SUBCONTRACTOR SPECIFICALLY AGREES AND ACKNOWLEDGES THAT THIS AGREEMENT OF INDEMNIFICATION AND SAVE HARMLESS TOGETHER WITH SUBCONTRACTOR'S WAVIER OF IMMUNITY UNDER RCW TITLE 51, WAS THE SUBJECT OF DISCUSSION AND NEGOTIATION BETWEEN SUBCONTRACTOR AND CONTRACTOR AND THAT SUBCONTRACTOR'S PROMISES AND WAIVERS HEREIN ARE PART OF THE CONSIDERATION FOR CONTRACTOR ENTERING INTO THIS SUBCONTRACT AND SUBCONTRACTORS OBLIGATIONS AND WAIVER HEREIN WERE CONSIDERED BY SUBCONTRACTOR WHEN ARRIVING AT A PRICE FOR WHICH SUBCONTRACTOR AGREED TO DO THE WORK CONTEMPLATED BY THE SUBCONTRACT.

ARTICLE 7 – INSURANCE

Before commencing the Work, Subcontractor shall, at its expense, procure and maintain through the applicable statute of repose the insurance coverages in limits and form as prescribed by Exhibit 10 or as specifically modified on the Cover Page of this Agreement. Certificates for these coverages are a condition precedent to payment being made to Subcontractor.

7.1 CANCELLATION RENEWAL OR MODIFICATION. Prior to commencement of the Work, and as a condition precedent to payment for the Work, Subcontractor shall provide Contractor with properly completed and executed certificate forms, in the form included as a part of Exhibit 10, evidencing the required insurance coverage. All such insurance policies and certificate forms shall contain an endorsement stipulating that no cancellation or reduction in scope of coverage shall be made without giving twenty (20) days advance written notice sent Registered Mail to Contractor. In the event Subcontractor fails to obtain or maintain any insurance coverage required under the Contract, Contractor may purchase such coverage and charge the expense thereof to Subcontractor. Contractor's approval, purchase, or maintenance of any insurance under the Contract shall not constitute a limit on Subcontractor's liability.

7.2 NO LIMITATIONS. The provisions of this paragraph are not intended to, and shall not, relieve or excuse Subcontractor from any of its other obligations under the Contract, including its obligations to hold Contractor harmless in the manner and to the extent provided in the Contract's indemnification provisions.

7.3 INSURANCE COMPANIES. All insurance companies shall be subject to approval of Contractor. At a minimum, each insurance company shall maintain an A.M. Best rating of A-:VII. Any downgrading of an insurance company's rating, below the acceptable minimum level, shall be the basis for replacement of that insurance carrier upon written notice to Subcontractor by Contractor. Such replacement shall be made within thirty (30) days of such notification, at no additional expense to Contractor.

7.4 SUBLET. Subcontractor agrees that in the event any of the Work is further sublet, Subcontractor will arrange for insurance to be provided to the full extent as herein provided, including Contractor and Owner as additional insureds, and that such insurance be primary and non-contributory.

7.5 MISCELLANEOUS. Subcontractor's failure to prevent damage, injury or loss may be deemed a material breach of the Subcontract Agreement and shall be a complete defense to any claims arising out of or related to such a breach and damages. Subcontractor agrees to indemnify and defend Contractor from any claims arising out of, or relating to, such a breach including, but not limited to, a claim asserted by a subrogee, insurer or assignee of Subcontractor. All insurance premiums paid by Subcontractor shall be deemed to have been paid on behalf of Contractor as additional insured, and all losses paid from Subcontractor's policies shall be deemed to have been paid on behalf of Contractor as additional insured. Any deductibles or self-insured retentions shall be the responsibility of Subcontractor or its designated design professional(s). No deductibles or self-insured retentions shall be greater than $25,000 without the written approval of Contractor. Subcontractor and its designated professional(s) shall be responsible for any loss arising out of coverage denial by its insurance carrier.

ARTICLE 8 – BONDS

8.1 SUBCONTRACT BOND. If a Performance and Payment Bond is required of Subcontractor under this Agreement, Subcontractor shall provide same. Said bonds shall be in the full amount of this Agreement in a form and by a surety satisfactory to Contractor.

In the event Subcontractor shall fail to promptly provide such requested bonds, Contractor may terminate this Agreement and re-let the work to another subcontractor and all Contractor costs and expenses incurred thereby shall be paid by Subcontractor.

ARTICLE 9 – RESOLUTION FOR CLAIMS AND DISPUTES

Any claim arising out of or relating to the interpretation, construction, or performance of the Contract Documents, or breach thereof, shall be resolved only in the manner set forth herein.

9.1 PASS THROUGH CLAIMS. In the event of any dispute or claim between Contractor and Owner which directly or indirectly involves the Work performed or to be performed by Subcontractor, or in the event of any dispute or claim between Contractor and Subcontractor caused by or arising out of conduct for which Owner may be responsible, Subcontractor shall be bound to Contractor and Contractor agrees to be bound to Subcontractor to the same extent that Contractor is bound to Owner by the terms of the Prime Contract Documents and by any and all procedures and resulting decisions, findings, determinations, or awards made thereunder by the person so authorized in the Prime Contract, or by an administrative agency, board, court of competent jurisdiction or arbitration. If any dispute or claim of Subcontractor is prosecuted or defended by Contractor together with disputes or claims of Contractor's own, and Subcontractor is not directly a party, whether Subcontractor's claims or dispute is Owner-related and subject to these pass through provisions shall be at the sole discretion of Contractor. Subcontractor shall cooperate fully with Contractor and to furnish all documents, statements, witnesses, and other information required by Contractor for such purpose and shall pay or reimburse Contractor for all expenses and costs, including reasonable attorneys' fees incurred in connection therewith, to the extent of Subcontractor's interest in such claim or dispute.

Subcontractor shall be bound by the procedure and preliminary and final determinations as specified in the Prime Contract and agrees that it will not take, or will suspend, any other action or actions with respect to any such claims and will pursue no independent litigation with respect thereto, pending final determination of any dispute resolution procedure between Owner and Contractor. It is expressly understood and agreed that as to any and all claims asserted by Subcontractor in connection with this project arising from the actions or fault of Owner, Contractor shall not be liable to Subcontractor for any greater amount than Owner is liable to Contractor, less any markups or costs incurred by Contractor and Subcontractor agrees that Contractor's receipt of payment from Owner is a condition precedent to Subcontractor's right to payment from Contractor. As to any claims asserted by Subcontractor for or on account of acts or omissions of Owner or its agents or design professionals, at the sole option of Contractor, Subcontractor shall prosecute such claims in Contractor's name. For any amount recovered or collected (whether through proceedings or settlement) by Subcontractor, Contractor shall be entitled to 10% of such amount received or collected as its mark-up for such claims. Subcontractor shall have full responsibility for preparation and presentation of such claims and shall bear expenses thereof including attorneys' fees. In the event Contractor has a claim with Owner or third-party which includes Subcontractor's Claim, and which is resolved on a global basis, Subcontractor's recovery for Subcontractor Claim will be computed on a pro-rata basis after Contractor's costs (including attorneys' fees, expert fees, consultant fees) arising from pursuing Contractor's claim with Owner or third-party, and Contractor's overhead and profit markup on Subcontractor Claim are subtracted from the offer or award.

9.2 CLAIMS BETWEEN CONTRACTOR AND SUBCONTRACTOR. Any Claim arising at any time during or after the construction of the Project shall be resolved, if possible, by good faith negotiations between duly authorized representatives of Subcontractor and Contractor. If such duly authorized representatives are unable to resolve any Claim within a reasonable time after written notice of such dispute together with all relevant supporting documentation is given by either party to the other, the Claim shall be submitted by either party to mediation as provided in Section 9.2.1 below.

9.2.1 MEDIATION. Any Claim arising out of or related to the Contract Documents, is subject to mediation as a condition precedent to arbitration or litigation. The parties shall endeavor (but not be required) to resolve their Claims by mediation which, unless the parties mutually agree otherwise, shall be in accordance with the Construction Industry Mediation Rules of the American Arbitration Association currently in effect. Request for mediation shall be filed in writing with the other party to the Contract and with the American Arbitration Association ("AAA"). The parties shall share the mediator's fee and any filing fees equally. The mediation shall be held in the place where the Project is located, unless another location is mutually agreed upon. Agreements reached in mediation shall be enforceable as settlement agreements in any court having jurisdiction thereof.

9.2.2 ARBITRATION / LITIGATION. Any claim not resolved by mediation shall be decided, at Contractor's sole election, by binding arbitration or litigation in a court of competent jurisdiction. If Contractor elects arbitration, the arbitrator shall be selected by mutual agreement of Contractor and Subcontractor. If Subcontractor and Contractor cannot agree on an arbitrator, then any arbitration will be conducted with the American Arbitration Association in accordance with the Construction Industry Arbitration Rules of the AAA currently in effect. Contractor's right to elect arbitration shall be specifically enforceable under the prevailing arbitration law. The award rendered by the arbitrator(s) shall be final and judgment may be entered upon it in accordance with applicable law in any court having jurisdiction.

9.2.3 NOTICE OF ARBITRATION DEMAND. If Contractor elects arbitration and Subcontractor and Contractor cannot agree on an arbitrator within thirty (30) days of notice of the claim, then notice of the demand for arbitration shall be filed in writing with the other party to this Agreement and with the American Arbitration Association. The notice shall in no event be made after the date of final acceptance of Subcontractor's Work by Owner or when institution of legal or equitable proceedings based on such claim, dispute or other matter in question would be barred by the applicable statute of limitations, whichever shall first occur.

9.3 WORK CONTINUATION AND PAYMENT. Unless Contractor directs otherwise, Subcontractor shall carry on Subcontractor's Work and maintain the Project Schedule pending any dispute, including arbitration and litigation.

9.4 NO LIMITATION OF RIGHTS OR REMEDIES. Nothing in this Article shall limit any rights or remedies not expressly waived by Subcontractor which Subcontractor may have under lien laws or payment bonds.

ARTICLE 10 – CONTRACTUAL DEFAULT / SUSPENSION / TERMINATION

10.1 CONTRACTUAL DEFAULT.

10.1.1 NOTICE TO CURE. If Subcontractor and/or its sub-tier contractors: (a) refuse or fail to supply enough properly skilled workers, proper materials, or maintain the Project Schedule (as such dates may be changed in accordance with the Agreement); (b) fail to make prompt payments for its workers, sub-subcontractors or suppliers; (c) is found to be non-compliant with any project-specific safety requirement or fail to implement measures to ensure worker or public safety; (d) disregard laws, ordinances, rules, regulations or orders of any public authority having jurisdiction; or (e) otherwise fail to comply with any provision of this Agreement (hereinafter collectively "contractual default"); Contractor may issue written notice to Subcontractor requiring a written cure/recovery plan detailing how Subcontractor intends to correct the contractual default(s). If a Notice to Cure is issued under this section 10.1, and Subcontractor fails within **forty-eight (48) hours** after receipt thereof to submit a written Corrective Action Plan, and commence and continue satisfactory correction of the contractual defaults with diligence and

promptness, then Contractor, without further notice or prejudice to any rights or remedies, shall have the right to any or all of the remedies outlined in Paragraph 10.1.2.

With respect to any Safety and Regulatory Violation (subsections (c) and (d), above), Subcontractor may, in Contractor's sole discretion, be subject to the terms of Contractor's Safety Disciplinary Policy (Exhibit C).

10.1.2 SUPPLEMENTATION / REPLACEMENT / WITHHOLDING / TERMINATION. If Subcontractor fails to take any action dictated by the Notice to Cure issued pursuant to 10.1.1, or if, in the reasonable discretion of Contractor, Subcontractor's actions or non-actions have jeopardized or otherwise impacted the safety or schedule of the Project, Contractor may (a) supply such number of workers and quantity of materials, equipment and other facilities as Contractor deems necessary for the completion of Subcontractor's Work, or any part thereof, which Subcontractor has failed to complete or perform and charge the cost thereof to Subcontractor, who shall be liable for the payment of same, including reasonable overhead profit and attorney fees; (b) contract with one or more additional contractors to perform such part of Subcontractor's Work as Contractor shall determine will provide the most expeditious completion of the total Work and charge the cost thereof to Subcontractor; (c) withhold payment of any monies due to Subcontractor pending corrective action to the extent required by and to the satisfaction of Contractor and Owner; or (d) terminate the Agreement.

10.1.3 USE OF SUBCONTRACTOR'S EQUIPMENT. If Contractor performs Work under this Article or sublets such work to be so performed, Contractor and/or the persons to whom work has been sublet shall have the right to take and use any materials, implements, equipment, appliance or tools furnished by, belonging or delivered to Subcontractor and located at the Project.

10.1.4 RIGHT OF OFFSET. All costs and expenses paid or incurred in the implementation and administration of the Corrective Action Plan shall be Subcontractor's sole responsibility. Contractor may deduct from any payments due or to become due to Subcontractor all of the costs incurred by Contractor in exercising the rights and remedies outlined herein, including reasonable overhead, profit and attorney's fees on this Project or any other project performed by Subcontractor. Subcontractor shall be liable for the payment of any amount by which such expense may exceed the unpaid balance of the Subcontract Price. In the event Contractor terminates the Agreement for the reasons identified in 10.1, Subcontractor shall not be entitled to receive further payment until the Work is finished.

10.1.5 SUBCONTRACTOR'S BANKRUPTCY. It is recognized that, if Subcontractor is adjudged bankrupt, makes a general assignment for the benefit of creditors, or if a receiver is appointed for the benefit of its creditors because Subcontractor's insolvency, such circumstances could impair or frustrate Subcontractor's performance of this Agreement. Accordingly, the parties to the Agreement agree that upon the occurrence of any such event, Contractor shall be entitled to request of Subcontractor or its successor in interest adequate assurance of future performance in accordance with the terms and conditions of the Contract Documents and Subcontractor shall have **seven (7) business days** to provide such assurances. Subcontractor's failure to comply with such request shall entitle Contractor to terminate this Agreement immediately and to the accompanying rights thereunder. Contractor shall be entitled to recover its damages resulting from such termination including, but not limited to, all costs incurred by Contractor in excess of the Contract Sum and, if the Work is not completed by the scheduled date of Substantial Completion, damages for delay.

10.2 SUSPENSION / TERMINATION BY OWNER. Should Owner suspend or terminate the Prime Contract or any part of the Prime Contract which includes Subcontractor's Work, Contractor shall so notify Subcontractor in writing and upon receipt of said notice Subcontractor shall immediately suspend / stop Subcontractor's Work.

In the event of such Owner suspension or termination, Contractor's liability to Subcontractor is limited to the extent of Contractor's recovery on Subcontractor's behalf under the Contract Documents.

10.3 TERMINATION FOR CONVENIENCE. Contractor may order Subcontractor in writing to suspend, delay, or interrupt all or any part of Subcontractor's Work for such period of time as may be determined to be appropriate for the convenience of Contractor.

Subcontractor shall notify Contractor in writing within ten (10) working days after receipt of Contractor's order of the effect of such order upon Subcontractor's Work. Any adjustment for time and cost as a result of this termination will be in accordance with the conditions agreed to between Subcontractor and Contractor. Subcontractor shall only be entitled to profit on that portion of the Work actually performed and approved for payment to the date of termination and retainages held upon prior payments. Subcontractor waives any claim for loss of anticipated profits or other damages in the event Contractor exercises this clause.

No claim under this Article shall be allowed for any costs incurred more than ten (10) working days prior to Subcontractor's notice to Contractor.

Neither the Contract Price nor the Contract Time shall be adjusted under this Article for any suspension, delay or interruption to the extent that performance would have been so suspended, delayed, or interrupted by the fault or negligence of Subcontractor.

10.4 WRONGFUL EXERCISE. Any actions by Contractor pursuant to paragraph 10.1 subsequently determined to be wrongful or without just cause shall be deemed to be taken pursuant to paragraph 10.3.

10.5 ASSIGNMENT. Subcontractor hereby assigns, transfers, pledges and conveys to Contractor (effective as of the date of the Subcontract, but only in the event of default, termination, breach or failure by Subcontractor and subject to and to the extent of Contractor's acceptance of such assignment(s)), as collateral security, to secure the obligations under this Subcontract and any other indebtedness and liabilities of Subcontractor to Contractor, all of Subcontractor's rights under the Subcontract, including Subcontractor's right, title and interest in and to (1) all subcontract or supply contracts let by Subcontractor in connection therewith and such Subcontractor's or supplier's surety bonds; (2) all machinery, plant, equipment, tools and materials which shall be on the site or sites of the Work or elsewhere for purposes of the Subcontract, including all materials ordered for the Subcontract; (3) any and all sums due or to become due on the Subcontract; and (4) and actions, causes of action, claims or demands whatsoever which Subcontractor may have in any way arising out of or relating to this Subcontract.

10.6 DAMAGES. If Subcontractor should default in performance of the Work or otherwise commit any act which causes delay to Contractor's work Subcontractor shall be liable for its pro rata share of losses, costs, expenses, liabilities and damages, including but not limited to actual damages (which shall include Contractor's extended general conditions and general requirements), consequential damages and liquidated damages sustained by Contractor, or for which Contractor may be liable to Owner or any other party because of Subcontractor's default or delay.

ARTICLE 11 – CONTRACT INTERPRETATION

11.1 LAW AND EFFECT. This Agreement shall be governed by the law of the state of in which the project is located.

11.2 CONFLICTS. In the event of a conflict between this Agreement, the Prime Contract, and the Contract Documents, the more stringent shall govern.

11.3 INCONSISTENCIES AND OMISSIONS. Should inconsistencies or omissions appear in the Contract Documents, it shall be the duty of Subcontractor to so notify Contractor in writing within three (3) working days of Subcontractor's discovery thereof. Upon receipt of said notice Contractor shall instruct Subcontractor as to the measures to be taken and Subcontractor shall comply with Contractor's instructions.

11.4 SEVERABILITY AND WAIVER. The partial or complete invalidity of any one or more provisions of this Agreement shall not affect the validity or continuing force and effect of any other provision. The failure of either party hereto to insist, in any one or more instances, upon the performance of any of the terms, covenants or conditions of this Agreement, or to exercise any right herein, shall not be construed as a waiver or relinquishment of such term, covenant, condition or right as respects further performance.

11.5 ATTORNEY'S FEES. Should either party employ an attorney to institute suit or demand arbitration to enforce any of the provisions hereof, to protect its interest in any matter arising under this Agreement, or to collect damages for the breach of the Agreement or to recover on a surety bond given by a party under this Agreement, the prevailing party shall be entitled to recover reasonable attorney's fees, expert fees, costs, charges, and expenses expended or incurred therein.

11.6 TITLES. The titles given to the Articles of this Agreement are for ease of reference only and shall not be relied upon or cited for any other purpose.

11.7 ELECTRONIC SIGNATURE. This agreement, contract documents, change orders, or any component thereof maybe executed in counterparts, and may be signed and/or transmitted electronic means, and documents so signed or transmitted shall be deemed originals for all purposes.

11.8 ENTIRE AGREEMENT. This Agreement is solely for the benefit of the signatories hereto and represents the entire and integrated agreement between the parties hereto and supersedes all prior negotiations, representations, or agreements, either written or oral.

Article 1 – Contract Administration

General Notes

1.1. This document is meant to convey common Project information. References will be made to requirements related to on-site work. Suppliers providing material FOB jobsite will not have to comply with the requirements related to on-site work (e.g. drug testing, site cleaning, etc.).

1.2. In the event of a conflict between any of the Contract Documents, precedence will be determined by the requirements of the Contract Documents in the order listed below:

- 1.2.1. Subcontract or Purchase Agreement
  - 1.2.1.1. Exhibit 1: Scope of Clarifications
  - 1.2.1.2. Exhibit 5: Site Specific Work Regulations
  - 1.2.1.3. Other exhibits or attachments to the Agreement
- 1.2.2. Prime Contract between Contractor and the Owner
- 1.2.3. Specifications
- 1.2.4. Drawings
- 1.2.5. National Codes and Industry Standards not referenced in the Contract Documents listed above.

1.3. Subcontractors and Suppliers have examined and investigated the nature, locality, and site of the Work and the conditions and difficulties under which it is to be performed and enter into this Agreement on the basis of its own examination and investigations and is not in reliance upon any opinions or representations from Contractor or the Owner.

1.4. All escalation costs are to be included for the duration of the Project, including, but not limited to labor, material, equipment and fuel escalation.

1.5. All tiers of subcontractors working on this Project will provide a copy of their State of Oregon Construction Contractors Board (CCB) to Contractor.

1.6. All taxes and fees imposed by law associated with the Work are included in the Contract amount and paid by Subcontractor.

1.7. Commencement of Work will be construed as the Subcontractor's acceptance of surfaces and conditions within a specific area. Subcontractor will do a walk-through with Andersen's Superintendent to review the condition of surfaces. It is the responsibility of this Subcontractor to notify Andersen's Superintendent of unacceptable areas at this time. A reasonable amount of time to address the situation must be given before work is to begin.

1.8. Without exception, no publicity releases (newspaper, radio, TV, advertisement, etc.) will be issued without prior approval from Andersen Construction's General Manager.

Bonds

1.9. No Payment and Performance bond is required. Please provide a quote as directed by the Bid/Budget form in the case that it may be determined to be required at a later date.

Insurance

1.10. A Builder's Risk insurance policy is being provided by the Owner for this project approximately Spring 2021 (NTP date for Main Project). Should the Subcontractor's actions cause a claim against said policy, Subcontractor shall be liable for the policy deductible amount up to a maximum of $5,000. The Waiver of Subrogation for insurance does not apply to the policy deductible.

1.11. A Builder's Risk insurance policy is being provided by the Andersen for early work prior to NTP (approximately Spring 2021). Should the Subcontractor's actions cause a claim against said policy, Subcontractor shall be liable for the policy deductible amount up to a maximum of $5,000. The Waiver of Subrogation for insurance does not apply to the policy deductible.

Liquidated/Actual Damages

1.12. If the Subcontractor or Supplier causes a delay that results in the failure to achieve Substantial Completion and/or Final Completion of the Project, Subcontractor or Supplier shall be liable for the payment of its pro rata share of liquidated/actual damages to the Owner at rates dictated through section 6.g. of Exhibit 05.1 - BHS PPS/Andersen Prime Agreement.

Permits

1.13. The Owner will provide the Building Permit and System Development Charges. Subcontractor is responsible for providing and paying for any other permits and fees necessary for the completion of its Work unless noted otherwise.

1.14. Subcontractor will provide copies of all permits and inspection reports to Contractor's Project Superintendent.

Submittals

1.15. Within two (2) weeks of Award of Contract, provide a submittal schedule and a list of products requiring the Architect's review or approval which includes the following information:

1.15.1. Specification reference

1.15.2. Intended submission date

1.15.3. Required order release date

1.15.4. Lead times for fabrication and delivery

1.15.5. Anticipated delivery date

1.15.6. Other submittals required for coordination

1.16. Unless otherwise indicated, submittals will be submitted electronically.

1.17. Subcontractor is responsible for processing all deferred submittals through the City, as required by its scope of Work and as outlined in the project specifications. Include delivery and pick up in direct coordination with the City and associated fees.

1.18. Subcontractor to provide as necessary their respective goods and services to complete mock-ups required by the specifications.

1.19. Subcontractor to provide all attic stock on a separate delivery at the end of the project. All material must be new and in unopened packaging and transmitted, inventoried, and approved by Andersen prior to acceptance.

Changes

1.20. Change proposals will be in a format acceptable to Andersen and will conform to the following

guidelines:

1.20.1. Changes will be assigned a Potential Change Items (PCI) number. Please reference this number on all documents associated with the change.

1.20.2. Identify the items of work involved, referencing the appropriate drawings, specifications, details, etc.

1.20.3. Show quantities of materials, labor, equipment, etc. affected.

1.20.4. Provide change proposals from lower tier subcontractors and suppliers.

1.20.5. Mark ups: All mark ups apply to both additive and deductive changes.

1.20.5.1. Self performed work:

1.20.5.1.1. Mark up for overhead is as follows:

1.20.5.1.1.1. On Labor – 15%

1.20.5.1.1.2. On Equipment – 10%

1.20.5.1.1.3. On Materials – 10%

1.20.5.1.1.3.1. Overhead is defined as follows:

1.20.5.1.1.3.1.1. Supervision and Project Management expenses

1.20.5.1.1.3.1.2. Administrative and office expenses, include home office and jobsite office

1.20.5.1.1.3.1.3. Taxes and insurance

1.20.5.2. Subcontracted work:

1.20.5.2.1. Mark up on subcontracted work will is to be the same as section 1.20.5.1. Total mark up for multi-tie Subcontracts shall not exceed 20%.

1.20.6. If applicable, premiums for payment and performance bonds.

1.20.7. Requests for extension of time.

1.21. Andersen's superintendent may direct work to be performed on a Time and Material (T&M) basis by written notice. In order to be paid for this work, submit T&M tickets daily for Andersen's superintendent's review. Tickets without Andersen's verification and signature will not be reimbursed. Change documentation will follow the format outlined above along with the signed T&M tickets. Please note that signed tickets do not guarantee reimbursement, only verification of work completed.

1.22. If Subcontractor needs to work outside of the regular working hours, Subcontractor shall be responsible for costs associated with any stand-by personnel (i.e. elevator operator, hoist operator, electrician, etc.) who are required to be present during the performance of this work as well as additional temporary light, heat and protection required.

1.23. A Change Order Request log will be submitted monthly. This log will indicate all cost and schedule modifications submitted as well as showing rough orders of magnitudes (ROMs) for items without finalized costs. ROMs indicated on this log do not serve as notice of changes as defined in Articles 3.2 and 3.3 of Exhibit 2A.

Personnel

1.24. Subcontractor's representative is required to attend coordination meetings which includes but is not limited to the following:

1.24.1. Pre-mobilization meeting

1.24.2. Weekly Jobsite Safety Walk

1.24.3. Daily huddles

1.24.4. Weekly Pull Planning sessions

1.24.5. Trade Partner Coordination meetings

1.24.6. Monday morning Safety Huddle

1.24.7. Craft lunch meeting (every two weeks)

1.24.8. Twice monthly Functional Team meeting

1.24.9. Weekly Make Ready Schedule meeting

1.24.10. PPS monthly schedule review with key Subcontractors

1.25. This is not a union-only project. Subcontractor agrees to comply with all requirements of a dual gate system for site access, separate entrances for union and non-union labor.

1.26. Andersen Construction and the Owner reserve the right to approve any tier sub-subcontractor intended to perform any portion of the work. In general, all terms of the Agreement apply to all tiers of Subcontractor's subcontractors unless otherwise noted.

1.27. The Contractor and the Subcontractor are equal opportunity employers. The Subcontractor will comply with all federal, state, and local laws and regulations concerning equal employment opportunity and non-discriminatory hiring policies. The Subcontractor will comply with all requirements of the Contract and Contract Documents concerning affirmative action in hiring policies and subcontracting and procurement.

1.28. Use of tobacco and vaping products is not permitted on site.

1.29. Eating and drinking is not permitted on site except in the designated lunch and break areas. Water is the only drink acceptable onsite.

Parking

1.30. Parking will not be available onsite and is the responsibility of Subcontractor.

Schedule and Work Plans

1.31. Within two (2) weeks of award of Contract, Subcontractor or Supplier will meet with Andersen to expand the detail of the Project Schedule to further define the items of Work that must precede and follow its Work as well as activities that can occur concurrently with other subcontractors.

1.32. The Project Schedule will be reviewed at the Weekly Subcontractor Coordination Meeting, and more frequently if necessary. Subcontractors and Suppliers are required to participate in the schedule coordination and be prepared to discuss the details of their schedules so Andersen can accurately update the Project Schedule.

1.33. Subcontractor has reviewed the Project Schedule for time of year of installation and made provisions, where necessary, to accommodate inclement weather.

Radios

1.34. Two-way radios are permitted onsite but must be a system approved by Andersen's Superintendent.

1.35. Musical radios or devices, including personal devices, are not permitted onsite.

Field Offices and Storage

1.36. Subcontractors are responsible for providing and maintaining their own field offices. Space will be limited onsite.

1.37. In general, limited space is available for temporary storage of materials and equipment onsite. If approved by the Project Superintendent, temporary storage will be per the following:

1.37.1. Andersen's Project Superintendent will approve the storage locations.

1.37.2. Subcontractor will secure and protect its stored items. Andersen will not be liable for damaged or missing items.

1.37.3. Subcontractor will relocate stored items as necessary to accommodate the Project Schedule.

1.37.4. Upon completion, excess stored materials will be removed from the site by Subcontractor.

Material Deliveries

1.38. Due to the limited space available onsite, deliveries will need to be made just in time for installation. Schedule the deliveries with Andersen's Project Superintendent and utilize designated shared scheduling app (TBD) .

1.39. Subcontractor must be present for all deliveries onsite. Andersen will not accept Subcontractor's or Supplier's deliveries.

1.40. Deliveries which require use of the crane or forklift will be scheduled with Andersen prior to the delivery date.

Layout and Measurements

1.41. The Contractor shall establish principal axis lines of the building and site whereupon the Subcontractor shall lay out and be strictly responsible for the accuracy of the Subcontractor's Work and for any loss or damage to the Contractor or others by reason of the Subcontractor's failure to set out or perform its Work correctly. The Subcontractor shall exercise prudence so that actual final conditions and details shall result in specified alignment of finish surfaces.

1.42. Line and grade controls will be supplied by Andersen as outlined below:

1.42.1. Five (5) elevation bench marks

1.42.2. One (1) longitudinal grid off-set and intersecting grid off-sets spaced no more than 200' apart on each floor.

1.43. Subcontractors and Suppliers will field measure the existing conditions if necessary for the proper fabrication of its materials.

Flagging and Traffic Control

1.44. Subcontractor will provide its own flagger and traffic control, including street use/closure permits (Temporary Street Use Permits) for its scope of Work that complies with Andersen's Safety and Health Program as well as the applicable authorities having jurisdiction.

1.45. Subcontractor will provide copies of all Flagger Certifications prior to starting Work.

1.46. Subcontractor is responsible for street cleaning and repair if necessary due to Subcontractor's operations.

1.47. Subcontractor will comply with all applicable traffic control regulations.

Temporary Facilities

1.48. Temporary toilets and hand-washing facilities will be provided by Andersen.

1.49. Temporary water, for construction purposes, will be provided by the Mechanical Subcontractor.

1.50. Subcontractor is responsible to provide potable drinking water for its personnel.

1.51. Temporary smoke detection systems will be provided by the Fire Alarm Subcontractor.

1.52. Temporary fencing will be provided at the perimeter of the site – see the Site Logistics Plan for locations.

1.52.1. Removal of portions of the fence must be approved by Andersen's Superintendent prior to removal.

1.52.2. Subcontractor will be responsible for removal and replacement of fencing. At no time will an open portion of the fence be left unattended.

1.53. Temporary guardrails and barricades will be provided by Andersen. Temporary removal must be approved by Andersen's Superintendent prior to removal. Open areas will be attended at all times. Guardrails and barricades must be replaced at the end of each shift.

1.54. Temporary stairs and ladders will be provided for general access to the work areas for multiple trades. Subcontractors are responsible for provided their own ladders to complete their work.

1.55. Temporary power and lighting will be provided by the Electrical Subcontractor per the applicable standards and regulations. All other task lighting and power requirements are to be provided by Subcontractor.

1.56. Temporary heat will be provided by Andersen during the interior finishes phase of the Project and to maintain temperature and humidity in the historic structures. The type of system and equipment locations will be determined at a later date and coordinated with the subcontractors requiring it.

1.57. Fire extinguishers will be provided by Andersen in accordance with the applicable standards and regulations. Subcontractor's employees who are performing work that creates sparks or fire hazards will be equipped with additional fire extinguishers.

1.58. Dumpsters will be provided by Andersen – see the Site Logistics Plan for location.

1.59. Temporary pedestrian sidewalk protection or enclosures will be provided by Andersen.

1.60. Scaffolding will not be provided by Andersen. Subcontractors are responsible for providing them and coordinating their use with Andersen.

1.61. Temporary roofing will be installed so the interior work can continue. However, once the permanent roofing is installed, subcontractors requiring roof access for its work must provide protection in the areas of work sufficient to prevent roof damage. Subcontractors are responsible for removing the protection when roof work is complete. Coordinate work with Andersen prior to starting work on or near permanent roofing membranes.

Cranes and Hoists

~~1.62. Andersen will not be providing a crane for this Project.~~

~~1.63. Andersen will be providing two Class VII – Rough Terrain forklifts with operators.~~

~~1.63.1. The forklifts will be a (make and model) - TBD~~

~~1.63.2. The maximum capacity is – TBD (dependent on make and model selected)~~

1.64. ~~If materials or equipment cannot be accommodated by the hoisting facilities provided above,~~ Subcontractor will provide its own means of hoisting and will coordinate it with Andersen's

Superintendent.

Protection of Existing Facilities

1.65. There are extensive underground utilities in the sidewalks surrounding the Project area. In general, driving equipment on the sidewalks is not permitted. However, if it is required, adequate protection must be provided under the equipment to prevent damage to these utilities.

1.66. In addition to required locate and utility protection laws, Andersen Construction's Underground Utility Incident Prevention Program will be followed for any and all trenching and excavation activities, in addition to any other work activities which has potential to impact underground utilities.

1.67. The Subcontractor shall provide and maintain proper shoring and bracing for existing underground utilities, sewers, and building foundations.

1.68. Subcontractor shall provide and maintain protection during site Work for all existing lawns, trees, curbs, gutters, drives, walks, and buildings not noted for removal or repair/replace.

1.69. Subcontractor shall be responsible for the necessary cleaning and repairing of adjacent streets resulting from their operations.

1.70. Shoring of existing utilities (trench boxes/hydraulic jacks, etc.) must have engineering and be submitted 6 weeks prior to use for Andersen review.

Hot Work

1.71. Hot work permits are required for any work that creates sparks or fire hazards and must be obtained from Andersen prior to commencing the work.

1.72. Subcontractors who are performing work that creates sparks or fire hazards must provide additional fire extinguishers, fire resistive blankets, and fire watch in the areas around and below the area where work is being performed. Fire watch will remain in place at least 60 minutes after completion of the task.

Embeds, Backing, and Penetrations

1.73. Subcontractors are responsible for furnishing and installing all items that are embedded in concrete. Concrete pours will not be delayed because embeds were not installed in time.

1.74. Subcontractors requiring items embedded in concrete must provide their own pour watch to ensure their items do not move during the pour.

1.75. Subcontractors are responsible for any rework required to install the missed embeds after the concrete is poured. This includes engineering and labor that may be associated with the alternate methods of installation. Alternate methods of embed installation must be reviewed and approved by the Structural Engineer.

1.76. Backing and blocking will be provided by the drywall subcontractor.

1.76.1. Subcontractors requiring backing or blocking for installation of their materials will provide drawings indicating locations (with dimensions) and type of backing/blocking. These plans will be submitted to the drywall subcontractor one (1) week prior to closure of the walls.

1.76.2. Subcontractors requiring the backing or blocking are responsible to review the installed backing to ensure it is installed properly.

1.77. Unless otherwise noted, for all penetrations through fire-rated assemblies, subcontractors whose work passes through the rated assembly is responsible for cutting the penetration and furnishing

and installing fire-rated sealants to maintain the assembly's rating.

1.78. Unless otherwise noted, for all penetrations through acoustic assemblies, subcontractors whose work passes through the acoustic assembly is responsible for cutting the penetration and furnishing and installing acoustic sealants to maintain the assembly's rating.

1.79. For all penetrations in general, unless shown on the drawings, Subcontractor is responsible for cutting and patching around the penetrations made and providing any covers or escutcheons that may be required.

Out of Sequence Work

N/A.

Daily Reports

1.80. Subcontractors are required to submit a Daily Report per shift by 12:00pm of the next working day. Include the following information:

1.80.1. Work Force: Provide an accurate count of all labor for all tiers of subcontractors on site under this Agreement.

1.80.2. Work Performed: Provide a description of the Work performed including locations within the building / site (i.e. floor, elevation, gridlines, etc.), major equipment used, and quantities installed or placed.

1.80.3. Safety: Review and meetings.

1.80.4. Accidents: List all accidents and near-misses.

1.80.5. Stoppages, Delays, Shortages, and Losses: Delays noted must provide details of the cause.

1.80.6. Time & Material (T&M) Work: Note any T&M work performed.

1.80.7. Inspections: Note all inspections that were scheduled and their results.

1.80.8. Equipment or System Tests and Start Ups

1.80.9. Services connected or disconnected

Nothing provided in the daily reports will be considered a claim or notice of a claim. Claims must follow the requirements defined in the Exhibit 2A, Exhibit 2B, Exhibit 2C, or Purchase Agreement.

Provision for Inspections

1.81. The Subcontractor shall notify the Contractor when portions of the Subcontractor's Work are ready for inspection and schedule and walk any inspector pertaining to their work. The Subcontractor shall at all times furnish the Contractor and its representatives adequate facilities for inspecting materials at the site or any place where materials under this Agreement may be in the course of preparation, process, manufacture or treatment.

Cleaning

1.82. Dust and airborne debris caused by the Work must be controlled by Subcontractor, so it does not contaminate the jobsite and the surrounding streets and properties.

1.83. Subcontractor to dispose of all debris generated by their work to dumpsters provided by Andersen and will leave a zone or area "broom" clean for the next trade prior to vacating.

1.84. Final cleaning will be performed by others.

Quality Management

1.85. Each Subcontractor shall participate in the Quality Management Program as directed by Andersen Construction and shall be responsible for maintaining an acceptable level of quality for this Work.

1.86. After award of the Subcontract and prior to start of his Work, Andersen Construction will schedule a meeting with the Subcontractors to introduce the Quality Management Program and to determine its implementation process.

1.87. The Subcontractor shall monitor the quality of the work as it progresses and will report quality observations, in writing, to Andersen Construction via Daily Report. The acceptable level of quality will be determined by the Owner, the Architect, Andersen Construction, the Independent Testing Laboratory, the Contract Documents, and by sample construction. All work not meeting the acceptable level of quality will be corrected at the Subcontractor's expense.

1.88. Subcontract includes Subcontractor's participation in monthly quality walkthroughs with one of Subcontractor's company principals. Monthly payment is pending an acceptable level of quality.

1.89. Upon completion of Work, Subcontractor is responsible to create a written punch list prior to Andersen's punch list showing completion of items.

1.90. Andersen will be utilizing an electronic quality control and punch list program to assign action items to applicable parties. Subcontractors will be required to use this program to complete and verify these items. The program is available on the internet and in an application form for use with the Apple iPhone and iPad (currently in beta testing for the Android platform and may be available later). Tablets or iPhones are recommended for subcontractor supervision to access software in the field but not required. The same information and capabilities are available online.

Article 3 – Safety

Reference Exhibit A to the Subcontract for Andersen Construction's Safety Handbook. The items listed below are intended to highlight some of the main requirements, and not to be a complete representation of our safety policy.

2.1. In general, Subcontractor's safety program must meet or exceed the requirements of Andersen Construction's safety program as well as the requirements of Federal, State, and Local jurisdictions. In all cases, Subcontractor is required to comply with the most stringent requirements.

2.2. All personnel who will enter the Project site are required to take the Andersen Online Safety Orientation and pass the test prior to entering the site. They are to present themselves to the Andersen jobsite office for verification and a site-specific orientation. At that time, they will be issued the appropriate identification that will allow them to enter the work area.

English: https://launch.comevo.com/andersen-const/928

Spanish: https://launch.comevo.com/andersen-const/1214

2.3. To the extent required or appropriate, the Subcontractor shall provide, erect, and maintain such warning signs, signals, slights, barricades, fences, shoring, cribbing ventilation systems, personal protective or other safety equipment and other devices on or about the Work or the Project as may be necessary for the protection of the Work or the safety of workers or the public. The Subcontractor shall, if necessary or appropriate to the Work, provide all labor, equipment, materials, and supplies necessary for the control of traffic for the performance of the Work, without cost to the Contractor.

2.4. Each subcontractor shall designate a competent person as defined by OSHA to implement the

safety requirements. A competent person from each subcontractor must be on site whenever they have employees working on site, and the name of that person shall be submitted to Andersen. Each subcontractor is required to maintain this position and the competent person(s) shall remain on site until the completion of their work. The subcontractor shall not relinquish or defer responsibility for project safety to its own or subcontractor employees at any time under any circumstances. Where the nature or size of the contract warrants, Andersen may require the subcontractor to employ a full-time, on-site qualified Safety Representative. At a minimum, each subcontractor shall be expected to ensure that at least one of their competent persons has completed an OSHA 30 class within the last 3 years.

2.5. GENERAL SAFETY RULES: the following rules are specific to the site based on known site conditions and are in addition to the site specific safety plan and Andersen-Colas Safety Handbook.

2.6. Subcontractor shall follow Andersen-Colas Construction's drug policy as outlined in the Safety Handbook and submit current drug test results for all employees prior to commencement of work.

2.7. In the event that there is evidence of onsite drug or alcohol use, distribution or possession found on the Andersen – Colas worksite, Andersen-Colas reserves the right to conduct a jobsite wide drug and alcohol testing of all personnel on said worksite.

2.8. Minimum PPE to be worn at all times include safety glasses, hard hat, gloves and work boots. Additional PPE such as Highly Visible vests or clothing shall be worn whenever there is the presence of heavy equipment, articulating equipment, cranes or motor vehicles. Hearing protection will be required most times. Highly visible clothing will be bright orange or yellow-green. Other colors are not considered highly visible. Highly visible clothing required due to equipment and heavy equipment must be a minimum class 2.. For more information on standard PPE, see Andersen-Colas Safety Program (handbook).

2.9. Clothing shall be appropriate to the environment but at a minimum will include long pants and shirts with sleeves. Long sleeved shirts may be required by the task. Clothing shall not include graphic images or words that may be considered offensive or may create a hostile environment.

2.10. All personnel shall be protected from falls greater than six (6) feet more in elevation or in accordance with applicable regulations, whichever is more protective. All personal fall protection equipment must meet the current ANSI Z359 standards. Fall protection training certification must be provided in accordance with Oregon OSHA regulations.

2.11. Safety monitoring systems or controlled decking zones shall NOT be implemented as fall protection without express written permission from Andersen-Colas Construction, which shall be determined jointly by Andersen-Colas Construction's Chief of Operations, Safety Director, Site EHS Manager, and the Site Superintendent.

2.12. Temporary Guardrails and Barricades: Temporary guardrails shall comply with the applicable OSHA regulations. Any subcontractor who damages a temporary guardrail and cannot repair properly must notify an Andersen Supervisor immediately and properly barricade the area to protect others until the temporary guardrail has been properly repaired. Temporary barricades may be required when utilizing heavy equipment, performing demolition activities, or when others must be protected by distance from subcontractors work.

2.13. Structural Steel subcontractor shall be responsible for providing the minimum standard guardrail systems, including toe boards when required at all building floor and roof perimeters and openings immediately following metal decking installation. Maintain guardrails and openings while on site, Maintenance of system will be transferred to General Contractor upon deck turn over.

2.14. Concrete subcontractor shall be responsible for providing the minimum standard guardrail systems, including toe boards when required at all building floor and roof perimeters and openings immediately after the placement of an elevated floor slab or a portion thereof for exposures in own work area.

2.15. For Existing Windows/Openings the subcontractor who removes the window will be required to

install temporary barricades at Punched Windows (new and existing/removed) and maintain during construction. For newly constructed windows/walls/openings: The Drywall subcontractor shall install and maintain guardrail systems at windows with a sill edge less than 39" above the walking / working surface and more than 6' above the lower level. When and where stilts / elevated work surfaces are utilized, additional guardrails shall be installed by trade utilizing stilt/platform at fall exposures equal to the height of the stilt/platform. Spacing between rails cannot exceed 19". Drywall subcontractors shall also maintain handrails in stairways undergoing drywall activities, guardrails at any shaft or other wall or floor opening undergoing drywall installation.

2.16. Excavation / demolition bidder shall be responsible for providing the minimum standard guardrail systems, including toe boards when required at all building floor perimeters and openings created as demolition proceeds as necessary to protect workers. Excavation / demolition contractor shall be responsible for additional edge protection in the event that equipment shall be used on elevated decks.

2.17. Excavation / demolition bidder shall be responsible for providing standard guardrail systems at the basement for the 1950's gym following demolition of the building until such time as no longer necessary. Additional protection for the safe approach zones of equipment may be necessary to properly demarcate safe approach zones.

2.18. General (All Trades): Refer to logistic plan and schedule to evaluate timing of heavy equipment/cranes/scaffolding locations and loading zones. Indicate on proposal assumptions and/or requirements needed to support same provided by Subcontractor Scope of work.

2.19. Roof Access & Fall Prevention: All trades should assume warning lines, and fall protection will not be provided by others & are included in scope of work, unless identified below: There are currently no anchor points on the existing roof that have been designed for personal fall protection.

2.20. At west façade/new gym where slab on deck is added to project, Structural Steel subcontractor will provide and maintain guardrail system while onsite. (general contractor will maintain after steel contractor has left)

2.21. Existing Openings/Penetrations at Roof: Roofing demolition contractor will be responsible for installing and maintaining guardrail system and/or covers to existing openings and potential fall hazards.

2.22. New Openings/Penetrations at Roof: Demolition contractor will be responsible for installing and maintaining guardrail system and/or covers to new openings and potential fall hazards.

2.23. Each Subcontractor shall be responsible for the cost of repairing or replacing guardrails, toe boards, safety barricades, devices, floor hole covers, equipment or other protective coverts, etc. which are damaged or removed during the performance of his work. Additionally, each Subcontractor is responsible for the removal and replacement of guardrails, toe boards, safety barricades, devices, covers, etc. on a daily basis as required to access his work.

2.24. Subcontractors creating a fall hazard through their work activities such as demolition must incorporate into their PTP how the workers will be protected during the work activities that create the hazard, and are responsible for installing / erecting guardrails, floor hole covers or other positive means of protection.

2.25. Any subcontractor removing a guardrail must:

2.26. Ensure that any worker exposed to a fall greater than 6 feet is protected from falling.

2.27. Ensure that the area is adequately protected and demarcated such that others cannot be exposed to a fall hazard.

2.28. Replace the guardrail(s) before the end of the shift or in the work in process, whichever comes first

2.29. Ensure that workers replacing guardrails are properly trained in the OSHA placement and

strength requirements. Violation of this rule is considered a non-negotiable behavior.

2.30. Temporary Shoring:

2.31. Refer to Structural Drawings for requirements for engineered temporary shoring required for the following types of activities:

2.32. Demolition activities

2.33. Slab support for modifications or penetrations to existing slabs/walls/structures

2.34. Wall/Slab Shoring for New Work

2.35. Stablilization to support loads incurred during demolition/construction activities (loading of floor slabs allowable weights).

2.36. If work is NOT defined by the structural drawings, it is the responsibility of the subcontractor to define assumptions in the bid proposal for further clarification by the structural engineer/Andersen-Colas.

2.37. All workers who must utilize personal fall protection, install, erect or dismantle any fall protection device shall be trained in accordance with OAR 437-003-0503.

2.38. Subcontractor personnel may not use Andersen – Colas, Andersen Construction, Colas Construction or ASI Structures personal fall protection equipment.

2.39. Subcontractor personnel may not use Andersen – Colas, Andersen Construction, Colas Construction, SDS or ASI Structures Ladders except those provided for access for multiple trades to upper and lower floors.

2.40. Any and all elevated work, work done outside of or above the perimeter safety handrail and/or vertical debris netting shall require:

2.41. Tethering of tools and materials; and

2.42. Controlled access zone at the lower level

2.43. All exterior accesses to building roof's shall be secured at the end of each night to prevent trespassers.

2.44. All subcontractors performing work on the roof of any structure higher than 6' above the lower level will be responsible for ensuring adequate fall protection for their workers. Andersen-Colas may opt to install warning lines on a roof structure if there are multiple trades working on said roof. Skylights on roofs must be assumed as not to provide adequate protection for a falling worker and therefore must be protected by a guardrail system or hole cover.

2.45. All spark producing work activities within the structures to remain shall require a hot work permit and a fire watch. The fire prevention for these activities shall be in accordance with NFPA 51B and, if applicable, NFPA 101.

2.46. Subcontractor shall provide fire watch for all required spark/flame producing, open flame and welding operations for a minimum of 30 minutes following the end of the work.

2.47. Persons conducting fire watch activities shall not perform other tasks and must be within visual and hearing proximity to the spark producing activities.

2.48. Andersen-Colas Construction shall furnish fire extinguishers, except for cutting and welding, in accordance with OSHA requirements for temporary fire protection during construction. Each Subcontractor's employees who are welding or cutting or performing other spark producing work shall be equipped with a fire extinguisher and be properly trained.

2.49. Subcontractor shall control all exhaust or fumes and dust associated with work. Subcontractors performing welding work shall protect others from the light source via the use of shields if distance is not sufficient.

2.50. All excavations or trenching outside of the perimeter fencing shall be covered prior to end of shift. Any steel plates in the public right of way shall be placed such that the edges are rounded such

that it prevents trip hazard. Any steel plates in the public right of way shall include any DOT and/or PBOT required or recommended warning signs.

2.51. All heavy equipment such as forklifts, backhoes, trackhoes, aerial lifts, etc. must be secured at the end of each shift. Equipment may require the use of steering wheel locks or other positive locking means to prevent trespassers tampering with, starting or moving the equipment.

2.52. All heavy equipment assigned to the project must be equipped with the white sound back up alarms.

2.53. All forklifts with an obstructed rear view require a back up camera.

2.54. No stock piles of soils or demolished debris over 10' high shall be allowed to remain on site over a weekend. Debris piles should be scheduled to be removed from site on a daily basis.

2.55. Excavation and trenching stockpiles must be a minimum of 2' away from the edge of any excavation and shall not exceed 4' in height.

2.56. This project does not require Tier 4 diesel engines, however given the location it is strongly encouraged. Diesel powered equipment operating on the project must be well maintained. Complaints from the neighborhood may result in the removal of any equipment not operating properly or emitting unacceptable levels of exhaust. Indicate at time of bid if any of the equipment proposed for use does NOT meet Tier 4 requirements.

2.57. Reserved* Internal gas combustion engines, propane powered equipment or other equipment that emits carbon monoxide will not be allowed inside buildings undergoing demolition or renovation. Demolition gas/diesel equipment (and all equipment) run inside building must have scrubbers for exhaust. Fresh Air intakes for the building or crawlspace shall not allow equipment to operate or idle nearby.

2.58. Earth moving/demolition equipment with rotating counterweights or superstructures used near or inside the structures must be zero clearance.

2.59. High visibility vests or equivalent must be worn on the construction site during use of heavy equipment, when workers are exposed to highway type vehicles or other equipment that may pose a hazard to workers working / walking around the equipment or when required by the site rules. High visibility clothing may also be necessary when working under the hook of a crane. When workers may be exposed to highway type traffic, high visibility vest, jacket or shirt must be class 2. Highly visible clothing shall be Bright Orange, Bright Yellow (lime green / yellow) per the applicable ANSI standards and/or MUTCD. High visibility vests / clothing may need to be flame resistant if subcontractors work and work location requires both high visibility and produces flame or sparks.

2.60. All traffic control activities for the external site traffic control plan must be conducted in accordance with any site specific traffic control plan and must be conducted by certified traffic control persons (flaggers). Traffic control is the responsibility of each trade/subcontractor and will not be provided by Andersen-Colas. All trucks are to be loaded and unloaded within the boundaries of the project site fence. Under no circumstances are trucks to be off-loaded outside the construction site without approval by Andersen-Colas. Any trucks being offloaded or backed up outside the construction fence or in a public right of way will require a full time spotter.

2.61. The crossing of open sidewalks or bicycle paths via dump trucks, forklifts or other material moving / earth moving equipment will require a certified flagger under the following conditions:

2.61.1. Obscured view of operator

2.61.2. Backing

2.62. Incoming/Outgoing Truck Traffic, Unloading of trucks* immediately adjacent to open lanes of traffic, open sidewalks or open bike paths

2.62.1. Please note: The Use of dump trucks with pup trailers and/or transfer will not be allowed on this project

2.63. All excavation and demolition subcontractors hiring dump truck to move materials on and off site must verify that the truck has passed its daily DOT inspection, is clean, well-marked, and has a flashing beacon and reflective tape on the tongue.

2.64. Truck drivers shall remain inside their truck during loading and unloading provided their truck cab and method of loading does not create a safety concern for the truck driver. If truck drivers must leave the cab of their truck during loading and unloading (for example during loading or unloading via crane) then the hiring subcontractor shall assure the truck driver is located in a place of safety during loading and unloading and has all of the site required PPE.

2.65. When working with jackhammers, pry bars, chipping guns, rotohammers, or other hand tools or whenever concrete cutting and coring will be conducted, it must first be determined if there is a potential power source in the area of impact. Any identified power source must be located and adequately marked. Whenever the potential exists for electric power lines (underground, in concrete slabs or walls) to be impacted by tools the power source must be locked out and tagged out by an authorized person prior to work commencing when possible.

2.66. Any drilling / excavation activities within the reasonable tolerance zone of located utilities:

2.67. Requires a pre-drilling / excavation near utilities meeting that includes the safety department.

2.68. Requires daily permit for the above. See Andersen-Colas's Utility Safety Impact Prevention Program (USIPP).

2.69. Requires di-electric PPE for the above per the association of equipment manufacturers, OSHA and equipment operators manuals.

2.70. Requires potholing every 100' or at a utility / locate direction change.

2.71. Requires potholing 24" beyond the BOTTOM of the located utility.

2.72. Section Placeholder (draft)- Decommissioning /Removals of Below ground Tanks-To be added for future Bid Packages

2.73. Section Placeholder (draft)- Perm. Shoring/Tie Back work-To be added for future Bid Packages

2.74. Section Placeholder (draft)- Shoring/Tie Back work-To be added for future Bid Packages

2.75. Section Placeholder (draft)- Perm Decommissioning of UIC (drywells-To be added for future Bid Packages

2.76. Section Placeholder (draft)- Scaffolding requirements at bldg. exterior and/or covering required for same-To be added for future Bid Packages

2.77. Subcontractor shall maintain a current list and copy of the Safety Data Sheets for all applicable products. Prior to bringing any chemical products onsite, an approval request form must be submitted for review to Andersen-Colas. All chemicals brought on site are to be inventoried with Andersen-Colas, complete with SDS and storage requirements or plans. The contractor's name and address shall be added to each and every storage cabinet, bucket or container of each product. Each subcontractor is responsible for the removal of remaining chemical products no later than when the subcontractor demobilizes. Each subcontractor will be responsible for 150% of the disposal cost of remaining chemical products. Andersen-Colas reserves the right to refuse to allow highly toxic or flammable chemical products to be used on site.

2.78. Subcontractor shall submit documentation of any required safety training. For example, fall protection, forklift operation, aerial lift and mobile elevation work platform (MEWP / scissorlift) operation, excavation competent person, respiratory protection, scaffolding user and erector, etc. as applicable to the specific subcontractor.

2.79. All buildings contain some level of hazardous materials. See Division 2 and drawings (insert info) for the complete survey. It is anticipated that all workers who will work inside or on the buildings, inside any tunnels, perform any demolition, abatement activities, any brick cleaning or tuckpointing activities, window removal/restoration will require a minimum of a two hour asbestos awareness class and a two hour lead awareness class. Said classes must have been completed

within one year of the start date of said activities.

2.80. The 1923 gym red poured flooring rubber membrane contains low levels of mercury. The demolition contractor removing or impacting this floor must conduct personnel exposures via the use of a Jerome meter during the removal of the poured flooring rubber membrane. If any levels of mercury are above a NIOISH REL or Oregon OSHA ceiling level of 0.1 mg/m3, work must stop and workers must be protected via respiratory protection and skin protection specific for mercury exposures. An Industrial Hygienist shall conduct this monitoring.

2.81. All non asbestos abatement workers must complete the appropriate level of asbestos awareness training for the work to be performed (see 1926.1101).

2.82. All workers that will be working inside existing buildings, involving demolition, or interfacing with Lead Paint on existing surfaces shall completed an appropriate level of lead awareness training for the work to be performed in accordance with 1926.62.

2.83. All subcontractors whose work activities will impact lead painted substances shall submit a site specific lead compliance work plan in accordance with 1926.62 prior to the commencement of work.

2.84. All subcontractors whose work activities will impact lead painted substances shall perform personnel monitoring in accordance with 1926.62 and submit copies of results to Andersen-Colas. All personnel monitoring shall be conducted by a CIH, IH or properly trained IH technician with CIH oversight and verification of testing.

2.85. If lead based paint must be removed from any surface to allow work to continue, the lead plan must be submitted to Andersen Construction prior. Paint strippers containing methylene chloride will not be allowed unless it is the only method feasible to remove said lead based paint. Should any paint stripper containing methylene chloride be selected, subcontractor will be expected to submit their methylene chloride safety plan which should include worker training, medical surveillance, workspace air monitoring by an Industrial Hygienist, worker respiratory protection and workspace control.

2.86. All subcontractors whose work activities may impact silica containing substances must properly train and protect all affected workers, and include silca compliance work plan with site specific safety plan in accordance with 29 CFR 1926.1153.

2.87. All subcontractors whose work activities will impact silica containing substances shall perform personnel monitoring in accordance with 1926.1153 and submit copies of results to Andersen-Colas. All personnel monitoring shall be conducted by a CIH, IH or properly trained IH technician with CIH oversight and verification of testing.

2.88. All subcontractors whose work activities impact LEAD and SILICA containing substances with potential to migrate off site will conduct fenceline monitoring to verify the public is not being exposed to lead and silica or high levels of nuisance dust. (For the purposes of this requirement, high levels will be considered the NIOSH REL or OSHA PEL, whichever is lower.

2.89. This project contains various identified and potentially unidentified confined spaces. Until proven otherwise, all confined spaces shall be considered permit required confined spaces. Any subcontractor whose work activities requires worker entry into a confined space shall have and submit a written confined space work program in compliance with OAR 437-002-0146. Entry into any confined space shall not be commenced until the following submittals have been reviewed by Andersen-Colas;

2.90. Confined Space Evaluation and Testing Results

2.91. Entry into a permit required confined space requires the following (see OAR 437-002-0146(5)(b) for program requirements):

2.92. Written Confined Space Entry Program;

2.93. Site specific entry program that includes procedures of work to be completed in the space;

2.94. Entry Permit;

2.95. Worker Training;

2.96. Equipment required for safe entry;

2.97. Rescue plan;

2.98. Identified confined spaces on this project include but may not be limited to:

2.99. The crawlspace located underneath the original building*;

2.100. The tunnels connecting the old gym, new gym, library, auditorium, science building and original buildings

2.101. Manholes, Underground Storage Tanks, Boilers, Hydraulic Vehicle Hoists and underground electrical vaults

2.102. * Crawlspace – The crawlspace is a unique confined space where there is asbestos contamination. A plan for safe access and egress includes the removal of floor slab sections in strategic locations to allow for safe access and egress. All non-abatement workers with scopes of work in the crawlspace will be required to complete an 8 hour training, the cost of which is $165 per person, to cover the following topics as related to asbestos in the crawlspace:

2.103. Asbestos Awareness

2.104. PPE Requirements, including required respiratory protection

2.105. Hygiene Requirements

2.106. Entry Protocols

2.107. Crawlspace entry will require the following additional training, for which subcontractor will be responsible:

2.108. Respiratory Protection, training, medical clearances, equipment & supplies

2.109. Confined Space Entry

2.110. Crawlspace entry will require a pre-entry protocol training to be completed on site. This protocol training should take approximately one hour.

2.111. Crawlspace entry prior to the abatement of all asbestos and clearance reporting will require in addition to the above training the following PPE:

2.112. Tyvek coveralls with reinforced toes(two layers if not entry does not follow abatement change protocols)

2.113. Cut resistant gloves

2.114. ½ face air purifying respirator *see below for disturbance of soils

2.115. Safety glasses

2.116. Hard hat with chin strap

2.117. Knee pads

2.118. Helmet mounted flashlight

2.119. Radio 1 per buddy / group and 1 assigned to a supervisor or designated person not inside the crawlspace). Disturbance of soils inside the crawlspace will require a Powered Air-Purifying Respirator and the misting of the soils during any raking or shoveling.

2.120. All crawlspace entries will require a minimum of two persons.

2.121. Subcontractors with crawlspace duties on a continuous daily basis shall provide a four gas air monitor for at least one entrant to be utilized daily in accordance with the confined space entry program. This four-gas monitor should have data logging and wireless monitoring capabilities.

2.122. A competent person shall be assigned the responsibility for gas monitor maintenance.

2.123. All crawlspace entries will require compliance with the site designated check-in/check-out system.

2.124. Supported scaffolding 3 or more frames high will have either a stair tower or integral ladder frames for access. Attachable ladders more than 2 frames high will not be allowed.

2.125. Erection of supported scaffolding greater than 6' requires personal fall protection unless infeasible per manufacturer.

2.126. Supported scaffolding must have a complete guardrail system in addition to required cross braces on the non-working side. All required cross bracing to the interior (working side) shall be in place.

2.127. Supported scaffolding will have toeboards on all non-working (non building face) sides.

2.128. Supported scaffolding wrapped in any membrane to control temperature, protect work from moisture or prevent objects from falling off the non-working side shall be engineered for wind loading and required building tie-ins.

2.129. Supported scaffolding more than 2 frames immediately adjacent to any area open to the public shall incorporate debris netting.

2.130. Work on supported or suspended scaffolding immediately adjacent to an area open to the public, or supported scaffolding with workers on more than one level simultaneously will require a falling object protection plan. (the securing of materials and tools to prevent dropped objects)

2.131.

2.132.

CONSTRUCTION MANAGER/GENERAL CONTRACTOR (CM/GC) CONTRACT
between
SCHOOL DISTRICT NO. 1J, MULTNOMAH COUNTY, OREGON
(PORTLAND PUBLIC SCHOOLS)
and
ANDERSEN CONSTRUCTION COMPANY OF OREGON, LLC

Reedacted Version of Prime Agreement Excludes RFP Response

Contract No. CM/GC 68193

THIS CONTRACT SHALL BE BINDING ON DISTRICT ONLY IF IT IS SIGNED BY THE CONTRACT PROCESS MANAGER OR AUTHORIZED DESIGNEE

This Construction Manager / General Contractor ("CM/GC") Contract ("Contract") is made by and between School District No. 1J, Multnomah County, Oregon ("Portland Public Schools" or "District" or "Owner" or "District Authorized Representative") and Andersen Construction Company of Oregon, LLC ("Contractor") to provide construction services on the following Benson High School Modernization ("Project"), briefly described below:

The Project is: Benson High School Modernization

The Architect on this Project is: Bassetti Architects, P.S., P.C.

The parties agree as follows:

CONTRACTOR DATA

Contractor must submit a completed "Request for Taxpayer Identification Number and Certification" (Form W-9) with this signed Contract. Payment information will be reported to the Internal Revenue Service under the name and TIN or SSN, whichever is applicable, provided by Consultant. Contractor shall be responsible for all federal, state, and local taxes and any and all fees applicable to payments for Work under this Contract.

Full Business Name:	Andersen Construction Company of Oregon, LLC
Contractor Contact Person:	Erin Storlie
Address:	6712 North Cutter Circle
City, State, ZIP:	Portland, OR 97217
Business Telephone:	503.283.6712
Email:	estorlie@andersen-const.com
Oregon CCB License Number:	218297

Contractor certifies under penalty of perjury that Contractor is a:

☐ Sole Proprietor ☐ Corporation ☒ Limited Liability Company

☐ Partnership ☐ Other [describe: _____]

District Point of Contact: Brian Oylear (*boylear@pps.net*), Office of School Modernization, Portland Public Schools, P.O. Box 3107, Portland, Oregon 97208-3107

***All Information in this contract is subject to public records law. Please contact the District Point of Contact listed above if you have questions.**

TABLE OF CONTENTS

1. DEFINITIONS 4
2. CONTRACT DOCUMENTS 6
3. PERFORMANCE AND PAYMENT BONDS 6
4. WORK OF THE CONTRACT 6
5. RELATIONSHIP AND ROLES OF THE PARTIES 11
6. DATE OF COMMENCEMENT; SUBSTANTIAL AND FINAL COMPLETION 12
7. FEES, CONTRACT SUM AND GMP 13
8. CHANGES IN THE WORK 17
9. COST OF THE WORK (To Be Reimbursed) 18
10. COSTS EXCLUDED FROM COST OF WORK (Not To Be Reimbursed) 20
11. DISCOUNTS, REBATES AND REFUNDS 21
12. EQUITY IN PUBLIC PURCHASING & CONTRACTING POLICY 21
13. OWNER CONTROLLED INSURANCE PROGRAM 22
14. SUBCONTRACTS AND OTHER CONTRACTS 23
15. ACCOUNTING RECORDS 26
16. PROGRESS PAYMENTS 27
17. FINAL PAYMENT 28
18. TERMINATION OR SUSPENSION 29
19. REPRESENTATIONS, WARRANTIES AND CERTIFICATIONS 29
20. MISCELLANEOUS 30

ATTACHED EXHIBITS

Exhibit A - General Conditions to the Contract
Exhibit B - Scope of Pre-construction Services
Exhibit C - Allowable Cost of Work Matrix
Exhibit D – PPS RFP No. 2018-2536
Exhibit E – PPS RFP No. 2018-2536 Addendum No. 1 dated 03/06/2019
Exhibit F – PPS RFP No. 2018-2536 Addendum No. 2 dates 03/07/2019
Exhibit G – Andersen Construction Bid Response to RFP No. 2018-2538
Exhibit H - Career Learning Equity
Exhibit I - Contractor Workforce Equity
Exhibit J – OCIP Manual (under negotiations – contract will be amended once complete)
Exhibit K – OCIP Enrollment Forms (under negotiations – contract will be amended once complete)
Exhibit L – Asbestos Materials Snap Report dated February 2019
Exhibit M – Building Information Modeling Guidelines
Exhibit N – PPS Lead Based Paint Survey dated October 1996

(Incorporated by Reference)

Exhibit O – Benson Polytechnic Site Specific Educational Specification dated December 11, 2018 **(Incorporated by Reference)**
Exhibit P – Benson Polytechnic High School Master Plan Report dated December 11, 2018 **(Incorporated by Reference)**
Exhibit Q – PPS Conditional/Unconditional Waiver and Release upon Progress Payment
Exhibit R – District Milestone Schedule
Exhibit S – Sample Application for Payment

The District and CM/GC agree as set forth below:

1. DEFINITIONS

Except as expressly defined or modified below or elsewhere in this CM/GC Contract ("CM/GC Contract"), all capitalized terms shall have the meanings set forth in the General Conditions attached as Exhibit A hereto (the "General Conditions"). The terms below are expressly defined as follows:

a. **Affiliate.** Affiliate is defined in ORS 279C.332(1) and means a person that, directly or indirectly through one or more intermediaries, in controlled by or is under common control with another person.

b. **Allowances.** Allowances shall mean the allowance amounts shown in the GMP Supporting Documents, together with such further allowances as may be developed by the parties as the Project progresses.

c. **Amendment.** Amendment shall mean a written modification of the Contract (including without limitation any agreed change to the GMP), identified as an Amendment, and executed by CM/GC and the District.

d. **Business Days.** Business Days shall mean every day except Saturday, Sunday, and the legal holidays recognized for employees of Portland Public Schools.

e. **Change Order.** Change Order shall mean a written modification of the Contract under Section D.1 of the General Conditions (including without limitation any agreed change to GMP), identified as a Change Order and executed by the District and CM/GC, provided, however, that a Change Order shall not be effective to modify any price or Contract value stated in the Contract, including any Early Work Price, the Contract Sum, or the GMP, unless and until the Change Order is included in an executed Amendment to the GMP Amendment.

f. **Construction Manager/General Contractor (or "CM/GC")** means the person that provides construction manager/general contractor services to the District under a public improvement contract.

g. **Construction Manager/General Contractor Services (or "CM/GC Services")** is defined in ORS 279C.332(3) as applied in this CM/GC Contract.

h. **CM/GC Field Work.** CM/GC Field Work shall mean customary layout, clean up, supervision, and portions of the Work of a minor nature and not feasibly part of the subcontracted work due to: exclusions by the subcontractor not resolved through the process described in Section 14.c., undeveloped design owing to deviations in Work performed or materials delivered by subcontractors or suppliers that do not represent defective or nonconforming work, a breach or failure to perform by the subcontractor or supplier, complexity of coordination of the Work, and other similar reasons typically providing cause for "pick-up" or GC Work under industry standards; provided, however, that (i) the CM/GC has reasonably determined that doing such portion of the Work itself is in the best interests of District, (ii) such Work is identified as CM/GC Field Work in monthly billings and (iii) CM/GC receives prior approval from District as to the scope of such CM/GC Field Work.

i. **Construction Management ("CM") Services.** Construction Management Services shall have the meaning given in Section 4.c. below.

j. **Construction Documents.** Construction Documents are those documents that are used specifically for the construction of the Work and are a part of the Contract Documents.

k. **Construction Phase.** The Construction Phase shall mean the period commencing on the District's execution of a GMP Amendment or Early Work Amendment, together with the earlier of (i) issuance by District of a Notice to Proceed with any on-site construction or (ii) execution of a subcontract or issuance of a purchase order for materials or equipment required for the Work.

l. **Construction Phase Services.** Construction Phase Services shall mean all of the Work other than the Preconstruction phase services.

m. **Contract Documents.** Contract Documents shall have the meaning given in Section A of Exhibit A - General Conditions, as supplemented by Section 2.a. below. Interpretation of Contract documents is governed by Section A3 of Exhibit A - General Conditions.

n. **Costs for General Conditions Work.** Costs for General Conditions Work shall mean those sums paid on a cost reimbursable maximum not-to-exceed price basis as described in Section 9.h. and as identified in Exhibit C, Allowable Cost of Work Matrix.

o. **Design Development Documents.** Design Development Documents shall have the meaning given in the PPS Professional Services Agreement with the Architect for this Project.

p. **Early Work.** Early Work means construction services, construction materials and other Work authorized by Amendment that the parties agree should be performed under the CM/GC Contract in advance of the establishment of the GMP. Permissible Early Work shall be limited to early procurement of materials and supplies, early release of bid or proposal packages for site development and related activities, and any other advance Work related to critical components of the project for which performance prior to establishment of the GMP will materially affect the critical path schedule of the Project.

q. **Early Work Amendment.** Early Work Amendment shall mean an Amendment to this CM/GC Contract executed by and between the parties to authorize Early Work prior to execution of the GMP Amendment.

r. **General Conditions Work.** General Conditions Work (or "GC Work") means (i) that portion of the Work required to support construction operations that is not included within the Contractor's overhead, fee, or general expense but is called out as GC Work in Exhibit C, and (ii) any other specific categories of Work approved in writing by the District as forming a part of the GC Work.

s. **Guaranteed Maximum Price (GMP).** Guaranteed Maximum Price (GMP) is defined in ORS 279C.332(4) and means the Guaranteed Maximum Price of the Contract, as stated in dollars within the GMP Amendment, as determined in accordance with Section 7, and as it may be adjusted from time to time pursuant to the provisions of the Contract.

t. **GMP Amendment.** GMP Amendment shall mean an Amendment to the Contract, issued in the form of Exhibit I and executed by and between the parties, to establish the GMP and identify the GMP Supporting Documents for Construction Phase Services.

u. **GMP Supporting Documents.** GMP Supporting Documents shall mean the documents referenced in the GMP Amendment as the basis for establishing the GMP. The GMP Supporting Documents shall expressly identify the Plans and Specifications, schedules, assumptions, qualifications, exclusions, conditions, allowances, contingencies, unit prices, alternates and other pertinent information and documentation that form the basis for the GMP.

v. **Preconstruction Phase.** The Preconstruction Phase shall mean the period commencing on the effective date of this CM/GC Contract and ending upon commencement of the Construction Phase; provided that if the District and CM/GC agree, the Construction Phase may commence before the Preconstruction Phase is completed, in which case both phases shall proceed concurrently, subject to the terms and conditions of the Contract Documents.

w. **Preconstruction Phase Services.** Preconstruction Phase Services shall mean all services described in Section 4.a. and Exhibit B, and any similar services described in the Request for Proposals, including such similar services as are described in the CM/GC's RFP proposal to the extent they are accepted by District, but excluding any Early Work. Early Work shall be considered part of Construction Phase Services.

x. **Savings.** Savings is defined in ORS 279C.337(4) and means a positive difference between a guaranteed maximum price or other maximum price set forth in a public improvement contract and the actual cost of the work, including costs for which a contracting agency reimburses a construction manager/general contractor and fees or profits the construction manager/general contractor earns.

y. **Schematic Design Documents.** Schematic Design Documents shall have the meaning given in the PPS Professional Services Agreement with the Architect for this Project.

z. **Scope Change.** Scope Change shall mean only (i) changed site conditions not reasonably inferable from information available to CM/GC at the time of execution of the GMP Amendment, and (ii) significant Work modifications (including additions, substitutions, and deletions), application of Allowances, and selection of alternates, all as approved by the District under the Contract, beyond that identified or inferable from the GMP Supporting Documents (but in the case of Allowance items, the GMP will increase only if the cost to District of the Allowance items exceeds the total amount of the Allowances).

aa. **Subcontractor Default Insurance (SDI).** Insurance that covers costs as a result of a subcontractor that defaults on performance of their contracted work on the project, including but not limited to SDI.

2. CONTRACT DOCUMENTS

a. **Contract Documents.** District and the CM/GC agree to the terms of the Contract that are set forth in the Contract Documents. For purposes of this Project, the Contract Document identified as "Public Improvement Contract" in Exhibit A - General Conditions shall mean this CM/GC Contract. The CM/GC Contract shall include all exhibits attached hereto, which by this reference are incorporated herein, as well as any properly executed Amendments and Change Orders to this Contract.

b. **Effective Date.** The Contract (hereafter the "Contract") shall become effective on the date on which the Contract is fully executed by both parties. *No party shall perform work under this Contract before the effective date.*

c. **The Contract; Order of Precedence.** This CM/GC Contract, including all exhibits identified herein and by this reference incorporated in and made a part of this CM/GC Contract, together with the other Contract Documents, form the entire agreement between the parties. Except as expressly otherwise provided herein, the order of precedence of the Contract Documents is established in Section A.3 of Exhibit A - General Conditions, if there are inconsistent or conflicting terms among the Contract Documents.

3. PERFORMANCE AND PAYMENT BONDS

Provided no construction Work is included with the preconstruction services to be performed under the initial form of the CM/GC Contract, no performance bond or payment bond is required to be provided by the CM/GC at the time of Contract signing, consistent with ORS 279C.380. Once construction Work is included in the Contract and authorized by the District to be performed by the CM/GC, however, the CM/GC must provide a performance bond and payment bond in the full amount of any Early Work to be performed by the CM/GC, or the full amount of the GMP, fixed price or other maximum contract price, as applicable. Furthermore, in the event additional Early Work is added to the CM/GC Contract after the initial Early Work or in the event an amendment to the CM/GC Contract is made so that the GMP, fixed price or other maximum contract price must be increased, the performance bond and the payment bond must be increased in an amount equal to the additional Early Work or the increased GMP, fixed price or other maximum contract price.

4. WORK OF THE CONTRACT

a. **Preconstruction Phase Services.** The CM/GC agrees to provide all of the Preconstruction Phase Services described below and in Exhibit B on an ongoing basis in support of, and in conformance with, the time frames described in the Request for Proposals. Commencement of the Construction Phase shall not excuse CM/GC from completion of the Preconstruction Phase Services, if such services have not been fully performed at commencement of the Construction Phase. Preconstruction Phase Services shall include CM Services performed during the Preconstruction Phase.

1) The CM/GC shall provide a preliminary evaluation of the District's program and budget requirements, each in terms of the other.

2) In addition to other meetings described in this Section, the CM/GC shall participate in weekly conference calls with the Project group; attend design meetings; attend periodic meetings with the jurisdictional entities as required by the Project; participate in various meetings supportive of design effort with additional consultants and District as necessary to successfully develop Project requirements.

3) The CM/GC shall provide the following services relating to design and preconstruction tasks:

i. The CM/GC shall consult with, advise, assist, and provide recommendations to the District and the design team on all aspects of the planning and design of the Work.

ii. The CM/GC shall consult with the District and Architect and District's Authorized Representative regarding site use and improvements, and the selection of materials, building systems and equipment.

iii. The CM/GC shall provide mechanical, electrical, plumbing, and fire ("MEPF") systems verification and feedback as part of the development of the Project. Structural and Demolition verification will also be included. CM/GC feedback and/or review comments shall be tracked and distributed to District and Architect at each review phase for District and Architect response. The CM/GC will be required to engage associated expertise on the preconstruction team. This expertise shall engage in issues such as constructability, coordination, system selection verification and cost issues associated with the design and installation of MEP systems as part of the Project. The commitment of this expertise is only to be engaged during the Preconstruction Phase of the Project. This expertise can be in the form of trade contractors that are brought onto the CM/GC's Preconstruction team or they can be trade specialists within the CM/GC's organization.

iv. The CM/GC shall provide recommendations on construction feasibility; actions designed to minimize adverse effects of labor or material shortages; time requirements for procurement, installation and construction completion; and factors related to construction cost including estimates of alternative designs or materials, preliminary budgets and possible economies. CM/GC recommendations and/or review comments shall be tracked and distributed to District and Architect at each review phase for District and Architect response.

v. The CM/GC shall review in-progress design documents, including the documents generally described in the industry as Schematic Development Documents, Design Development Documents, and Construction Documents and provide input and advice on construction feasibility, alternative materials, availability, and budget feasibility. CM/GC shall review these completed Schematic Development Documents, Design Development Documents, and Construction Documents and timely suggest modifications to improve completeness and clarity. CM/GC suggestions and/or review comments shall be tracked and distributed to District and Architect at each review phase for District and Architect response.

vi. The CM/GC shall provide, through in-house expertise or by subcontracted trade specialists, Building Information Modeling ("BIM") services and clash detection during pre-construction. BIM services provided during this preconstruction phase shall be in support of the design team and building design process, and as a pre-curser to development of final shop drawings. As part of these services, the CM/GC shall provide input in the development of a BIM Execution Plan ("BEP") with members of the design team and District. The BIM model shall be developed and updated to a level of detail ("LOD") consistent with the development of the Revit model supplied by the Architect and as detailed in the BEP. The BIM model will be updated throughout the design process and be used to provide input for constructability, scheduling and estimating, and in the coordination and conflict resolution process. The BIM model will be reviewed for compliance with the BEP and Construction Operations Building Information Exchange ("COBie") standards at each applicable design phase by the District's Authorized MEPF Representative. The BIM model will utilize a version of Navisworks not older than 2013, shall be continually updated, comply with current COBie standards, and used as the basis for construction period activities. The approved Navisworks BIM model described above and all associated documentation reflecting the completed design will be delivered to the District at the conclusion of this phase.

4) The CM/GC shall provide the following services related to the Project schedule:

i. The CM/GC shall prepare, and periodically update, a preliminary Project schedule for the Architect's and District's Authorized Representative's review and the District's Authorized Representative's approval.

ii. The CM/GC shall analyze construction sequencing in order to be cost effective, to create the least amount of disruption for students, faculty, and staff in adjacent buildings, and to allow adjacent facilities to remain in operation throughout the course of construction. In addition to preparing a construction schedule, this Project shall require a site staging and logistics plan that incorporates issues such as temporary fire access and egress routes from existing buildings.

iii. The CM/GC shall coordinate and integrate the preliminary Project schedule with the services and activities of the District, Architect, and CM/GC. As design proceeds, CM/GC shall update the preliminary Project schedule to indicate proposed activity sequences and durations, milestone dates for receipt and approval of pertinent information, submittal of a GMP proposal, preparation and processing of shop drawings and samples, delivery of materials or equipment requiring long-lead time procurement, and District's occupancy requirements showing portions of the Project having occupancy priority, provided that the date(s) of Substantial Completion shall not be modified without District's prior written approval. If preliminary Project schedule updates indicate that previously approved schedules may not be met, the CM/GC shall make appropriate recommendations to the District's Authorized Representative and Architect.

iv. The CM/GC shall continuously monitor the Project schedule and recommend adjustments in the development of design documents for construction bid packages to ensure completion of the Project in the most expeditious manner possible.

5) The CM/GC shall make recommendations to Architect and District's Authorized Representative regarding the phased issuance of Plans and Specifications to facilitate phased construction of the Work, if such phased construction is appropriate for the Project, taking into consideration such factors as economics, time of performance, availability of labor and materials, and provisions for temporary facilities.

6) The CM/GC shall provide the following services relating to cost estimating:

i. CM/GC shall prepare a construction cost estimate at each of the following documentation milestones: 75% and 100% schematic design, 50% & 100% design development & 50%, and 100% construction documents.

ii. The CM/GC shall update and refine these estimates during subsequent phases in order to reflect the costs associated with changes to scope that are developed during design meetings.

(a) When Schematic Design Documents have been prepared by the Architect and approved by the District, the CM/GC shall prepare for the review of the Architect and District's Authorized Representative and approval of the District, a more detailed estimate with supporting data. Detailed estimate will be used as basis for review during a planned five day Value Engineering Workshop. During the preparation of the Design Development Documents, the CM/GC shall update and refine this estimate at appropriate intervals agreed to by the District, Architect and District's Authorized Representative and CM/GC.

(b) When Design Development Documents have been prepared by the Architect and approved by the District, the CM/GC shall prepare a detailed estimate with supporting data for review by the Architect and District's Authorized Representative and approval by the District. During the preparation of the Construction Documents, the CM/GC shall update and refine this estimate at appropriate intervals agreed to by the District, Architect and District's Authorized Representative and CM/GC.

iii. The CM/GC will participate in a planned five day Value Engineering Workshop. The workshop will be facilitated by a vendor hired by the District.

iv. If any estimate submitted to the District exceeds previously approved estimates or the District's budget, the CM/GC shall make appropriate cost saving recommendations to the Architect and District's Authorized Representative, actively participate in value engineering and scope modification work sessions at the end of schematic design and design development, and provide a formal value-engineering studies anticipated to be held at 50% Design Development and 50% Construction Documents completion.

v. CM/GC shall notify the District and the design team immediately if any construction cost estimate appears to be exceeding the construction budget.

vi. Within each estimate the CM/GC shall itemize the CM/GC's contingency to identify the amount of risk that the CM/GC would carry into the GMP at that stage of the Project due to the quality and completeness of the construction documents used to generate the estimate. This number shall be carried so that a GMP Amendment can be signed at any point during the Preconstruction Phase of the Project without a modification to the construction estimate.

vii. The CM/GC otherwise shall work with the Architect and District to develop a GMP within the target GMP range and within District's schedule.

7) The CM/GC shall perform the following services relating to subcontractors and suppliers:

i. The CM/GC shall seek to develop subcontractor and supplier interest in the Project, consistent with applicable legal requirements, and shall furnish to the District's Authorized Representative and Architect for their information a list of possible subcontractors and suppliers, including suppliers who may furnish materials or equipment fabricated to a special design, from whom competitive bids, quotes, or proposals (collectively, "Offers") will be requested for each principal portion of the Work. Submission of such list is for information and discussion purposes only and not for prequalification. The receipt of such list shall not require the District, District's Authorized Representative or Architect to investigate the qualifications of proposed subcontractors and suppliers, nor shall it waive the right of the District or Architect later to object to or reject any proposed subcontractor, supplier, or method of procurement.

ii. The CM/GC shall provide input to the District and the design team regarding current construction market bidding climate, status of key subcontract markets, and other local economic conditions. CM/GC shall determine the division of work to facilitate bidding and award of trade contracts, considering such factors as bidding climate, improving or accelerating construction completion, minimizing trade jurisdictional disputes, and related issues. CM/GC shall advise District on subcontracting opportunities for Certified Businesses.

iii. The CM/GC shall ensure subcontractors supplying content to be incorporated into the BIM model comply with the LOD standards set in the BEP, and that associated data follows current COBie standards. Subcontractors should utilize vendor supplied Revit families with associated detail whenever available. The CM/GC is ultimately responsible for delivery of a fully coordinated BIM model to the District.

8) The CM/GC shall recommend to the District's Authorized Representative and Architect a schedule for procurement of long-lead time items which will constitute part of the Work as required to meet the Project schedule, which shall be procured by the CM/GC upon execution of either a GMP Amendment or Early Work Amendment covering such procurement, and approval of such schedule by the District's Authorized Representative. The CM/GC shall expedite the delivery of long-lead time items.

9) The CM/GC shall work with the District in identifying critical elements of the Work that may require special procurement processes, such as prequalification of Offerors or alternative contracting methods.

10) The CM/GC shall Work with the District and the design team to maximize energy efficiency in the Project, including without limitation providing estimating and value engineering support to the District's analysis and application for energy related incentive programs offered by local utilities.

11) Investigative services at all campus's will be included as additional services to Preconstruction review and planning outlined above including, but not limited to: Asbuilting, testing/investigation, documentation and subcontractor supervision.

b. Construction Phase Services.

1) Upon execution of an Early Work Amendment or GMP Amendment, the CM/GC shall provide Construction Phase Services as provided in the Contract Documents, including without limitation providing and paying for all materials, tools, equipment, labor and professional and non-professional services, and performing all other acts and supplying all other things necessary to fully and properly perform and complete the Work, as required by the Contract Documents, to furnish to District a complete, fully functional Project, capable of being legally occupied and fully used for its intended purposes upon completion of the Contract (or, as to an Early Work Amendment, to furnish such Work as is described in the Early Work Amendment). Construction Phase Services shall include CM Services performed during the Construction Phase.

2) Notwithstanding any other references to Construction Phase Services in this CM/GC Contract, the Contract shall include Preconstruction Phase Services only unless (I) the parties execute a GMP Amendment or (II) the parties execute an Early Work Amendment, defined below.

3) The parties may execute one or more Early Work Amendments identifying specific Construction Phase Services that must be performed in advance of establishment of the GMP, without exceeding a not-to-exceed budget, a not-to-exceed guaranteed maximum price, or a fixed price ("Early Work Price") to be stated in such Amendment, with such Amendment including all necessary State of Oregon approvals where required. If the Early Work Price is a not-to-exceed budget, then CM/GC shall be obligated to perform the Early Work only to the extent that the Cost of Work therefore, together with the CM/GC Fee, does not exceed the Early Work Price. If CM/GC performs Early Work with a maximum not-to-exceed price or fixed price, and incurs cost in excess of that maximum not-to-exceed price or fixed price, respectively, the CM/GC shall complete the Early Work and pay such excess cost without reimbursement. If one or more Early Work Amendments are executed, the CM/GC shall diligently continue to work toward development of a GMP Amendment acceptable to District, which shall incorporate the Early Work Amendments. If District thereafter terminates the Contract prior to execution of a GMP Amendment, the provisions of Section J.5 of Exhibit A - General Conditions shall apply.

4) Prior to commencement of the Construction Phase, and in any event not later than mutual execution of the GMP Amendment, CM/GC shall provide to District a full performance bond and a payment security bond as required by Section G of Exhibit A - General Conditions in the amount of the GMP. If an Early Work Amendment is executed, CM/GC shall provide such bond in the amount of the Early Work Price under the Early Work Amendment. CM/GC shall provide to District additional or replacement bonds at the time of execution of any subsequent Early Work Amendment or GMP Amendment, in each case prior to execution of the Amendment and the supplying of any labor or materials for the prosecution of the Work covered by the Amendment, and in each case in a sufficient amount so that the total bonded sum equals or exceeds the total Early Work Price or the GMP, as the case may be. In the event of a Scope Change that increases the GMP, CM/GC shall provide to District an additional or supplemental bond in the amount of such increase prior to performance of the additional Work.

c. **Construction Management (CM) Services.** Throughout the Preconstruction Phase and Construction Phase of the Project, the CM/GC shall provide CM Services, generally consisting of coordinating and managing the building process as an independent contractor, in cooperation with the District, District's Authorized Representative, Architect and other designated Project consultants (the "Construction Principals"). CM Services shall include, but are not limited to:

1) Providing all Preconstruction Phase Services described above;

2) Developing and delivering resource loaded schedules, preparing construction estimates, performing constructability review, analyzing alternative designs, studying labor conditions, coordinating and communicating the activities of the Construction Principals throughout the Construction Phase to all Construction Principals;

3) Continuously monitoring the Project schedule and recommending adjustments to ensure completion of the Project in the most expeditious manner possible;

4) Working with the District, District's Authorized Representative, and the Architect to analyze the design, participate in decisions regarding construction materials, methods, systems, phasing, and costs, and suggest modifications to achieve the goals of providing the District with the highest quality Project within the budget, GMP and schedule;

5) Providing Value Engineering ("VE") and scope reduction services ongoing through the Project. CM/GC shall develop cost proposals, in the form of additions to or deductions from the GMP, including detailed documentation to support such adjustments and shall submit such proposals to District for its approval. CM/GC shall actively participate in one formal VE study. CM/GC acknowledges that VE services are intended to improve the value received by District with respect to cost reduction or life cycle of the Project; CM/GC will provide ongoing incremental VE review and development.

6) Holding and conducting weekly meetings with the District and the Architect to coordinate, update and ensure progress of the Work;

7) Submitting monthly written report(s) to the District's Authorized Representative during the Construction Phase. Each report shall include, but shall not be limited to, Project updates including (i) actual costs and progress for the reporting period as compared to the estimate of costs; (ii) explanations of significant variations; (iii) work completed; (iv) work in progress; (v) changes in the work; and (vi) other information as determined to be appropriate by the District. Oral or written updates shall be provided to the District as deemed appropriate by the CM/GC or as requested by the District;

8) Maintaining a daily log containing a record of weather, subcontractors working on the site, number of workers, Work accomplished, problems encountered, safety violations and incidents of personal injury and property damage, and other similar relevant data as the District may reasonably require. The log shall be available to the District and Architect on request;

9) Developing and implementing a system of cost control for the Work acceptable to District's Authorized Representative, including regular monitoring of actual costs for activities in progress and estimates for uncompleted tasks and proposed changes. The CM/GC shall identify variances between actual and estimated costs and report the variances to the District and Architect at regular intervals;

10) Developing and maintaining a quality assurance/quality control (QA/QC) plan, logging deficiencies, and documenting all corrective work.

11) Cooperating with any and all consultants hired by District, including but not limited to Geotechnical testing consultant, Energy Systems Analyst consultant, Commissioning consultant, air & water testing & balancing consultant, hazardous materials consultant;

12) At District 's request, cooperating and performing warranty and inspection Work for the Project through the expiration date of the applicable warranty period;

13) Assisting District with start-up of the Project.

14) Incorporating commissioning and inspection agents' activities into the Project schedule and coordinating subcontractors required to participate in the commissioning and inspection process;

15) Performing all other obligations and providing all other services set forth in the Contract Documents; and performing all other acts and supplying all other things necessary to fully and properly perform and complete the Work as required by the Contract.

16) The CM/GC shall have a dedicated full time BIM coordinator either on staff or through contracted expertise which will be responsible for the BIM process and to ensure the BEP requirements are met. The coordinator shall: Assemble all submitted design and construction BIMs into a single fully coordinated [and COBie compliant consolidated Navisworks BIM model]; lead the coordination and constructability process; provide a clash/issues log and matrix to track coordination issues and data gaps; document any deviations from approved CD drawings and Revit model; and continually coordinate with Architect to maintain an updated Revit model and BIM model. All work shall be coordinated with District's Authorized Representative for compliance and approval.

5. RELATIONSHIP AND ROLES OF THE PARTIES

a. **Independent Contractor.** The CM/GC is an independent contractor and not an officer, employee, or agent of District as those terms are used in ORS 30.265.

b. **Performance of Work.** The CM/CG covenants with District to cooperate with the Architect and District's Authorized Representative and utilize the CM/GC's professional skill, efforts and judgment in furthering the interests of District; to furnish efficient business administration and supervision; to furnish at all times an adequate supply of workers and materials; and to perform the Work in conformance with the terms and conditions of the Contract Documents and in an expeditious and economical manner consistent with the interests of District.

c. **Design Consultants.** District has a separate contract with the Architect related to the Project. Both the CM/GC and the Architect shall be given direction by District through District's Authorized Representative. The CM/GC agrees to support District's efforts to create a collaborative and cooperative relationship among the CM/GC, Architect, other Project consultants, and District's Authorized Representative.

d. BIM: The Architect will utilize Revit to develop a building model, which will be shared with the CM/GC for development of a fully coordinated BIM model. The Architect and CM/GC shall coordinate through the design and construction phases such that the Revit and BIM models are continually updated throughout the process. Final approved and coordinated BIM and Revit models will be provided to the District for use.

e. **Forms and Procedures.** The District has developed or may develop procedures and forms for the administration and tracking of the Contract. The CM/GC agrees to abide by those procedures and use those forms.

f. **CM/GC's Project Staff.** The CM/GC's Project staff shall consist of the following personnel:

1) Project Manager and Assistant Project Manager: **Brad Barcroft** shall be the CM/GC's Project Manager and **Ben Gengler** shall be CM/GC's Assistant Project Manager and one or both will supervise and coordinate all Construction Phase and Preconstruction Phase Services of CM/GC and participate in all meetings throughout the Project term unless otherwise directed by District. CM/GC represents that each of the Project Manager and Assistant Project Manager have authority to execute Change Orders and Contract Amendments on behalf of CM/GC.

2) Job Superintendent: If Construction Services are requested and accepted by District, **Brian Anthony** shall be the CM/GC's on-site job superintendent throughout the Project term.

g. **Key Persons.** The CM/GC's personnel identified in Section 5.f., and any other personnel identified by name in CM/GC's Proposal shall be considered Key Persons and shall not be replaced during the Project without the written permission of District, which shall not be unreasonably withheld. If the CM/GC intends to substitute personnel, a request must be given to District at least 30 Days (or such shorter period as permitted by District) prior to the intended time of substitution. When replacements have been approved by District, the CM/GC shall provide a transition period of at least 10 Business Days during which the original and replacement personnel shall be working on the Project concurrently. Once a replacement for any of these staff members is authorized, further replacement shall not occur without the written permission of District. If the project is suspended for reasons beyond the control of the CM/GC, it is understood that the CM/GC may find it necessary to reassign these Key Persons to other projects. Upon resurrection of the project, the CM/GC will make their best effort to reassemble these Key Persons to the project. If these Key Persons are not available to return to the project, substitute personnel must be approved by the District. Inability by the CM/GC to provide acceptable replacement staff can be grounds for termination of this contract.

1) Replacement staff shall be of equal or higher caliber in terms of experience and skills sets than those they are replacing.

2) In the event that Key Persons are replaced during the Project, the District shall not incur additional cost for labor rates of replacement staff compared to the originally proposed staff members. Any labor expenses in excess of those proposed for the original Key Persons shall be the financial responsibility of the CM/GC.

6. DATE OF COMMENCEMENT; SUBSTANTIAL AND FINAL COMPLETION

a. **Notice to Proceed.** If Construction Phase Services are added to the Contract as set forth in Section 4.b., then a notice to proceed will be issued by District to begin the designated or full Construction Phase Services ("Notice to Proceed"). It is anticipated that the Notice to Proceed will be issued on or about June 15, 2019. A separate Notice to Proceed shall be issued for any and every Early Work Amendment.

b. **Completion of Project.** Exact dates for Substantial Completion and Final Completion will be determined during pre-construction and established in the GMP Amendment.

c. **Time is of the Essence.** All time limits stated in the Contract Documents are of the essence.

d. **Time Extensions.** Notwithstanding provisions for Contract time extensions in Section D.2 of Exhibit A - General Conditions, District and CM/GC agree that timely completion of the Work is essential to the success of the Project, and that approval for time extension shall be granted only as a last resort. CM/GC agrees to make every effort to recover "lost" time.

e. **Failure to Achieve Substantial Completion by Final Completion Date.** In the event CM/GC fails to obtain Substantial Completion by the date set for Final Completion, subject to any time extensions granted

by the District during the Project, District reserves the right to terminate this Contract for Cause per section 18 of the Contract and Section J.4.2 of the General Conditions and pursue Liquidated Damages in accordance with section 6.g. The District may pursue any course of action deemed in the best interest of the District to complete the Project in accordance with the Contract. In addition, The District may pursue remedy and recover costs for the completion against CM/GC's performance and payment bond in accordance with the Contract.

f. **Delay in Final Completion.** District shall make payment of the balance due for any portion of the Work fully completed and accepted if Final Completion is materially delayed through no fault of Contractor or by issuance of Change Orders affecting Final Completion. In the event that Final Completion is not accomplished within sixty (60) calendar days after the date of Substantial Completion due to any fault of Contractor, Liquidated Damages will be assessed per section 6.g. The District may also withhold from the final payment 150 percent of the reasonable cost to complete the unfinished Work and to attain Final Completion. In the event Contractor fails to complete the Work necessary to attain Final Completion after sixty (60) days from Substantial Completion, District may, without waiving other remedies it may have, complete the Work and deduct the actual cost thereof.

g. **Liquidated Damages.** The CM/GC acknowledges that the District will sustain damages as a result of the CM/GC's failure to complete Work by the Interim and Contract Completion Dates in accordance with the Contract Documents. These damages may include, but are not limited to, delays in completion, use of the Project, and costs associated with Contract administration and use of temporary facilities. The CM/GC and the District acknowledge that the actual amount of damages would be difficult to determine accurately and agree that that the liquidated damages figure(s) established represent a reasonable estimate of such damages and is not a penalty.

In addition to any other remedies allowed to the District under the terms of this Contract, the CM/GC agrees to pay to the District the liquidated damage sums established for each Calendar Day of delay or any fraction thereof and further agrees that the District may deduct such sums from payments the District otherwise owes to the CM/GC under the Contract. If such deduction does not result in payment to the District of the assessed liquidated damages in full, the CM/GC shall promptly pay any and all remaining sums due to the District upon demand.

For failure to achieve Substantial Completion on the date required by this Contract, the CM/GC shall be obligated to pay liquidated damages in the amount of $9200 per calendar day. Liquidated damages for failure to meet Substantial Completion shall be assessed beginning on the day immediately following the Substantial Completion date required by this Contract and ending on the date that Substantial Completion is achieved.

For failure to achieve Final Completion on the date required by this Contract, the CM/GC shall be obligated to pay liquidated damages in the amount of $7700 per calendar day. Liquidated damages for failure to meet Final Completion shall be assessed beginning on the day immediately following the Final Completion date required by this Contract and ending on the date that Final Completion is achieved.

If Substantial Completion is achieved after the Final Completion date required by this Contract, the CM/GC shall be obligated to pay liquidated damages of both $9200 per calendar day and $7700 per calendar day (total of $16,900 per calendar day) until Substantial Completion is achieved, and thereafter $7700 per calendar day until Final Completion is achieved.

7. FEES, CONTRACT SUM AND GMP

a. **Fees; Contract Sum; GMP.** District shall pay CM/GC the Preconstruction Fee described in Section 7.b. In addition, for each Early Work Amendment executed by CM/GC and District, District shall pay CM/GC, as payment for the Early Work, an amount equal to the sum of the CM/GC Fee attributable to the Early Work, and the actual cost of all Early Work completed and accepted by District, but not exceeding the Early Work Price.

If a GMP Amendment is executed, District shall pay CM/GC, as payment for the Work, the "Contract Sum" which shall equal the sum of the Preconstruction Fee, the CM/GC Fee, the actual cost of the Work including any Early Work, but not exceeding the GMP.

The GMP shall be determined in accordance with the formula set forth below and as described in Section 7.3. The "Cost of the Work" is defined in Section 9. Costs in excess of the GMP shall be paid by the

CM/GC without reimbursement by District. Changes to the GMP shall only be authorized by Amendment that includes any necessary District approvals.

Preconstruction Fee	+	CM/GC Fee	+	Estimated Cost of the Work (Est. COW) = GMP*
Cost Reimbursement [redacted] Maximum Not-to-Exceed		[redacted]% of Est. COW		Includes CM/GC's Contingency and the Maximum Cost of Work (COW)

*Formula assumes no Early Work is performed.

b. **Preconstruction Fee.** The Preconstruction Fee shall be payable to CM/GC on a cost reimbursement basis up to a maximum not-to-exceed sum of $980,000. The Preconstruction Fee shall cover constructability review, value engineering, cost estimating, development of GMP, and all other Preconstruction Phase Services, as described in Section 4. If CM/GC's costs for provision of Preconstruction Phase Services exceed the maximum Preconstruction Fee, CM/GC shall pay such additional cost without reimbursement. CM/GC shall not be entitled to any CM/GC Fee upon the Preconstruction Fee. District shall pay the Preconstruction Fee on a cost-reimbursement basis with each application for payment during the Preconstruction Phase. If the total actual Preconstruction Fee is less than the maximum Preconstruction Fee used for initial calculation of the GMP as provided above, the GMP shall be reduced by the difference; provided that District may direct instead that any unapplied portion of the maximum Preconstruction Fee be applied to Construction Phase Services, in which case the GMP shall not be reduced by the portion so applied. Except to the extent the parties may expressly agree to the contrary in the GMP Amendment, no Preconstruction Fee or other fee, compensation or reimbursement shall be payable to CM/GC with respect to Preconstruction Services performed after execution of the GMP Amendment. If the project is suspended prior to the completion of the Pre-Construction Services period, the Contractor shall be reimbursed for their expenses to date, not to exceed total Preconstruction Fee.

c. **Establishment of CM/GC Fee; Adjustments to CM/GC Fee.**

1) The "CM/GC Fee" shall be a fixed dollar lump sum to be identified in the GMP Amendment, and shall be calculated as [redacted]% of the Estimated Cost of the Work at the time of establishment of the GMP. In making such calculation, the Estimated Cost of the Work shall exclude the Preconstruction Fee, the CM/GC Fee itself, and any other cost or charge that this CM/GC Contract states is not to be included in calculating the CM/GC Fee, but shall include Allowances, selected alternates, Contractor's Contingency, Owner's Design Contingency, and costs for General Conditions, as designated in the GMP Supporting Documents. The CM/GC Fee is inclusive of profit, overhead, and all other indirect or nonreimbursable costs. District shall pay the CM/GC Fee ratably with each application for payment during the Construction Phase. In the case of Early Work, the CM/CG Fee shall be the above percentage multiplied by the actual Cost of the Early Work, until such time as a GMP Amendment is executed, at which time such CM/GC Fee payments shall be credited against the CM/GC Fee fixed therein.

2) Notwithstanding any provision of Section D.1.3 of Exhibit A - General Conditions to the contrary, and unless the parties agree in writing to the contrary, any Amendment or Change Order that increases or decreases the GMP shall adjust the CM/GC Fee then in effect by multiplying the percentage shown in Section 7.c.1 by the change in the Estimated Cost of the Work reflected in such approved Amendment or Change Order. In addition, if the Contract is terminated for any reason prior to full completion of the Work (including, without limitation, termination during or following performance of Early Work), the CM/GC Fee shall be limited to the total CM/GC Fee multiplied by the percentage of Work completed and accepted at the time of termination. The CM/GC Fee shall not be subject to adjustment for any other reason, including, without limitation, schedule extensions or adjustments, Project delays, unanticipated costs, or unforeseen conditions.

d. **Determination of GMP.**

1) CM/GC shall deliver to District a proposed GMP and GMP Supporting Documents at a time designated by District during the Preconstruction Phase. If any actual subcontract Offers are available at the time the GMP is being established, CM/GC shall use those subcontract Offers in establishing the GMP.

2) As the Plans and Specifications may not be developed to the stage of bidddable design documents at the time the GMP proposal is prepared, the CM/GC shall provide in the GMP for further development of the Plans and Specifications by the Architect that is consistent with the Contract Documents and reasonably inferable therefrom. Such further development does not include such things as changes in scope, systems, kinds and quality of materials, finishes or equipment, all of which, if required, shall be incorporated by Change Order or Amendment with a corresponding GMP adjustment.

3) The CM/GC shall include with its GMP proposal a written statement of its basis (the "GMP Supporting Documents"), which shall include:

   i. A list of the Plans and Specifications, including all addenda thereto and the conditions of the Contract, which were used in preparation of the GMP proposal.

   ii. A list of allowances and a statement of their basis.

   iii. A detailed list of contingencies and a statement of their basis, parameters, and calculation methodology.

   iv. A list of the clarifications, qualifications, exclusions, assumptions and any other material qualifiers used by the CM/GC in the preparation of the GMP proposal to supplement the information contained in the Plans and Specifications.

   v. The proposed GMP, including a statement of the estimated cost organized by trade categories, allowances, contingency, and other items and the associated fees that comprise the GMP.

   vi. The Date of Substantial Completion upon which the proposed GMP is based, and a proposed Master Construction Schedule that includes a schedule of the Construction Documents issuance dates upon which the date of Substantial Completion is based.

4) The CM/GC shall meet with the District and Architect to review the GMP proposal and the written statement of its basis. If the District or Architect discovers any inconsistencies or inaccuracies in the information presented, they shall promptly notify the CM/GC, who shall make appropriate adjustments to the GMP proposal, its basis or both.

5) Prior to the District's acceptance of the CM/GC's GMP proposal and issuance of a Notice to Proceed, the CM/GC shall not incur any cost to be reimbursed as part of the Cost of the Work, except as specifically provided in an Early Work Amendment.

6) The District shall authorize and cause the Architect to revise the Plans and Specifications to the extent necessary to reflect the agreed-upon assumptions and clarifications contained in the GMP Amendment. Such revised Plans and Specifications shall be furnished to the CM/GC in accordance with schedules agreed to by the District, Architect and CM/GC. The CM/GC shall promptly notify the Architect and District if such revised Plans and Specifications are inconsistent with the agreed-upon assumptions and clarifications.

7) The GMP shall include in the Estimated Cost of the Work only those taxes and/or governmental fees which are enacted at the time the GMP is established.

8) The Estimated Cost of the Work shall include the CM/GC's construction contingency and an Owner design contingency. Use of the construction contingency or the Owner design contingency will be approved via the Guaranteed Maximum Price Change Amendment ("GMPCA") process in E-Builder. CM/GC will provide monthly reporting on status of the construction contingency and the Owner design contingency. The items covered by these Contingencies are described below:

CM/GC Construction Contingency Uses:

Buy-out overruns scope gaps, overruns in T&M work (such as temp conditions), mechanical, electrical, plumbing, and fire ("MEPF") routing issues (for routing that can be coordinated without impacting architectural or structural design), minor MEPF misses & conflicts, acceleration/schedule recovery (not caused by Owner or Weather Delay), overtime/trade-stacking, subcontractor parking/shuttles, Supplemental General Conditions & Staffing, trade damage (not caused by Owner's agents), costs to prevent damage or injury in emergencies, sub replacement, labor union strikes and other costs described as cost of the work.

Owner Design Contingency Uses:

Design errors/omissions, design completion not included in the Qualifications and Clarifications provided with the GMP Estimate by the CM/GC, unforeseen conditions, changed conditions, code-related changes, changes required by the AHJ, allowance overruns and savings, acceleration due to delays not caused by CM/GC, and weather delay impacts in addition to the 20 days included in the Estimate and Baseline Schedule.

Reasons for GMP Increases:

Owner design contingency overruns identified in the Allowance Exhibit included in this agreement, other Allowance use overruns/underruns (reconciliation), changes in scope/programming/material selection (increases and decreases).

9) The CM/GC shall work with the Architect and District to identify and confirm components and systems not specifically shown but required for a complete, fully functional Project. District will direct the Architect to complete the final Construction Documents in accordance with the Project scope agreed upon by all parties. The GMP will be based on the 50% CD Documents Package and associated documents listed in Attachment B, unless agreed to in writing by both parties. Development of the documents beyond 50% CD Document Package will be reviewed by the Owner and CM/GC for changes and priced for items that affect scope, and funding for such changes will be from Owner design construction contingency or Change Order to the GMP.

10) Notwithstanding the level of detail represented in the GMP Supporting Documents, the CM/GC shall represent and warrant, at the time that it submits the GMP, the GMP includes the entire cost of all components and systems required for a complete, fully functional facility.

11) In developing the GMP, the CM/GC and Owner shall include and identify Contingencies and Allowances within the GMP as may be necessary to pay for defined scope items. Unanticipated costs and unforeseen conditions that are required for a complete, fully functional facility are included as the design contingency costs.

e. **Failure to Furnish an Acceptable GMP.** If the CM/GC does not furnish a GMP acceptable to District within District's Target GMP Range, or if District determines at any time in its sole discretion that the parties may fail to reach a timely agreement on a GMP acceptable to District, District may terminate the Contract without liability, and the CM/GC shall not receive additional compensation beyond the Preconstruction Fee under the Contract and sums due under any Early Work Amendment. Termination under this provision shall proceed under Section J.5 of Exhibit A - General Conditions as a termination for District's convenience. CM/GC further agrees that District shall not be liable for any damages whether actual, consequential or otherwise for termination of the Contract under this provision.

f. **Acceptance of GMP.** Upon acceptance of the GMP by District, the parties shall execute a GMP Amendment.

g. **District Savings.** If the sum of the Preconstruction Fee, plus the CM/GC Fee, plus the actual and final Cost of the Work (the Contract Sum as defined in Section 7.a.), is less than the GMP, 100% of the savings shall accrue to the District.

h. **Allowance Work.**

1) CM/GC shall not perform any Allowance work without prior written authorization and execution by the District of a Change Order approving the Specifications for the Allowance Work and the price thereof.

2) District shall be entitled to apply any Allowance line items that have not been fully expended to other line item Allowances that have been fully expended, without any resulting increase in the GMP.

3) If the total Cost of the Allowance Work exceeds the total Allowances within the GMP, CM/GC shall not perform any Allowance Work in excess of such amount until either (i) the parties agree that the additional Allowance work will be performed within the then-current GMP or (ii) a GMP Amendment is executed to increase the GMP by the excess cost of the Allowance work.

4) The Contract Sum shall not include any Allowance items not identified in the GMP Amendment or the GMP Supporting Documents until such allowance item is reduced to a fixed price by Change Order or Amendment.

5) If at the Final Completion of the Project, any portion of the Allowance funds remains unexpended, the GMP shall be reduced by a corresponding amount via a Change Order or Amendment.

i. **Reallocating Projected Cost Underruns after Bid (Offer) Buyout.** As soon as possible after the awarding of the Work to the primary Subcontractors, CM/GC shall review projected costs and provide the District with a buy-out status report showing any projected cost underruns, reconciling accepted Offers and other reasonably anticipated costs, to the cost estimate used by CM/GC to establish the GMP. CM/GC shall include with its report any underlying documentation requested by District used to develop or support such report. Any buyout underruns or overruns will be transferred to the CM/GC's construction contingency.

8. CHANGES IN THE WORK

a. **Price Adjustments.** Adjustments to the Estimated Cost of the Work required by changes in the Work shall be determined by any of the methods listed in Section D of Exhibit A - General Conditions, except that, unless the adjustment is based upon fixed pricing or unit pricing:

1) The overhead and profit markup for the CM/GC shall be limited to the CM/GC Fee adjustment, if any, permitted under Section 7.c.2) of this CM/GC Contract;

2) The increase or decrease in the Estimated Cost of the Work, other than for subcontract work, shall be calculated pursuant to Sections 9 and 10 of this CM/GC Contract, instead of being based on CM/GC's Direct Costs as defined in Exhibit A - General Conditions; and

3) In calculating adjustments to subcontracts, unless the parties agree otherwise, the change shall be limited to the subcontractor's Direct Costs plus the supplemental mark-up provided in Section D of Exhibit A - General Conditions, and shall not be modified by Sections 9 and 10 of this CM/GC Contract.

b. **Adjustments to GMP.** Adjustments to the GMP after execution of the GMP Amendment may be made only (i) in the event of scope changes or (ii) as otherwise expressly provided in this CM/GC Contract, and then only in accordance with the following procedure:

1) CM/GC shall review subsequent iterations of the Plans and Specifications as they are prepared to determine whether, in the opinion of CM/GC, they result in a Scope Change so that it can be determined if an adjustment to the GMP is warranted.

2) Changes to the GMP shall be initiated by written notice by one party to the other via the District's project management information system "e-Builder Enterprise". CM/GC shall deliver any such request to District's Authorized Representative promptly after becoming aware of any Scope Change if, in CM/GC's opinion, it constitutes grounds for adjustment of the GMP. Any GMP Change Request shall include a fully itemized proposal as to the appropriate GMP adjustment with respect to the Scope Change at issue.

3) CM/GC shall submit its GMP Change Requests as soon as possible, and CM/GC shall not be entitled to claim a GMP increase unless CM/GC submitted a GMP Change Request to District's Authorized Representative within the earlier of (a) 30 Days after CM/GC has received the information constituting the basis for the claim, or (b) as to Work not yet bid or proposed, prior to submission of solicitations for such Work and as to Work already solicited, prior to commencement of the portion of the Work for which CM/GC intends to claim a Scope Change; and in any event, prior to CM/GC's signing of a Change Order for the Scope Change.

4) District may, at any time, submit a GMP Change Request requesting a reduction of the GMP, which shall include District's basis for such request, which may include, for example, reduction of the CM/GC's contingency after further development of the Plans and Specifications that form the basis for the original GMP Amendment, and/or unused Allowances.

5) CM/GC shall work with District's Authorized Representative to reconcile all differences in its GMP Change Request with District's Authorized Representative within seven Days from the date of submission of the GMP Change Request. "Reconciled" means that the CM/GC and District's Authorized Representative have verified that their assumptions about the various categories are the same, and that they have identified the reason for differences in the GMP Change Request and the District's Authorized Representative position. CM/GC shall submit the Reconciled GMP Change Request to District, which submission shall be a condition to any CM/GC claim for a GMP increase.

6) If the Reconciled GMP Change Request is not acceptable to District, CM/GC agrees to work with the District's Authorized Representative to provide a GMP Change Request that is acceptable to District.

7) CM/GC agrees to make all records, calculations, drawings and similar items relating to GMP Change Request available to District and to allow District's Authorized Representative access and opportunity to view such documents at CM/GC's offices. Upon District's reasonable notice, CM/GC shall deliver two copies of such documents to District at any regular meeting or at the Site.

8) GMP increases, if any, shall not exceed the increased Cost of the Work arising from the Scope Change (whether based on agreed fixed pricing, or the estimated Cost of the Work increase based on cost-reimbursable pricing), reconciled in accordance with the above provisions, as arising from the incident justifying the GMP increase, plus or minus the CM/GC Fee applicable to such change in the Cost of the Work.

9) Except as provided in this paragraph 8.b., adjustments to the GMP shall be reconciled in accordance with Section D of Exhibit A -General Conditions.

c. **Execution by District.** Notwithstanding any provision in the Contract to the contrary, Architect has no authority to execute Change Orders or Amendments on behalf of District, and only duly authorized personnel of District may do so.

d. **Continuation of Work.** CM/GC shall continue to prosecute the work in a timely and diligent manner consistent with the approved Master Construction CPM Schedule regardless of the status, outcome or other issues associated with potential Change Orders or Amendments. In no way shall CM/GC impact or allow others, such as subcontractors, to impact the Project due to pending, on-going or concluded change order negotiations. Failure to do so shall be considered a material breach of contract on the part of the CM/GC and subject to recourse by the District.

9. COST OF THE WORK (To Be Reimbursed)

a. **Cost of the Work.** The term "Cost of the Work" shall mean the following costs. The Cost of the Work shall include only those items necessarily and reasonably incurred by CM/GC as a direct result of this project, and in the proper performance of the Work and specifically identified in this Section 9, and only to the extent that they are directly related to the Project.

b. **Labor Costs.** Labor costs include:

1) Wages - stipulated rates (to be defined in the GMP Amendment) of construction workers directly employed by the CM/GC to perform the construction of the Work at the site.

2) Salaries - stipulated rates (as defined in Exhibit F) of the CM/GC's supervisory and administrative personnel (i) stationed at the site, or (ii) engaged at factories, workshops or on the road, in expediting the production or transportation of materials or equipment required for the Work with District, or otherwise engaged and off the site when specifically related to the Project, and (iii) under either clause (i) or (ii), only with District's prior written approval, and only for that portion of their time directly required for the Work.

3) Refer to Attached Labor Rates Exhibit F for supervisory, administrative and craft workers to be charged to project. Hourly Labor Rates are not subject to Audit. Wages and salaries may be adjusted for inflation annually, subject to approval by the District. Labor rates include: Workers' direct wages, fringe benefit costs paid or incurred by the CM/GC for taxes, insurance, contributions, assessments and benefits required by law or collective bargaining contracts and, for personnel not covered by such contracts, customary benefits such as medical and health benefits, and pensions, insurance, contributions.

c. Subcontract Costs.

1) Subcontractor costs include CM/GC's actual payment to subcontractors pursuant to CM/GC's contract with such subcontractor for the Work on the Project. No amount paid by or payable to any such subcontractor other than the fixed or cost reimbursement price of its subcontract shall be included in the Cost of the Work, unless otherwise approved in writing by District.

d. Costs of Materials and Equipment Incorporated in the Work or Stored On Site.

1) Costs, including transportation, of materials and equipment incorporated or to be Inoorporated in the completed Work.

2) Costs of materials in excess of those actually installed, but required to provide reasonable allowance for waste and for spoilage. Unused excess materials, if any, shall be delivered to District at the completion of the Work or, at District's option, shall be sold by the CM/GC. Any sale shall be commercially reasonable and CM/GC shall provide accounting for such a sale within fifteen (15) business days of the transaction. Net amounts realized, if any, from such sales shall be credited to District as a deduction from the Cost of the Work.

e. Costs of Miscellaneous Equipment and Other Items; Equipment Rental Charges.

1) Costs, including transportation, installation, maintenance, dismantling and removal, of materials, supplies, temporary facilities, machinery, equipment, and hand tools not customarily owned by the construction workers, which are provided by the CM/GC at the site and fully consumed in the performance of the Work; and cost less salvage value on such items if not fully consumed, whether sold to others or retained by the CM/GC; provided that District at District's option may require that CM/GC deliver to District (at no charge) at the end of the Project any of such items procured for this Project. Cost for items previously used by the CM/GC shall mean fair market value. CM/GC shall charge no additional administrative or other mark-up for purchased items. The CM/GC shall document all small tools purchased for the Project via invoices in monthly billing, and shall document the disposition of small tools which have an individual price that exceeds $500. A copy of such disposition log shall accompany the payment application whenever these items are included in the application.

2) Rental charges for temporary facilities, machinery, equipment and hand tools not customarily owned by the construction workers, which are provided by the CM/GC at the site, rented from the CM/GC will be rented at the rate indicated on annual Rental Equipment Rate Book provided by the CM/GC or its vendor providing the rentals. The maximum rental amount for equipment will be 80% of the stated value in the Equipment Rate Book. Rental rate includes minor repairs and replacements due to normal wear and tear. Small tools & equipment (under $500) are considered consumable and do not apply to rate sheet. Items not included in Equipment Rental Rate Book will be rented at a market rate, from a third party vendor, and remain owned by the third party.

3) Costs of removal of debris from the site.

4) Cost of long-distance telephone calls, communication devices, postage and parcel delivery charges, telephone service at the site and reasonable petty cash expenses of the site office, which are solely for the benefit of the Work.

5) That portion of the travel and per diem subsistence expenses of the CM/GC's personnel determined by District to be reasonable and necessary, at District approved rates, incurred while traveling in discharge of duties connected with the Work. Main office staff travel shall not be reimbursed unless approved in advance by District. These travel expenses shall be reimbursed at cost, but not exceeding the rates stated in Exhibit E. CM/GC personnel who are scheduled to work at the Project site for less than six months may receive a subsistence per diem approved by the District in accordance with Exhibit E if their place of residence is greater than 60 miles from the Project site; provided no such personnel shall be entitled to such per diem reimbursement beyond such six-month period.

f. Other Costs.

1) That portion of premiums for insurance directly attributable to the Contract, and payment and performance bonds as required by Section G of Exhibit A - General Conditions (but excluding premiums for subcontractor bonds unless authorized by District).

2) Sales tax, use tax or similar excise taxes imposed by a governmental authority which are directly related to the Work and for which the CM/GC is liable.

3) Fees and assessments for building permit(s), for other permits, for licenses, and for inspections for which the CM/GC is required by the Contract Documents to pay.

4) CM/GC's deposits lost when the loss is caused by District's fault or negligence.

5) Costs of drawings, Specifications and other documents required to complete the Work, except as provided by District or Architect.

6) Other costs incurred in the performance of the Work if and to the extent approved in advance in writing by District.

7) SDI premiums and deductible levels are to be negotiated at the time of GMP. Premiums are considered a reimbursable. Deductibles are non-reimbursable under the contract to the extent the default is not the responsibility of the Owner.

g. **Costs to Prevent Damage or Injury in Emergencies.** The Cost of the Work shall also include costs which are incurred by the CM/GC in taking action to prevent threatened damage, injury or loss in case of an emergency affecting the safety of persons and property.

h. **Costs for General Conditions Work.** CM/GC shall be paid on a cost reimbursable maximum not-to-exceed price basis as payment for the GC Work, including all labor, materials, and direct and indirect costs thereof, based on agreed upon Labor Rates & Equipment Rental Rates. The maximum not-to-exceed amount for GC Work shall be established in each Early Work Amendment or the GMP Amendment, as applicable. To the extent any GC Work is otherwise described above in this Section 9, CM/GC's compensation for the same is included in the Cost for GC Work and shall not otherwise be charged as Cost of the Work (See Exhibit C). The Cost for GC Work, less 5% retainage thereon, shall be paid monthly on a reimbursable basis over the number of months of the scheduled Construction Phase, including any period of Early Work, commencing with the first progress billing after commencement of the scheduled Construction Phase or Early Work Period. However, no adjustment in the maximum amount payable for General Conditions Work will be made if the actual construction period or Early Work period is shorter or longer than the number of months scheduled for the Construction Phase or Early Work period, unless such period is extended because of an Owner-requested delay.

10. COSTS EXCLUDED FROM COST OF WORK (Not To Be Reimbursed)

a. **Costs Excluded from Cost of Work.** The following shall not be included in the Cost of the Work:

1) Salaries and other compensation of the CM/GC's personnel stationed at the CM/GC's principal office or offices other than the site office except as included in the project fee and/or as allowed under Section s 9.b.1) and 9.b.2).

2) Expenses of the CM/GC's principal office and offices other than the site office.

3) Any overhead and general expenses, except as may be expressly included in Section 9.

4) CM/GC's capital expenses, including interest on the CM/GC's capital employed for the Work.

5) Rental cost of machinery and equipment, except as provided in Section 9.e.2).

6) Any cost associated with the Project not specifically and expressly described in Section 9.

7) Costs due to the fault or negligence of the CM/GC, subcontractors, suppliers, anyone directly or indirectly employed by any of them, or for whose acts any of them may be liable.

8) Costs due to correction of any repair work, nonconforming or defective work, or warranty work.

9) Merit, safety, or other incentive payments, bonuses or awards, or any expenses in connection therewith, except as provided in Section 9.

10) Costs associated with fines and penalties.

11) Except for Early Work, the cost of Preconstruction Phase Services.

12) The Cost of the Work for GC Work in excess of the maximum not-to-exceed cost established for GC Work.

13) Any costs in excess of the GMP.

14) Any equipment, vehicle, tool or other items the CM/GC retains ownership of beyond the Substantial Completion date of the Project.

15) Change orders that incorporate base scope of work buyout shall be in accordance with General Conditions D.1.2.

16) Costs of, and associated with, insurance deductibles.

11. DISCOUNTS, REBATES AND REFUNDS

a. **Discounts, Rebates and Refunds.** Cash discounts obtained on payments made by the CM/GC shall accrue to District. Trade discounts, rebates, refunds and net amounts received from sales of surplus materials and equipment shall accrue to District, and the CM/GC shall make provisions so that they can be secured.

b. **Amounts Credited to District.** Amounts which accrue to District in accordance with the provisions of Section 11.a. shall be credited to District as a deduction from the Cost of the Work.

12. PORTLAND PUBLIC SCHOOLS EQUITY IN PUBLIC PURCHASING & CONTRACTING POLICY

In July 2012, the PPS Board of Education passed the Portland Public Schools Equity in Public Contracting Policy, 8.50.095-P. The policy has three objectives:

Business Equity: The District will provide professional, supplier, construction and personal service purchasing and contracting opportunities to small businesses that have been historically under-utilized, including businesses owned by people of color, service-disabled veterans and women.

Contractor Workforce Equity: The District will ensure apprenticeship opportunities in the construction trades and will promote construction employment opportunities for people of color and women.

Career Learning Equity: The District will continue to provide career learning opportunities for students, providing them exposure to various potential career paths, including, but not limited to, architecture, engineering and related services, legal and accounting services, as well as building trades and construction work.

DEFINITIONS:

"Certified Business" means:

A company certified by the State of Oregon Certification Office of Business Inclusion and Diversity (COBID) as a Minority Business Enterprise (MBE), a Women Business Enterprise (WBE), business owned by Service Disabled Veteran (SDV), and/or an Emerging Small Business pursuant to Oregon Revised Statutes Chapter 200; and/or

A company certified in the States of Oregon, Washington and California by the U.S. Department of Transportation (U.S. DOT) as a Disadvantaged Business Enterprise (DBE) pursuant to Code of Federal Regulations (CFR) Title 49, Subtitle A, Parts 23 and 26; and/or

A company certified by the State of Washington Office of Minority and Women's Business Enterprises (OMWBE) as a Minority Business Enterprise (MBE) and/or Woman Business Enterprise (WBE) pursuant to Washington Administrative Code: Title 326, Chapter 326-20.

a. Business Equity

Aspirational Goals for the Participation of Certified Businesses:

The Aspirational Goal for the District is as follows: Of the total amount the District pays against the contract resulting from this Contract, 18% or more is paid to a Certified Business. Such payment may be made by the District, its prime contractors or subcontractors.

b. Certified Business Utilization Reporting

The District has implemented an online Certified Business utilization tracking system. This web-based software system facilitates Certified Business utilization reporting for all construction, architecture, engineering, and related services contractors doing business with Portland Public Schools. The system is designed to streamline and automate subcontractor utilization reporting requirements and includes the following key features:

- Automated tracking of Certified Business utilization, using the COBID database

- Online verification of subcontractor payments
- Automated communication with contractors via email regarding reporting status

Prime contractors will be required to use the online system to submit first tier subcontractor data and monthly reports on progress payments to all subcontractors. Subcontractors will be required to use the online system to verify payments received from prime contractors, identify any further tiers of subcontractors, and submit monthly reports on progress payments to their own subcontractors. Prime contractors and subcontractors must access the system at least monthly, when prompted, to manage contract information and provide the required subcontractor and payment information. Prime contractors are responsible for ensuring that all subcontractors comply with the utilization tracking requirements.

The Certified Business utilization tracking system is online at https://pps.diversitysoftware.com. Access information will be provided after contract award.

c. Career Learning Equity

The intent of this objective is to increase the numbers of young people of color and young women in career learning programs.

For contracts $100,000 and greater, the Contractor will register on the District's Career Learning database and will offer at least two (or at least four, if this Contract has a value greater than $1,000,000) of the District-specified career learning opportunities for students as described in **Exhibit G**.

d. Contractor Workforce Equity

1) Upon being awarded a District Public Improvement Contract or a District Intergovernmental Agreement for Construction or Public Improvement with a value greater than $200,000, a Contractor shall be obligated to comply with the District Contractor Workforce Equity protocols as described in **Exhibit H**. The District has contracted with the City of Portland for assistance in program administration and compliance. The Contractor Workforce Equity protocols shall apply to:
   - The prime contract; and
   - Any subcontract greater than $100,000.
2) Contractor Workforce Equity Protocols.
   - Contractor will ensure that a minimum of 20% of labor hours in each apprenticeable trade performed by the contractor and subcontractors on District projects are performed by state-registered apprentices, and
   - Contractor will utilize outreach, partnership and recruitment with workforce organizations, trade apprenticeship programs and unions to create an apprenticeship program that reflects the diversity of the Portland metropolitan area.

13. OWNER CONTROLLED INSURANCE PROGRAM

a. Portland Public Schools has implemented an OCIP for the on-site insurance requirements for the work described in this Contract (See Exhibit H). The program includes on-site coverage for the following lines of insurance for all enrolled contractors and sub-contractors:
   1) Commercial General Liability
   2) Excess Liability
   3) Contractors Pollution Liability

b. All contract prices shall EXCLUDE those costs relating to the insurance provided by the OCIP.

c. The duration of the OCIP program would be from the Contract's Notice to Proceed through final acceptance. Off-site coverage is not a part of the OCIP and contractors will be required to provide appropriate evidence of this coverage.

14. SUBCONTRACTS AND OTHER CONTRACTS

a. General Subcontracting Requirements and Business Equity Plan.

1) Other than Work performed pursuant to Section s 14.d. or 14.e. of this CM/GC Contract, CM/GC shall subcontract the Work to subcontractors other than the CM/GC and its Affiliates. If CM/GC elects to bid on any Work, CM/GC shall inform District of its intention to do so prior to the bid package release date for public bidding for that Work.

2) CM/GC shall comply with the District's Equity in Public Purchasing & Contracting Policy (EPPC Policy).

3) The CM/GC's Business Equity Plan (which is incorporated herein by reference) included with CM/GC's proposal to the Request for Proposals which resulted in this CM/GC Contract is hereby made a part of this CM/GC Contract and constitute performance obligations under this CM/GC Contract. The CM/GC shall take the actions specified in CM/GC's proposed Business Equity Plan to subcontract with Certified Businesses, including Minority Business Enterprises (MBE), Women Business Enterprises (WBE), businesses owned by Service Disabled Veterans (SDV) and/or Emerging Small Businesses (ESB), certified by the State of Oregon Certification Office of Business Inclusion and Diversity (COBID) pursuant to Oregon Revised Statutes Chapter 200; and/or

   A company certified in the States of Oregon, Washington and California by the U.S. Department of Transportation (U.S. DOT) as a Disadvantaged Business Enterprise (DBE) pursuant to Code of Federal Regulations (CFR) Title 49, Subtitle A, Parts 23 and 26; and/or

   A company certified by the State of Washington Office of Minority and Women's Business Enterprises (OMWBE) as a Minority Business Enterprise (MBE) and/or Woman Business Enterprise (WBE) pursuant to Washington Administrative Code, Title 326, Chapter 326-20.

4) The CM/GC shall report to District on the results of its Business Equity Plan and good faith efforts of compliance required in Section 14.a.3) following award of all subcontracts. The CM/GC shall also submit monthly reports to District describing its efforts under Section 14.a.3) as a part of its monthly payment application process and listing Work contracted to date with Certified Businesses. In addition to any of the other actions or remedies available to District for CM/GC's failure to comply with Section 14.a.3) or this Section 14.a.4), District may withhold any and all payments otherwise due until the required reporting has been received. District's withholding of payment shall not release CM/GC from its obligation to prosecute the work in a diligent and coordinated manner to avoid delays in the Project.

b. CM/GC's Obligations under Subcontracts.

1) No use of a subcontractor or supplier shall relieve the CM/GC of any of its obligations or liabilities under the Contract. Except as may expressly otherwise be provided in the Contract, the CM/GC shall be fully responsible and liable for the acts or omissions of all subcontractors and suppliers including persons directly or indirectly employed by them. The CM/GC shall have sole responsibility for managing and coordinating the operations of its subcontractors and suppliers, including the settlement of disputes with or between the CM/GC and any such subcontractor or supplier.

2) The CM/GC shall include in each subcontract and require each subcontractor to include in any lower tier subcontract, all provisions necessary to make all of the provisions of the Contract Documents, including Exhibit A - General Conditions, fully effective as applied to subcontractors. CM/GC shall indemnify District for any additional cost based on a subcontractor claim which results from the failure of CM/GC to incorporate the provisions of this CM/GC Contract in each subcontract. The CM/GC shall provide all necessary Plans, Specifications, and Instructions to its suppliers and subcontractors to enable them to properly perform their work.

3) **Retainage from Subcontractors.** Except with the District's prior approval, payments to subcontractors shall be subject to retainage of no more than 5%. The District and the CM/GC shall agree upon a mutually acceptable procedure for review and approval of payments and retainage for subcontractors.

4) CM/GC will provide the District's Authorized Representative with a list of subcontractors it has under contract with each invoice submittal and notify the Representative of any changes from the previous list.

c. **Subcontractor Selection.**

1) Unless otherwise provided under this Section 14, the selection of all subcontractors and suppliers shall be made by competitive Offers in a manner that will not encourage favoritism or substantially diminish competition. Absent a written justification prepared by the CM/GC and approved by the District as more particularly provided for in this section, the CM/GC's subcontractor selection process must be "competitive", meaning that the process should include publicly-advertised subcontractor solicitations and be based on a low-bid competitive method, a low-quote competitive method for contracts less than $100k dollars, or a method whereby both price and qualifications of the subcontractors are evaluated in a competitive environment;

2) CM/GC shall submit to District's Authorized Representative its proposed procurement documents for review and comment before they are issued for solicitation. CM/GC shall consider and respond to all District comments regarding any proposed Offer packages. As Offers are received, CM/GC shall submit to the District an Offer comparison in a mutually agreeable form together with any specific back-up documentation requested by District. The competitive process used to award subcontracts by the CM/GC may be monitored by the District's Authorized Representative; provided that such monitoring shall not excuse CM/GC from compliance with the subcontracting requirements of this CM/GC Contract. CM/GC shall cooperate in all respects with District's monitoring. The District's Authorized Representative shall be advised in advance of and be given the opportunity to be present at bid openings, and CM/GC shall provide him or her with a summary or abstract of all bids in form acceptable to the District's Authorized Representative, and copies of particular bids if requested, prior to CM/GC's selection of bids. Prior to opening bids, the CM/GC agrees to disclose in writing to District any financial interest it has in any such subcontractor, supplier or other contracting party whenever such subcontractor, supplier or contracting party intends to compete on any Project work, directly or indirectly, including whether such party is an Affiliate of CM/GC.

3) The following minimum requirements apply to the Subcontract solicitation process:

i. Solicitations shall be advertised at least ten (10) business days prior to opening in the Daily Journal of Commerce and at least one other newspaper specifically targeted to reach the Certified Business audience. CM/GC also agrees to advertise in a local community newspaper in the area in which the Project is located, in order to allow for local participation in the solicitation process.

ii. Unless specific other prior arrangement has been made with District, all bids/quotes/proposals will be written, and submitted to a specific location at a specific time. CM/GC shall time/date-stamp all bids/quotes/proposals as received. Subcontractors must be qualified to perform the Work for this Project by being appropriately registered with the State of Oregon Construction Contractors Board.

iii. If fewer than three (3) bids/quotes/proposals are submitted in response to any solicitation (inclusive of any bid submitted by CM/GC), prior written approval by District shall be required to accept a bid.

iv. CM/GC may develop and implement a prequalification process in accordance with Oregon Revised Statutes for competitive bidding for particular solicitations, followed by selection of successful bids among those bidders that CM/GC determines meet the prequalification standards, with District's prior written approval of such prequalification process.

v. The CM/GC shall comply, and require subcontractor compliance, with the State of Oregon Bureau of Labor & Industries prevailing wage rate requirements. The wage rates that apply to this Project are described in Section C.1. of Exhibit A - General Conditions.

vi. District may at its sole discretion, require CM/GC to re-solicit for bids/quotes/proposals based on the same or modified documents.

vii. CM/GC and the District, at its' discretion, shall review all bids/quotes/proposals and shall work with bidders to clarify bids, reduce exclusions, verify scope and quantities, and seek to minimize work subsequently awarded via the Change Order process.

viii. The CM/GC shall document any and all discussions, questions and answers, modifications and responses to from any bidder and ensure that the same are distributed to all bidders, and District shall be entitled to inspect such documentation on request.

ix. If using the low-bid or low-quote competitive method, CM/GC shall determine the lowest responsive and responsible bid/quote for each solicitation that meets CM/GC's reasonable

performance standards for the components of the Work at Issue; provided that if CM/GC determines it is unable to execute a suitable subcontract with such bidder, CM/GC may, with District's prior approval, execute a subcontract with the second-lowest Offeror pursuant to Section 14.c.4) below.

4) When the subcontractor selection process for a particular Work package will not be "competitive" as provided for in this section, the process must meet the following requirements:

   i. The CM/GC must prepare and submit a written justification to the District, explaining the project circumstances that support a non-competitive subcontractor selection process for a particular Work package, including, but not limited to, Emergency circumstances, the CM/GC's need to utilize a key subcontractor member of the CM/GC's project team consistent with the CM/GC's project proposal, the need to meet other specified Contract requirements, the continuation or expansion of an existing subcontractor agreement that was awarded through a "competitive process" along with facts supporting the continuation or expansion of the subcontractor agreement, or a "sole source" justification;

   ii. For a "sole source" selection of a subcontractor to proceed, the District must evaluate the written justification provided by the CM/GC and must find that critical project efficiencies require utilization of labor, services or materials from one subcontractor; that technical compatibility issues on the project require labor, services or materials from one subcontractor; that particular labor, services or materials are needed as part of an experimental or pilot project or as part of an experimental or pilot aspect of the project; or that other project circumstances exist to support the conclusion that the labor, services or materials are available from only one subcontractor;

   iii. The CM/GC must provide an independent cost estimate for the Work package that will be subject to the non-competitive process, if required by the District;

   iv. The CM/GC must fully respond to any questions or comments submitted to the CM/GC by the District; and

   v. The District must approve the CM/GC's use of the non-competitive subcontractor selection process prior to the CM/GC's pursuit of the non-competitive process.

5) CM/GC shall notify District in writing in advance before award of any proposed subcontract, which notice shall include summaries in a form acceptable to District of all bidders received for the Subcontract at issue. District reserves the right to disapprove any proposed subcontractors, suppliers and Subcontract or supply contract awards, based on legal standards of responsibility. District shall not unreasonably disapprove any proposed subcontractor or supplier and increased costs due to District's disapproval shall be cause for an increase in the GMP. Notification shall be made with suitable time for review and comment/approval by the District before issuance of the Subcontract for execution. The District will notify the CM/GC of any non-approval within 7 calendar days of submitted package.

6) CM/GC's subcontracting records shall not be considered public records; provided, however, that District and other agencies of the State shall retain the right to inspect, audit and monitor the subcontracting process in order to protect the District's interests.

7) **Change of Subcontractors.** Once a subcontract has been accepted by the District and executed by the CM/GC and subcontractor, CM/GC shall not terminate or substitute the subcontractor without prior written approval of the District. In the event a change to the subcontract assignment is made, CM/GC shall initiate a new bid package consistent with this CM/GC Contract to procure a new subcontractor, unless otherwise approved by the District in writing.

d. CM/GC Field Work.

1) The CM/GC or its Affiliate(s) may provide CM/GC Field Work required to complete the Project with its own forces, without the necessity of subcontracting such work.

2) Except as provided in Section 14.d.1), any other portion of the Work proposed to be performed by CM/GC or any Affiliate, including without limitation provision of any materials, equipment, or supplies, shall be subject to the provisions of Section 14.e.

e. Subcontracting by CM/GC.

1) Authorization: The CM/GC or an Affiliate or subsidiary of the CM/GC may perform or compete with other prospective subcontractors to perform work under this Contract as provided in this section.

2) CM/GC Self-Performance or Performance by CM/GC Affiliates or Subsidiaries With Competition. If the CM/GC or an Affiliate or subsidiary of the CM/GC will be included in the subcontractor selection process to perform particular construction Work on the project, the CM/GC must disclose that fact in the selection process documents and announcements. The District must review and approve the conditions, processes and procedures the CM/GC will utilize in that competitive process in order to make the process impartial, competitive and fair. The District will monitor the selection process.

3) CM/GC Self-Performance or Performance by CM/GC Affiliates or Subsidiaries Without Competition. Other than for GC Work, in order for the CM/GC or an Affiliate or subsidiary of the CM/GC to perform elements of the construction Work without competition from subcontractors, the CM/GC must provide a detailed proposal for performance of the Work by the CM/GC or an Affiliate or subsidiary of the CM/GC. If required by the District, the CM/GC's proposal to perform the construction Work must be supported by at least one independent cost estimate prior to the Work being included in the Contract.

4) When subcontracting work is performed by CM/GC, the estimate shall be verified by a 3rd party estimate, and shall be reviewed and approved by the District. Once approved, the cost of work shall be based on GMP pricing format, with a separate schedule of values, and sufficient documentation to validate cost of work. Monthly invoices will be paid based on percentage complete, and reconciled with actual costs on a quarterly basis.

f. **Unsuccessful Subcontractor Briefing.** Briefing is designed to allow a subcontractor who was not selected by the CM/GC to perform a particular element of the construction Work to obtain specific information from the CM/GC, and meet with the CM/GC to discuss the subcontractor qualification and selection process involved and the CM/GC's subcontractor selection decisions, in order to better understand why the subcontractor was not successful in being selected to perform the particular element of the Work and to improve the subcontractor's substantive qualifications or the subcontractor's methods in competing for elements of the Work for the particular project involved, or for future projects. The briefing meetings may be held with individual subcontractors or, if the subcontractors agree, in groups of subcontractors, with those groups established by bid package or other designation agreed to by the District and the CM/GC. Nevertheless, the CM/GC is not obligated to provide this briefing opportunity unless the CM/GC receives a written request from a subcontractor to discuss the subcontractor qualification and selection process involved. Unless the District and the CM/GC agree on a different schedule, the CM/GC Contract should include provisions:

1) Allowing a subcontractor 60 days from the CM/GC's notice of award of a subcontract for a particular Work package to request, in writing, a post-selection meeting with the CM/GC under this section; and

2) Requiring the CM/GC to set a meeting with the subcontractor under this section within 45 days of the subcontractor's written request.

g. **Protests.** CM/GC, acting as an independent contractor, shall include in the competitive process to award all subcontracts, a protest process for subcontractors and suppliers that are competing Offerors, which process shall be subject to approval by District. CM/GC shall be solely responsible for resolving the procurement protests of subcontractors and suppliers. CM/GC shall indemnify, defend, protect and hold harmless District from and against any such procurement protests and resulting claims or litigation. CM/GC shall act as an independent contractor, and not an agent of District, in connection with any procurement protest. The provisions of this Section 14 are solely for the benefit of District, and do not grant any rights or remedies (including third party beneficiary rights) to any Offeror or other protester, in connection with any procurement protest or claim.

15. ACCOUNTING RECORDS

a. **Accounting; Access to Project Records.** The *CM/GC* shall keep full and detailed accounts and exercise such controls as may be necessary for proper financial management under the Contract; the accounting and control systems shall be satisfactory to District. District and District's representatives shall be afforded reasonable and regular access to the CM/GC's records, books, correspondence, instructions, drawings, receipts, subcontracts, purchase orders, vouchers, memoranda, and access to reports generated in Excel and PDF formats by the CM/GC's control software, and other data relating to the Contract, and the *CM/GC* shall preserve these for a period of three years after final payment, or for such longer period as may be required by law.

b. **Periodic and Final Audits.** District may, at its discretion, perform periodic audits of the Cost of the Work and any other reimbursable costs associated with the Project. District intends to conduct a final audit of reimbursable costs prior to the Contract closeout and final payment application approval. The CM/GC shall cooperate fully with District in the performance of such audits. Disputes over audit findings or conclusions shall be subject to the process set forth in Section 17.d.

16. PROGRESS PAYMENTS

a. **Integration with General Conditions.** The requirements of this Section 16 and Section 17 are in addition to, and not in lieu of, the requirements of Section E of Exhibit A - General Conditions. In the event of conflict between the provisions of Sections 16 and 17 and Section E, the provision more favorable to District shall control. Without limitation, the provisions of Section s 16.c. and 16.d. shall control over the corresponding provisions of Section E.2.5 of the General Conditions.

b. **Progress Payments.** Based upon applications for payment submitted pursuant to Section E of the General Conditions, District shall make progress payments on account of the Preconstruction Fee, Cost of the Work, and associated CM/GC Fee, less 5% retainage, to the CM/GC as provided below and elsewhere in the Contract Documents; however, no retainage will be withheld for Preconstruction Services. A progress payment shall not be considered acceptance or approval of any Work or waiver of any defects therein. All progress payment requests shall include the forms designated or approved by the District stating that all of the Contractor's obligations to date relating to the Work have been paid. Reference Exhibit E, Conditional and Unconditional Waiver and Release forms.

c. **Percentage of Completion.** Applications for payment shall show the percentage of completion of each portion of the Work as of the end of the period covered by the application for payment. The percentage of completion shall be the lesser of (I) the percentage of that portion of the Work which has actually been completed; or (II) the percentage obtained by dividing (a) the expense that has actually been incurred by the CM/GC on account of that portion of the Work for which the CM/GC has made or intends to make actual payment prior to the next application for payment by (b) the share of the GMP allocated to that portion of the Work in the Schedule of Values.

d. **Calculation of Payment.** Subject to other provisions of the Contract Documents, the amount of each progress payment shall be computed as follows:

1) Timeliness of Payments: Undisputed payment owed shall be paid by Owner within Thirty (30) days of receipt of a payment request which meets the requirements of this article.

i. Pre-Construction Phase:

(a) The Preconstruction Fee will be billed on a cost reimbursement basis submitted monthly. Provide backup for each payment application that includes breakdown of labor hours, materials, etc. to justify reimbursement being requested.

(b) These billings will not be subject to retainage described in the General Conditions.

(c) If upon execution of an Early Work Amendment, the Preconstruction Services are not complete, the Contractor is to submit separate payment applications for pre-Construction Phase Services and Construction Phase Services.

ii. Construction Phase

(a) Take that portion of the GMP properly allocable to completed Work as determined by multiplying the percentage of completion of each portion of the Work under the Schedule of Values by the share of the GMP allocated to that portion of the Work in the Schedule of Values. Pending final determination of cost to the District of changes in the Work, amounts not in dispute shall be included;

(b) Add that portion of the GMP properly allocable to materials and equipment delivered and suitably stored and otherwise in compliance with Section E.2.3 of the General Conditions;

(c) With respect to Change Order Work, add markups as allowed by Section D of the General Conditions;

(d) Add the CM/GC's Fee. The portion of the CM/GC's Fee payable shall be an amount that bears the same ratio to CM/GC Fee as sum of the amounts in the three preceding Clauses bears to the estimated probable Cost of the Work described in Section 7.a., but in no event causing total CM/GC Fee payments to exceed the total CM/GC Fee;

(e) Subtract the aggregate of previous payments made by and retained by the District;

(f) Subtract the shortfall, if any, indicated by the documentation required to substantiate prior applications for payment, or resulting from errors subsequently discovered by the District in such documentation;

(g) Subtract any amounts for which the District's Authorized Representative has withheld or denied payment as provided in the Contract Documents; and

(h) Subtract 5% retainage on the entire progress payment.

17. FINAL PAYMENT

a. **Final Payment Accounting.** CM/GC shall submit to District a final detailed accounting of the Cost of the Work together with CM/GC's final application for payment.

b. **Calculation of Final Payment.** The amount of the final payment shall be calculated as follows:

1) Take the sum of the CM/GC Fee, plus the Preconstruction Fee, plus the actual Cost of the Work substantiated by the CM/GC's final accounting. Said sum shall not exceed the GMP.

2) Subtract amounts, if any, for which the District's Authorized Representative withholds, in whole or in part, approval of payment.

3) Subtract the aggregate of previous payments made by District to CM/GC. If the aggregate of previous payments made by District exceeds the amount due the CM/GC, the CM/GC shall reimburse the difference to District within 30 Days with interest at the rate applicable to District payments under the General Conditions.

c. **Final Payment Review.** District or its accountants will review and report in writing on the CM/GC's final accounting within 30 Days after delivery of the final accounting by the CM/GC. Based upon such Cost of the Work as District or District 's accountants report to be substantiated by the CM/GC's final accounting, and provided the other conditions of the Contract have been met, the District's Authorized Representative will, within 10 Days after receipt of the written report of District 's accountants, either issue to District an approval of CM/GC's final application for payment with a copy to the CM/GC or notify the CM/GC and District in writing of the District's Authorized Representative's reasons for withholding approval of any part of the application for payment, which disapproval shall include District's Authorized Representative's estimate of the amount that is due the CM/GC under the application for payment.

d. **Payment Disputes.** If District's accountants report the Cost of the Work as substantiated by the CM/GC's final accounting to be less than claimed by the CM/GC or if District's Authorized Representative declines to approve any duly submitted payment request by CM/GC, the CM/GC shall be entitled to demand a review by the District's highest contracting authority of the disputed amount. Such demand shall be made by the CM/GC within 30 Days after the CM/GC's receipt of a copy of the rejection of the application for payment; failure to demand additional review within this 30-Day period shall result in the substantiated amount reported by District's accountants becoming binding on the CM/GC. In addition, if District performs a subsequent audit of the Cost of the Work and determines any item therein to have been unsubstantiated or that CM/GC was otherwise overpaid, CM/GC shall have 30 Days after delivery of request for reimbursement by District to demand additional review by District's highest contracting authority; failure to make such demand within this 30 Day period shall result in the requested reimbursement becoming unconditionally due and payable by CM/GC. If CM/GC timely submits a protest, CM/GC's Claim shall be subject to the claims review process in Section D.3 of the General Conditions. Pending a final resolution, District shall pay the CM/GC the amount of the application for payment approved by the District's Authorized Representative.

e. **Effect of Payment.** Neither approval of an application for payment, a progress payment, release of retainage, final payment, or partial or entire use or occupancy of the Project by the District shall constitute acceptance of work not conforming to the Contract Documents, or waiver of the right to assert overpayment.

18. TERMINATION OR SUSPENSION

a. **District's Right to Terminate Prior to Execution of GMP Amendment.** Prior to execution by both parties of the GMP Amendment, the District may terminate the Contract at any time without cause. Upon such termination, the amount to be paid to the CM/GC shall not exceed the Preconstruction Fee payable to the date of termination, together with amounts payable for Early Work if an Early Work Amendment has been executed. If District terminates for convenience during the Preconstruction Phase, District shall be entitled to copies of, and shall have the right to use, all work products of CM/GC and its subcontractors performed to the date of termination, and CM/GC shall deliver copies of the same to District on request.

b. **District's Termination for Convenience after GMP Amendment.** After the GMP Amendment is executed by both parties, the Contract may be terminated by District without penalty for convenience pursuant to Section J.5 of the General Conditions in which case CM/GC shall be entitled to payment of the amount stated in Section 19.a., together with the actual Cost of the Work completed, plus the CM/GC's Fee prorated based on the actual Cost of the Work completed prior to the date of termination, but in any event not in excess of the GMP.

c. **District's Termination for Cause.** In the event of termination of this CM/GC Contract by District for cause pursuant to Section J.4 of the General Conditions, the amount, if any, to be paid to the CM/GC after application of the General Conditions and District's rights at law shall not exceed the amount the CM/GC would be entitled to receive under Section 19.b.

d. **CM/GC Termination for Cause.** CM/GC acknowledges that disputes regarding payments and Change Orders may occur as part of the CM/GC process, and that District's declining to pay disputed amounts shall not be grounds for suspension of the Work or termination for cause by CM/GC. If CM/GC terminates the Contract for District's material breach, the amount to be paid to CM/GC shall not exceed the amount CM/GC would have been entitled to receive under Section 17 above through termination and demobilization from the Project, with the CM/GC Fee prorated based on the actual Cost of the Work through the date of termination.

e. **Assignment of Subcontracts.** Each subcontract and supply contract for any portion of the Work is hereby irrevocably assigned by the CM/GC to the District, provided that such assignment is effective only after termination of the Contract by the District, and only for those subcontracts and supply contracts which the District accepts by notifying the subcontractor/supplier and CM/GC in writing. For those subcontracts and supply contracts accepted by District, if the Work has been suspended for more than thirty (30) business days, the subcontractor's/supplier's compensation shall be equitably adjusted for increases in cost resulting from the suspension. CM/GC shall include a provision in each subcontract and supply agreement whereby the subcontractor/supplier acknowledges District's rights under this Section 18.e. With respect to any subcontracts/supply contracts that are not accepted by District, the provisions of Section J.6.1 of the General Conditions shall apply.

19. REPRESENTATIONS, WARRANTIES AND CERTIFICATIONS

a. **Representations and Warranties.** CM/GC represents and warrants to District as of the effective date of the Contract:

1) it is qualified to do business as a licensed general contractor under the laws of the State of Oregon, and has all requisite corporate power and corporate authority to carry on its business as now being conducted;

2) It has full corporate power and corporate authority to enter into and perform the Contract and to consummate the transactions contemplated hereby; CM/GC has duly and validly executed and delivered this CM/GC Contract to District and that the Contract constitutes the legal, valid and binding obligation of CM/GC, enforceable against CM/GC in accordance with its terms, except as enforceability may be limited or affected by applicable bankruptcy, insolvency, reorganization, moratorium or other similar laws affecting creditors' rights generally and by general principles of equity (regardless of whether enforceability is considered in a proceeding in equity or at law);

3) CM/GC's execution and delivery of this CM/GC Contract and the consummation of the transactions contemplated hereby will not conflict with or result in a material breach of any terms or provisions of, or constitute a material default under, (i) CM/GC's Articles of Incorporation or Bylaws; (ii) any note, bond, mortgage, indenture, license, lease, contract, commitment, agreement or other instrument or obligation to which CM/GC is a party or by which CM/GC may be bound; or (iii) any statute, order, writ, injunction, decree, rule or regulation applicable to CM/GC;

4) no material consent, approval, authorization, declaration or other order of, or registration or filing with, any court or regulatory authority or any third person is required for the valid execution, delivery and performance of the Contract by CM/GC or its consummation of the transactions contemplated hereby;

5) there is no action, proceeding, suit, investigation or inquiry pending that questions the validity of the Contract or that would prevent or hinder the consummation of the transactions contemplated hereby; and

6) the CM/GC's Project Manager and Assistant Project Manager identified in Section 4 are duly appointed representatives and each has the authority to bind the CM/GC to any and all duties, obligations and liabilities under the Contract Documents and any Amendments thereto.

b. Tax Compliance Certification.

By signature on this CM/GC Contract, the undersigned hereby certifies under penalty of perjury that the undersigned is authorized to act on behalf of CM/GC and that CM/GC is, to the best of the undersigned's knowledge, not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 401.792 to 401.816 and ORS chapters 118, 314, 316, 317, 318, 320, 321 and 323; the elderly rental assistance program under ORS 310.630 to 310.706, and local taxes administered by the Department of Revenue under ORS 305.620.

20. NON-DISCRIMINATION CLAUSE

Both parties agree that no person shall be subject to unlawful discrimination based on race; national or ethnic origin; color; sex; religion; age; sexual orientation; gender expression or identity; pregnancy; marital status; familial status; economic status or source of income; mental or physical disability or perceived disability; or military service in programs, activities, services, benefits, or employment in connection with this contract. The parties further agree not to discriminate in their employment or personnel policies.

21. MISCELLANEOUS

a. Headings. The headings used in this CM/GC Contract are solely for convenience of reference, are not part of the Contract and are not to be considered in construing or interpreting the Contract.

b. Merger. The Contract Documents constitute the entire contract between the parties. No waiver, consent, modification or change of terms of the Contract shall bind either party unless in writing and signed by both parties. Such waiver, consent, modification or change, if made, shall be effective only in the specific instance and for the specific purpose given. There are no understandings, agreements, or representations, oral or written, not specified herein regarding the Contract. CM/GC, by signature of its representative, hereby acknowledges that it has read the Contract, understands it and agrees to be bound by its terms and conditions.

c. Exemption from Competitive Bidding. The parties acknowledge that the Contract has been awarded under an exemption from competitive bidding requirements pursuant to ORS 279C.335, as authorized by the PPS Board of Education.

d. Foreign Contractor. The CM/GC shall be domiciled in or registered to do business in the State of Oregon. If the CM/GC is not domiciled in or registered to do business in the State of Oregon, CM/GC shall promptly provide to the Oregon Department of Revenue and the Secretary of State Corporation Division all information required by those agencies, or other regulatory bodies, relative to the resultant Contract. CM/GC shall maintain its legal capacity to perform the services set forth under the Contract.

e. Recyclable Products. The CM/GC shall use recyclable products to the maximum extent economically feasible in the performance of the Contract Work set forth in this document.

f. Reporting. The following reports shall be provided to the District on a monthly basis:

1) A comparison of actual progress with the estimated progress for such point in time stated in the resource loaded master construction schedule

2) A comparison of costs-to-date to budget for each major element of contractually specified project cost

3) A complete log of allowances showing original balance, amount used, and forecasted amount yet to be used.

4) A complete change order log

5) A summary of project scheduling and milestone achievements. Include summary of key activities and potential risk items for achieving schedule for the next 60 days.

6) Safety update

7) Subcontractor concerns, claims, and issues

8) Status of compliance with local ordinances and state and federal laws or regulations applicable to performance of the Work and identified by the parties to be addressed in the Progress Report form

9) General overview of status of the Project

Contractor has the power and authority to enter into and perform this Contract. The persons executing this Contract on behalf of Contractor have the actual authority to bind Contractor to the terms of this Contract.

CM/GC

Andersen Construction Company of Oregon, LLC

Signature

Brian Knudsen, Regional Vice President, Oregon

Printed Name and Title

June 20th, 2019

Date

DISTRICT

School District No. 1J,
Multnomah County, Oregon

Cynthia Le
Chief Financial Officer

Date 7-3-2019

PAYMENT METHOD: The District's preferred method of payment is by electronic payment (ePayables), a form of credit card payment. Upon invoice approval, a credit card account number will be provided to you which will allow you to access the funds as a credit card payment. Any fees charged by your credit card processor are your sole responsibility.

An electronic payment can reduce processing time and administrative overhead costs for both parties, resulting in expedited payment upon invoice approval, and reduces exposure to check fraud. The District will not pay convenience fees, surcharges, or any additional costs for payments made by electronic payment.

If you are willing and able to accept payment via credit card as noted above, please check yes.

☐ YES ☒ NO

If "yes" checked: Unless otherwise specified, ePayables information will be sent to the email address on the first page of this contract. To send ePayables information to an alternate address, please note it here:

_____.

EXHIBIT A

PORTLAND PUBLIC SCHOOLS

GENERAL CONDITIONS FOR CM/GC CONTRACTS

GENERAL CONDITIONS FOR CONSTRUCTION MANAGER/GENERAL CONTRACTOR

TABLE OF SECTIONS

SECTION A
GENERAL PROVISIONS

A.1 DEFINITION OF TERMS
A.2 SCOPE OF WORK
A.3 INTERPRETATION OF CONTRACT DOCUMENTS
A.4 EXAMINATION OF PLANS, SPECIFICATIONS, AND SITE
A.S INDEPENDENT CONTRACTOR STATUS
A.6 RETIREMENT SYSTEM STATUS AND TAXES
A.7 GOVERNMENT EMPLOYMENT STATUS

SECTION B *ADMINISTRATION OF THE CONTRACT*

B.1 DISTRICT'S ADMINISTRATION OF THE CONTRACT
B.2 CM/GC'S MEANS AND METHODS
B.3 MATERIALS AND WORKMANSHIP
B.4 PERMITS
B.S COMPLIANCE WITH GOVERNMENT LAWS AND REGULATIONS
B.6 SUPERINTENDENCE/PROJECT MANAGEMENT
B.7 INSPECTION
B.8 SEVERABILITY
B.9 ACCESS TO RECORDS
B.10 WAIVER
B.11 SUBCONTRACTS AND ASSIGNMENT
B.12 SUCCESSORS IN INTEREST
B.13 DISTRICT'S RIGHT TO DO WORK
B.14 OTHER CONTRACTS
B.15 GOVERNING LAW
B.16 LITIGATION
B.17 ALLOWANCES
B.18 SUBMITTALS, SHOP DRAWINGS, PRODUCT DATA AND SAMPLES
B.19 SUBSTITUTIONS
B.20 USE OF PLANS AND SPECIFICATIONS
B.21 FUNDS AVAILABLE AND AUTHORIZED
B.22 NO THIRD PARTY BENEFICIARIES
B.23 RULES REGARDING CONTACT WITH THE PRESS AND PUBLICATIONS

SECTION C
WAGES AND LABOR

C.1 PREVAILING WAGES RATES ON PUBLIC WORKS
C.2 PAYROLL CERTIFICATION; ADDITIONAL RETAINAGE; FEE REQUIREMENTS
C.3 PROMPT PAYMENT AND CONTRACT CONDITIONS
C.4 PAYMENT FOR MEDICAL CARE
C.5 HOURS OF LABOR
C.6 PAY EQUITY; EMPLOYEE DISCUSSIONS OF RATE OF PAY OR BENEFITS

SECTION D CHANGES IN THE WORK

D.1 CHANGES IN THE WORK
D.2 DELAYS
D.3 CLAIMS REVIEW PROCESS

SECTION E
PAYMENTS

E.1 SCHEDULE OF VALUES
E.2 APPLICATIONS FOR PAYMENT
E.3 PAYROLL CERTIFICATION REQUIREMENT
E.4 RESERVED
E.S RETAINAGE
E.6 FINAL PAYMENT

SECTION F
JOB SITE CONDITIONS

F.1 USE OF PREMISES
F.2 PROTECTION OF WORKERS, PROPERTY AND THE PUBLIC
F.3 CUTTING AND PATCHING
F.4 CLEANING UP
F.5 ENVIRONMENTAL CONTAMINATION
F.6 ENVIRONMENTAL CLEAN-UP
F.7 SECURITY AND SCHOOL SITE BEHAVIOR
F.8 FORCE MAJEURE

SECTION G
INDEMNITY, BONDING AND INSURANCE

G.1 RESPONSIBILITY FOR DAMAGES/INDEMNITY
G.2 PERFORMANCE AND PAYMENT SECURITY; PUBLIC WORKS BOND
G.3 INSURANCE

SECTION H
SCHEDULE OF WORK

H.1 CONTRACT PERIOD
H.2 SCHEDULE
H.3 PARTIAL OCCUPANCY OR USE
H.4 BENEFICIAL OCCUPANCY OR USE

SECTION I
CORRECTION OF WORK

I.1 CORRECTIONS OF WORK BEFORE FINAL PAYMENT
I.2 WARRANTY WORK

SECTION J
SUSPENSION AND/OR TERMINATION OF THE WORK

J.1 DISTRICT'S RIGHT TO SUSPEND THE WORK
J.2 CM/GC'S RESPONSIBILITIES
J.3 COMPENSATION FOR SUSPENSION
J.4 DISTRICT'S RIGHT TO TERMINATE CONTRACT
J.S TERMINATION FOR CONVENIENCE
J.6 ACTION UPON TERMINATION

SECTION K
CONTRACT CLOSE-OUT

K.1 SUBSTANTIAL COMPLETION DOCUMENTATION
K.2 RECORD DOCUMENTS
K.3 OPERATION AND MAINTENANCE MANUALS
K.4 AFFIDAVIT/RELEASE OF LIENS AND CLAIMS
K.5 COMPLETION NOTICES
K.6 TRAINING
K.7 EXTRA MATERIALS
K.8 ENVIRONMENTAL CLEAN-UP
K.9 CERTIFICATE OF OCCUPANCY
K.10 OTHER CM/GC RESPONSIBILITIES
K.11 SURVIVAL

SECTION L
LEGAL RELATIONS AND RESPONSIBILITY TO THE PUBLIC

L.1 LAWS TO BE OBSERVED

CM/GC GENERAL CONDITIONS FOR PUBLIC IMPROVEMENT

SECTION A
GENERAL PROVISIONS

A.1 DEFINITION OF TERMS

In the Contract Documents the following terms shall be as defined below:

ARCHITECT/ENGINEER, means the Person appointed by the District to make drawings and specifications and, to provide contract administration of the Work contemplated by the Contract to the extent provided herein or by supplemental instruction of District (under which District may delegate responsibilities of the District's Authorized Representative to the Architect/Engineer).

BENEFICIAL OCCUPANCY, means the point in time where the District will occupy a portion of the work for its intended use as defined by Substantial Completion, but prior to the Substantial Completion of the entirety of the Work (as in Phased Project completion).

CHANGE ORDER, means an approved eBuilder process or a written order issued by the District's Authorized Representative to the CM/GC requiring a change in the Work within the general scope of the Contract Documents, issued under the changes provisions of Section D.1 in administering the Contract, including District's written change directives as well as changes reflected in writing executed by the parties to this Contract and, if applicable, establishing a Contract Price or Contract Time adjustment for the changed Work.

CHANGE REQUEST, means an approved eBuilder process or a written request issued by the CM/GC or the District's Authorized Representative to the CM/GC.

CLAIM, means a demand or assertion in writing by one of the parties seeking, as a matter of contract, payment of money, or other relief with respect to the terms of the Contract. The term "Claim" also includes other disputes and matters in question between the Owner and CM/GC arising out of or relating to the Contract. The responsibility to substantiate Claims shall rest with the party making the Claim.

CONTRACT, means the written agreement between the District and the CM/GC comprised of the Contract Documents which describe the Work to be done and the obligations between the parties.

CONTRACT DOCUMENTS, The "Contract Documents" are enumerated in the Construction Contract between District and CM/GC ("Contract") and consist of the Contract, Conditions of the Contract (General, Supplementary and other Conditions), Drawings, Specifications, additions or deletions to, material changes in, or general interest explanations of a Solicitation Document ("Addenda") (other than Addenda relating to bidding requirements) issued prior to the bid, other documents listed in the Contract, and Modifications issued after execution of the Contract. The intent of the Contract Documents is to include all items necessary for the proper execution and completion of the Work by CM/GC. The Contract Documents are complementary, and what is required by one shall be as binding as if required by all. Performance by CM/GC shall be required only to the extent consistent with the Contract Documents and reasonably inferable from them as being necessary to produce the indicated results.

CONTRACT PERIOD, as set forth in the Contract Documents, means the total period of time beginning with the issuance of the Notice to Proceed and concluding upon Final Completion.

CONTRACT PRICE, means the total of the awarded Offer amount, as increased or decreased by the price of approved alternates and Change Orders.

CONTRACT SCHEDULE, The "Contract Schedule" is the graphical representation of the practical plan for carrying out the Work and completing the Work within the Contract Time as set forth in the Contract Documents. The Contract Schedule provides a list of intended events and times to complete each event as set forth in the Contract Documents.

CONTRACT TIME, means any incremental period of time allowed under the Contract to complete any portion of the Work as reflected in the project schedule.

DAYS, are calendar days, including weekdays, weekends and holidays, unless otherwise specified.

DIRECT COSTS, means, unless otherwise provided in the Contract Documents:

(1) Cost of labor, including:
   (a) Social security
   (b) Old age and unemployment insurance
   (c) Fringe benefits required by agreement or custom
   (d) Worker's compensation insurance
   (e) Project specific insurance
   (f) Additional costs of field personnel directly attributable to the Work.

(2) Cost of materials, including:
   (a) Sales tax
   (b) Cost of delivery
   (c) Expendable materials

(3) Equipment
   (a) Equipment rental costs
   (b) All tools and machinery required for execution of the work
   (c) Expendable items of equipment

(4) Bond premiums

DISTRICT, means Portland Public Schools acting by and through the governmental entity identified in the Solicitation Document.

DISTRICT'S AUTHORIZED REPRESENTATIVE, means those individuals identified in writing by the District to act on behalf of the District for this project. District may elect, by written notice to CM/GC, to delegate certain duties of the District's Authorized Representative to more than one party, including without limitation, to an Architect/Engineer. However, nothing in these General Conditions is intended to abrogate the separate design professional responsibilities of Architects under ORS Chapter 671 or of Engineers under ORS Chapter 672.

DRAWINGS, mean the graphic and pictorial portions of the Contract Documents showing the design, location and dimensions of the Work, generally including plans, elevations, sections, details, schedules, and diagrams.

FINAL COMPLETION, means the final completion of all requirements under the Contract, including Contract Closeout as described in Section K but excluding Warranty Work as described in Section I.2, and the final payment and release of all retainage, if any, released.

FORCE MAJEURE, means an act, event or occurrence caused by fire, riot, war, acts of God, nature, sovereign, or public enemy, strikes, freight embargoes or any other act, event or occurrence that is beyond the control of the party to this Contract who is asserting Force Majeure.

NOTICE TO PROCEED, means the official written notice from the District stating that the CM/GC is to proceed with the Work defined in the Contract Documents. Notwithstanding the Notice to Proceed, CM/GC shall not be authorized to proceed with the Work until all initial Contract requirements, including the Contract, performance bond and payment bond, and certificates of insurance, have been fully executed and submitted to District in a suitable form.

OFFER, means an offer to complete a specific scope for a set price in connection with an invitation to bid and a proposal in connection with a request for proposals.

OFFEROR, means an entity that submits an Offer in connection with an invitation to bid and a proposer in connection with a request for proposals.

OVERHEAD, means those items which may be included in the CM/GC's markup (general and administrative expense and profit) and that shall not be charged as Direct Cost of the Work, including without limitation such Overhead expenses as wages or salary of personnel above the level of foreman (i.e., superintendents and project managers), expenses of CM/GC's offices at the job site (e.g. job trailer) including expenses of personnel staffing the job site office, and Commercial General Liability Insurance and Automobile Liability Insurance.

PERSON, means an entity doing business as a sole proprietorship, a partnership, a joint venture, a corporation, a limited liability company or partnership, or any other entity possessing the legal capacity to contract.

PLANS, means the drawings which show the location, type, dimensions, and details of the Work to be done under the Contract.

PROJECT, means the total construction of which the Work performed under the Contract Documents may be the whole or a part and which may include construction by District and by separate Contractors.

PROJECT SITE, means the property upon which the Project lies and District's property that surrounds the Project, extending to the District's property boundary.

PUNCHLIST, means the list of Work yet to be completed or deficiencies which need to be corrected in order to achieve Final Completion of the Contract.

RECORD DOCUMENT, means the as-built Plans, Specifications, testing and inspection records, product data, samples, manufacturer and distributor/supplier warranties evidencing transfer to District, operational and maintenance manuals, shop drawings, Change Orders, correspondence, certificate(s) of occupancy, and other documents listed in Subsection B.9.1 of these General Conditions, recording all Services performed.

SOLICITATION DOCUMENT, means an invitation to bid or request for proposal or request for quotes.

SPECIFICATION, means any description of the physical or functional characteristics of the Work, or of the nature of a supply, service or construction item. Specifications may include a description of any requirement for inspecting, testing or preparing a supply, service or construction item for delivery and the quantities or qualities of materials to be furnished under the Contract. Specifications generally will state the results or products to be obtained and may, on occasion, describe the method and manner of doing the work to be performed. Specifications may be incorporated by reference and/or may be attached to the Contract.

SUBCONTRACTOR, means a Person having a direct contract with the CM/GC, or another Subcontractor, to perform one or more items of the Work.

SUBSTANTIAL COMPLETION, means the date when the District accepts in writing the construction, alteration or repair of the improvement to real property or any designated portion thereof as having reached that state of completion when it may be used or occupied for its intended purpose. Includes, but not limited to, meeting all requirements of the AHJ for the District to occupy and use the building for its intended use.

SUBSTITUTIONS, means items that in function, performance, reliability, quality, and general configuration are the same or better than the product(s) specified. Approval of any substitute item shall be solely determined by the District's Authorized Representative. The decision of the District's Authorized Representative is final.

SUPPLEMENTAL GENERAL CONDITIONS, means those conditions that remove from, add to, or modify these General Conditions. Supplemental General Conditions may be included in the Solicitation Document or may be a separate attachment to the Contract.

WORK, means the furnishing of all services, materials, equipment, labor and incidentals necessary to successfully complete any individual item or the entire Contract and the carrying out and completion of all duties and obligations imposed by the Contract.

A.2 SCOPE OF WORK

The Work contemplated under this Contract includes all labor, materials, transportation, equipment, expense and services for, and incidental to, the completion of all construction work In connection with the project described in the Contract Documents. The CM/GC shall perform all Work necessary so that the project can be legally occupied and fully used for the intended use as set forth in the Contract Documents.

A.3 INTERPRETATION OF CONTRACT DOCUMENTS

A.3.1 Unless otherwise specifically defined in the Contract Documents, words which have well-known technical meanings or construction industry meanings are used in the Contract Documents in accordance with such recognized meanings. Contract Documents are intended to be complementary. Whatever is called for in one, is interpreted to be called for in all. However, in the event of conflicts or discrepancies among the Contract Documents, interpretations will be based on the following descending order of precedence:

(1) Contract amendments and Change Orders, with those of later date having precedence over those of an earlier date;

(2) The Portland Public Schools Construction Manager/General Contractor Contract Form;

(3) The General Conditions

(4) The Plans and Specifications

(5) PPS Design Guidelines and Standards

(6) The Solicitation Document and any addenda thereto;

(7) The accepted Offer.

A.3.2 In the case of an inconsistency between Plans and Specifications or within either document not clarified by addendum, the better quality or greater quantity of Work shall be provided in accordance with the District or District's Authorized Representative's interpretation in writing.

A.3.3 If the CM/GC finds discrepancies in, or omissions from the Contract Documents, or if the CM/GC is in doubt as to their meaning, the CM/GC shall at once notify the District or District's Authorized Representative. Matters concerning performance under, and interpretation of requirements of, the Contract Documents will be decided by the District's Authorized Representative. Responses to CM/GC's requests for interpretation of Contract Documents will be made in writing by District's Authorized Representative within any time limits agreed upon or otherwise with reasonable promptness. Interpretations and decisions of the District's Authorized Representative will be consistent with the intent of and reasonably inferable from the Contract Documents. CM/GC shall not proceed without direction in writing from the District's Authorized Representative.

A.3.4 References to standard specifications, manuals, codes of any technical society, organization or association, to the laws or regulations of any governmental authority, whether such reference be specific or by implication, shall mean the latest standard specification, manual, code, laws or regulations in effect in the jurisdiction where the project is occurring on the first published date of the Solicitation Document, except as may be otherwise specifically stated.

A.4 EXAMINATION OF PLANS, SPECIFICATIONS, AND SITE

A.4.1 It is understood that the CM/GC, before submitting an Offer, has made a careful examination of the Contract Documents; has become fully Informed as to the quality and quantity of materials and the character of the Work required; and has made a careful examination of the location and conditions of the Work and the sources of supply for materials. The District will in no case be responsible for any loss or for any unanticipated costs that may be suffered by the CM/GC as a result of the CM/GC's failure to acquire full information in advance in regard to all conditions pertaining to the Work. No oral agreement or conversation with any officer, agent, or personnel of the District, or with the Architect/Engineer either before or after the execution of this Contract, shall affect or modify any of the terms or obligations herein contained.

A.4.2 District shall make available to CM/GC, and CM/GC shall study, the results of such test borings and information that District has concerning subsurface conditions and site geology. CM/GC shall inform District of any other site investigation, analysis, study, or test conducted by or for CM/GC or its agents and shall make the results available to District upon District's request.

A.4.3 Should the Plans or Specifications fail to particularly describe the materials, kind of goods, or details of construction of any aspect of the Work, CM/GC shall have the duty to make inquiry of the District and Architect/Engineer (through the eBuilder RFI process) as to what is required prior to performance of the Work. Absent Specifications to the contrary, the materials or processes that would normally be used to produce first quality finished Work shall be considered a part of the Contract requirements.

A.4.4 Any design errors or omissions noted by the CM/GC shall be reported promptly to the District's Authorized Representative (through the eBuilder RFI process), including without limitation, any nonconformity with applicable laws, statutes, ordinances, building codes, rules and regulations.

A.4.5 If the CM/GC believes that additional cost or Contract Time is involved because of clarifications or instructions issued by the District's Authorized Representative in response to the CM/GC's notices or requests for information, the CM/GC must submit a written request to the District's Authorized Representative, setting forth the nature and specific extent of the request, including all time and cost impacts against the Contract as soon as possible, but no later than twenty (20) business days after receipt by CM/GC of the clarifications or instructions issued. If the District's Authorized Representative denies CM/GC's request for additional compensation, additional Contract Time, or other relief that CM/GC believes results from the clarifications or instructions, the CM/GC may proceed to file a Claim under Section D.3, Claims Review Process. If the CM/GC fails to perform the obligations of Sections A.4.1 to A.4.3, the CM/GC shall pay such costs and damages to the District as would have been avoided if the CM/GC had performed such obligations.

A.5 INDEPENDENT CONTRACTOR STATUS

The service or services to be performed under this Contract are those of an independent contractor as defined in ORS 670.600. CM/GC represents and warrants that it is not an officer, employee or agent of the District.

A.6 RETIREMENT SYSTEM STATUS AND TAXES

CM/GC represents and warrants that it is not a contributing member of the Public Employees' Retirement System and will be responsible for any federal or state taxes applicable to payment received under this Contract. CM/GC will not be eligible for any benefits from these Contract payments of federal Social Security, employment insurance, workers' compensation or the Public Employees' Retirement System, except as a self-employed individual. Unless the CM/GC is subject to backup withholding, District will not withhold from such payments any amount(s) to cover CM/GC's federal or state tax obligations.

A.7 GOVERNMENT EMPLOYMENT STATUS

A.7.1 If this payment is to be charged against federal funds, CM/GC represents and warrants that it is not currently employed by the Federal Government. This does not preclude the CM/GC from holding another contract with the Federal Government.

A.7.2 CM/GC represents and warrants that CM/GC is not an employee of the District for purposes of performing Work under this Contract.

SECTION B
ADMINISTRATION OF THE CONTRACT

B.1 DISTRICT'S ADMINISTRATION OF THE CONTRACT

B.1.1 The District's Authorized Representative will provide administration of the Contract as described in the Contract Documents (1) during construction (2) until final payment is due and (3) during the one-year period for correction of Work. The District's Authorized Representative will act on behalf of the District to the extent provided in the Contract Documents, unless modified in writing in accordance with other provisions of the Contract. In performing these tasks, the District's Authorized Representative may rely on the Architect/Engineer or other consultants to perform some or all of these tasks.

B.1.2 The District's Authorized Representative will visit the site at intervals appropriate to the stage of the CM/GC's operations (1) to become generally familiar with and to keep the District informed about the progress and quality of the portion of the Work completed, (2) to endeavor to guard the District against defects and deficiencies in the Work, and (3) to determine in general if Work is being performed in a manner indicating that the Work, when fully completed, will be in accordance with the Contract Documents. The District's Authorized Representative will not make exhaustive or continuous on-site inspections to check the quality or quantity of the Work. The District's Authorized Representative will neither have control over or charge of, nor be responsible for the construction means, methods, techniques, sequences or procedures, or for the safety precautions and programs in connection with the Work.

B.1.3 Except as otherwise provided in the Contract Documents or when direct communications have been specifically authorized, the District and CM/GC shall endeavor to communicate with each other through the District's Authorized Representative or designee about matters arising out of or relating to the Contract. Communications by and with the Architect/Engineer's consultants shall be through the Architect/Engineer. Communications by and with Subcontractors and material suppliers shall be through the CM/GC. Communications by and with separate CM/GCs shall be through the District's Authorized Representative.

B.1.4 Based upon the Architect/Engineer's evaluations of the CM/GC's Application for Payment, or unless otherwise stipulated by the District's Authorized Representative, the Architect/Engineer will review and certify the amounts due the CM/GC and will issue Certificates for Payment in such amounts.

B.2 CM/GC'S MEANS AND METHODS; MITIGATION OF IMPACTS

B.2.1 The CM/GC shall supervise and direct the Work, using the CM/GC's best skill and attention. The CM/GC shall be solely responsible for and have control over construction means, methods, techniques, sequences and procedures and for coordinating all portions of the Work under the Contract, unless the Contract Documents give other specific instructions concerning these matters. If the Contract Documents give specific instructions concerning construction means, methods, techniques, sequences or procedures, the CM/GC shall evaluate the jobsite safety thereof and, except as stated below, shall be fully and solely responsible for the jobsite safety of such means, methods, techniques, sequences or procedures. If the CM/GC determines that such means, methods, techniques, sequences or procedures may not be safe, the CM/GC shall give timely written notice to the District's Authorized Representative and shall not proceed with that portion of the Work without further written instructions from the District's Authorized Representative. If the CM/GC is then instructed to proceed with the required means, methods, techniques, sequences, or procedures, the District shall be solely responsible for any loss or damage arising from those District required means, methods, techniques, sequences, or procedures

B.2.2 The CM/GC is responsible to protect and maintain the Work during the course of construction and to mitigate any adverse impacts to the project, including those caused by authorized changes, which may affect cost, schedule, or quality.

B.2.3 The CM/GC is responsible for the actions of all its personnel, laborers, suppliers, and Subcontractors on the project. The CM/GC shall enforce strict discipline and good order among CM/GC's employees and other persons carrying out the Work. The CM/GC shall not permit employment of persons who are unfit or unskilled for the tasks assigned to them.

B.3 MATERIALS AND WORKMANSHIP

B.3.1 The intent of the Contract Documents is to provide for the construction and completion in every detail of the Work described. All Work shall be performed in a professional manner and unless the means or methods of performing a task are specified elsewhere in the Contract Documents, CM/GC shall employ methods that are generally accepted and used by the industry, in accordance with industry standards.

B.3.2 The CM/GC is responsible to perform the Work as required by the Contract Documents. Defective Work shall be corrected at the CM/GC's expense.

B.3.3 Work done and materials furnished shall be subject to inspection and/or observation and testing by the District's Authorized Representative to determine if they conform to the Contract Documents. Inspection of the Work by the District's Authorized Representative does not relieve the CM/GC of responsibility for the Work in accordance with the Contract Documents. The review by District or Architect of any method of construction, invention, appliance, process, article, device, or material of any kind is limited to a review for adequacy for the Work and is not approval for use by CM/GC In violation of any patent or other rights of any person or entity.

B.3.4 CM/GC shall furnish adequate facilities, as required, for the District's Authorized Representative to have safe access to the Work including without limitation walkways, railings, ladders, tunnels, and platforms. Producers, suppliers, and fabricators shall also provide proper facilities and access to their facilities.

B.3.5 The CM/GC shall furnish Samples of materials for testing by the District's Authorized Representative and include the cost of the Samples in the Contract Price.

B.3.6 CM/GC shall provide materials in sufficient quantities on hand at such times as to insure uninterrupted progress of Work and shall store materials properly and protect materials as required.

B.3.7 For all materials and equipment specified or indicated in the Drawings, CM/GC shall provide all labor, materials, equipment, and services necessary for complete assemblies and complete working systems, functioning as intended. CM/GC shall furnish incidental items not indicated on Drawings, nor mentioned in the Specifications, that can be legitimately and reasonably inferred to belong to the Work described, or necessary in good practice to provide a complete

assembly or system, as though itemized here in every detail. In all instances, CM/GC shall install material and equipment in strict accordance with each manufacturer's most recent published recommendations and specifications. CM/GC shall be responsible for appropriately sequencing the Work and for verification of suitability of prior work before subsequent construction activities.

B.3.8 The CM/GC shall coordinate submittal approvals and place orders for materials and/or equipment so that delivery of same will be made without delays to the Work. CM/GC shall, upon District's reasonable request, provide documentary evidence that orders have been placed.

B.3.9 If the District elects to conduct an independent review, monitoring, inspection, or other oversight of the CM/GC's performance of any or all of the Work under the contract, the CM/GC will fully cooperate with the independent reviewer selected by the District

B.4 PERMITS

CM/GC shall obtain and pay for all necessary licenses and trade permits for the construction of the Work, for temporary obstructions, enclosures, opening of streets for pipes, walls, utilities, environmental Work, etc., as required for the project. CM/GC shall be responsible for all violations of the law, in connection with the construction or caused by obstructing streets, sidewalks or otherwise. CM/GC shall give all requisite notices to public authorities. The CM/GC shall pay all royalties, taxes, tariffs, and license fees. The CM/GC shall defend, indemnify, and hold harmless from loss, on account thereof, the District and its employees and agents from all suits or claims for infringement of any patent or other proprietary rights to the extent associated with design elements for which the CM/GC is responsible.

B.5 COMPLIANCE WITH GOVERNMENT LAWS AND REGULATIONS

B.5.1 CM/GC shall comply with all federal, state and local laws, codes, regulations and ordinances applicable to the Work and the Contract. Failure to comply with such requirements shall constitute a breach of Contract and shall be grounds for Contract termination. Without limiting the generality of the foregoing, CM/GC expressly agrees to comply with the following as applicable:

(1) Title VI and VII of Civil Rights Act of 1964, as amended;

(2) Section 503 and 504 of the Rehabilitation Act of 1973, as amended;

(3) the Health Insurance Portability and Accountability Act of 1996;

(4) the Americans with Disabilities Act of 1990, as amended;

(5) ORS Chapter 659A; as amended

(6) all regulations and administrative rules established pursuant to the foregoing laws; and

(7) all other applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations.

B.5.2 CM/GC shall comply with all applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations; and

(1) CM/GC shall not discriminate against a subcontractor in awarding a subcontract because the subcontractor is a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business, as those terms are defined in ORS 200.005 (ORS 279A.110.)

(2) If CM/GC is performing work as a landscape contractor as defined in ORS 671.520(2), CM/GC must have a current, valid landscape contractor's license issued under ORS 671.560.

(3) If CM/GC is performing work as a Contractor as defined in ORS 701.005(2), CM/GC must have a current, valid construction contractor's license issued under ORS 701.026.

(4) CM/GC shall maintain, in current and valid form, all licenses and certificates required by law, regulation, or this Contract when performing the Work.

(5) CM/GC will notify the Owner immediately if any license, permit, or certification required for performance of this Contract will cease to be in effect for any reason.

B.5.3 Unless contrary to federal law, CM/GC shall certify that it shall not accept a bid from Subcontractors to perform Work as described in ORS 701.005 under this Contract unless such Subcontractors are registered with the Construction Contractors Board in accordance with PPS-49-0200(c)(U) (reference ORS 701.035 to 701.055) at the time they submit their bids to the CM/GC.

B.5.4 Unless contrary to federal law, CM/GC shall certify that each landscape contractor, as defined in PPS-49-0230 (reference ORS 671.520(2)), performing Work under this Contract holds a valid landscape contractor's license issued pursuant to PPS-49-0230 (reference ORS 671.560).

B.5.5 The following notice is applicable to Contractor or CM/GC who performs excavation Work. ATTENTION: Oregon law requires you to follow rules adopted by the Oregon Utility Notification Center. Those rules are set forth in OAR 952-001-0010 through OAR 952-001-0090. You may obtain copies of the rules by calling the center at (503)232-1987.

B.5.6 Because the Work will include demolition work, pursuant to PPS-49-0200(c)(C) (reference ORS 279C.510) the CM/GC shall salvage or recycle construction and demolition debris, if feasible and cost effective.

B.5.7 Failure to comply with any or all of the requirements of B.5.1 through B.5.6 shall be a breach of Contract and constitute grounds for Contract termination. CM/GC will bear all costs arising from Work performed that it knew, or through exercise of reasonable care should have known, was contrary to any applicable laws, ordinance, rules, or regulations.

B.6 SUPERINTENDENCE /PROJECT MANAGEMENT

B.6.1 CM/GC shall keep on the site, during the progress of the Work, a competent superintendent and any necessary assistants who shall be satisfactory to the District and who shall represent the CM/GC on the site and who will be empowered to obligate the CM/GC. Directions given to the superintendent by the District's Authorized Representative shall be confirmed in writing to the CM/GC. The Superintendent shall be fluent in both written and verbal English and be able to effectively communicate with the District's Representatives

B.6.2 The Superintendent, Project Manager and Project Engineer/Assistant Project Manager (if applicable) shall not be removed from the Project by the CM/GC without the prior written authorization of the District. Requests to replace personnel must be made a minimum of thirty (30) calendar days prior to the proposed date of replacement. Authorization shall not be unreasonably withheld.

B.6.3 CM/GC shall at all times enforce strict discipline and good order among its subcontractors and employees and shall not employ or work any unfit person, or anyone not skilled in work assigned to that person. District may require the CM/GC to permanently remove any of its officers, agents, employees, or subcontractors from all District properties in cases where District determines in its sole discretion that removal of such is in District's best interests. CM/GC shall not employ any person whom the District may deem incompetent or unfit on the Project except with the prior written consent of the District. District may require removal and replacement of any or all construction superintendents, project managers, foreman, or other staff from the Project upon ten (10) business days written notice to the CM/GC.

B.6.4 CM/GC shall maintain at least one (1) set of reports on the Project prepared by CM/GC's employee(s) present on site, and which includes following information: a brief description of all Work performed on that day; a summary of all pertinent events and/or occurrences on that day including records of all tests and inspections; a list of all subcontractor(s) working on that day; ; the time Work commenced and ended; weather conditions; accidents or injuries; and Work progress made for that day ("Daily Job Reports"). CM/GC shall keep the Daily Job Reports current in eBuilder and in good order and shall make current copies available to District upon request.

B.7 INSPECTION

B.7.1 District's Authorized Representative and project team shall have safe access to the Work at all times.

B.7.2 Inspection of the Work will be made by the District's Authorized Representative and its' designees at its discretion. The District's Authorized Representatives will have authority to reject Work that does not conform to the Contract Documents. Any Work found to be not in conformance with the Contract Documents, in the discretion of the District's Authorized Representative, shall be removed and replaced at the CM/GC's expense.

B.7.3 CM/GC shall make or obtain at the appropriate time all tests, inspections and approvals of portions of the Work required by the Contract Documents or by laws, ordinances, rules, regulations or orders of public authorities having jurisdiction. Unless otherwise provided, the CM/GC shall make arrangements for such tests, inspections and approvals with an independent testing laboratory or entity acceptable to the District, or with the appropriate public authority, and shall bear all related costs of tests, inspections and approvals. Tests or inspections conducted pursuant to the Contract Documents shall be made promptly to avoid unreasonable delay in the Work. The CM/GC shall give the District's Authorized Representative no less than 48 hours notice of when and where tests and inspections are to be made so that the District's Authorized Representative(s) may be present for such procedures. Required certificates of testing, inspection or approval shall, unless otherwise required by the Contract Documents, be secured by the CM/GC and promptly delivered to the District's Authorized Representative(s).

B.7.4 As required by the Contract Documents, Work done or material used without inspection or testing by the District's Authorized Representative(s) may be ordered removed at the CM/GC's expense.

B.7.5 If directed to do so any time before the Work is accepted, the CM/GC shall uncover portions of the completed Work for inspection. After inspection, the CM/GC shall restore such portions of Work to the standard required by the Contract. If the Work uncovered is unacceptable or was done without sufficient notice to the District's Authorized Representative, the uncovering and restoration shall be done at the CM/GC's expense. If the Work uncovered is acceptable and was done with sufficient notice to the District's Authorized Representative(s), the uncovering and restoration will be paid for as a Change Order.

B.7.6 If any testing or inspection reveals failure of the portions of the Work to comply with requirements established by the Contract Documents, all costs made necessary by such failure, including those of repeated procedures and compensation for the District's Authorized Representative's and Architect/Engineer's services and expenses, shall be at the CM/GC's expense.

(1) CM/GC shall be granted one (1) re-Inspection for each inspection required by the Contract Documents. Additional inspections required beyond the initial and re-inspection shall be the responsibility of the CM/GC. The District's Testing and Inspection firm shall not unreasonably require re-inspections.

B.7.7 When the United States government participates in the cost of the Work, or the District has an agreement with other public or private organizations, or if any portion of the Work is being performed for a third party or in close proximity to third party facilities, representatives of these organizations have the right to inspect the Work affecting their interests or property. Their right to inspect shall not make them a party to the Contract and shall not interfere with the rights of the parties of the Contract. Instructions or orders of such parties shall be transmitted to the CM/GC, through the District's Authorized Representative.

B.8 SEVERABILITY

If any provision of this Contract is declared by a court to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected and the rights and obligations of the parties shall be construed and enforced as if the Contract did not contain the particular provision held to be invalid.

B.9 ACCESS TO RECORDS

B.9.1 CM/GC shall keep, at all times on the Work site, one record copy of the complete Contract Documents, including the Plans, Specifications, Change Orders and addenda, in good order and marked currently to record field changes and selections made during construction, and one record copy of Shop Drawings, Product Data, Samples and similar submittals, and shall at all times give the District's Authorized Representative access thereto.

B.9.2 CM/GC shall retain and the District and its duly authorized representatives shall have access to, for a period not less than six (6) years, all Record Documents, financial and accounting records, and other books, documents, papers and records of CM/GC which are pertinent to the Contract including records pertaining to Overhead and indirect costs, for the purpose of making audit, examination, excerpts and transcripts. If for any reason, any part of the Contract is involved in a dispute resolution process, CM/GC shall retain all such records until all disputes are resolved. The District and/or its agents shall continue to be provided full access to the records during any dispute resolution process, as is customary in the dispute resolution process and/or ordered by the decider(s) of the dispute.

B.10 WAIVER

Failure of the District to enforce any provision of this Contract shall not constitute a waiver or relinquishment by the District of the right to such performance in the future nor of the right to enforce any other provision of this Contract.

B.11 SUBCONTRACTS AND ASSIGNMENT

B.11.1 CM/GC shall require each Subcontractor, to the extent of the Work to be performed by the Subcontractor, to be bound by the terms and conditions of these General Conditions, and to assume toward the CM/GC all of the obligations and responsibilities which the CM/GC assumes toward the District thereunder, unless (1) the same are clearly inapplicable to the subcontract at issue because of legal requirements or industry practices, or (2) specific exceptions are requested by CM/GC and approved in writing by District. Where appropriate, CM/GC shall require each Subcontractor to enter into similar agreements with sub-subcontractors at any level. CM/GC shall include assignment provisions in each subcontract as indicated in the termination provisions set forth in these General Conditions.

B.11.2 At District's request, CM/GC shall submit to District prior to their execution either CM/GC's form of subcontract, or the subcontract to be executed with any particular Subcontractor. If District disapproves such form, CM/GC shall not execute the form until the matters disapproved are resolved to District's satisfaction. District's review, comment upon or approval of any such form shall not relieve CM/GC of its obligations under this Agreement or be deemed a waiver of such obligations of CM/GC.

B.11.3 CM/GC shall not assign, sell, or transfer its rights, or delegate its responsibilities under this Contract, in whole or in part, without the prior written approval of the District. No such written approval shall relieve CM/GC of any obligations of this Contract, and any transferee shall be considered the agent of the CM/GC and bound to perform in accordance with the Contract Documents. CM/GC shall remain liable as between the original parties to the Contract as if no assignment had occurred.

B.11.4 CM/GC shall first notify District prior to any change in the name or legal nature or status of CM/GC's entity. District shall determine if CM/GC's intended change is permissible while performing this Contract.

B.12 SUCCESSORS IN INTEREST

The provisions of this Contract shall be binding upon and shall accrue to the benefit of the parties to the Contract and their respective permitted successors and assigns.

B.13 DISTRICT'S RIGHT TO DO WORK

District reserves the right to perform other or additional work at or near the project site with other forces than those of the CM/GC. If such work takes place within or next to the project site, CM/GC will coordinate work with the other contractors or forces, cooperate with all other contractors or forces, carry out the Work in a way that will minimize interference and delay for all forces involved, place and dispose of materials being used so as not to interfere with the operations of another, and join the Work with the work of the others in an acceptable manner and perform it in proper sequence to that of the others. The District's Authorized Representative will resolve any disagreements that may arise between or among CM/GC and the other contractors over the method or order of doing all work (including the Work). In case of unavoidable interference, the District's Authorized Representative will establish work priority (including the Work) which generally will be in the sequence that the contracts were awarded.

B.14 OTHER CONTRACTS

In all cases and at any time, the District has the right to execute other contracts related to or unrelated to the Work of this Contract. District shall indemnify, defend, and hold CM/GC and its affiliated companies harmless from all claims, loss, and damage, including without limitation, injuries and/or death to contractor's employees, to the extent that District's separate contractors caused the claim, loss, or damage while working on the project site. CM/GC shall implement a safety program that shall apply to the Project. Owner shall require all separate contractors, their employees, lower-tier contractors and their employees performing work on the Project to comply with the applicable safety protocols including attendance at orientation, required safety clothing and practices on the jobsite. The CM/GC of this Contract will fully cooperate with any and all other contractors without additional cost to the District in the manner described in section B.13. Specifically and without limitation,

(1) CM/GC shall coordinate and work in conjunction with the District and District's third party consultants to proactively commission the Project in preparation of Owner occupancy and acceptance.

(2) CM/GC shall provide District with a copy of all written communications between CM/GC and District's consultants at the same time as that communication is made to such consultants, including, without limitation, all requests for information, correspondence, submittals, notices, and change order proposals. CM/GC shall confirm oral communications in writing.

(3) CM/GC is liable for costs incurred by District for professional services for interpretations or decisions of matters where the Information sought is equally available to the party making the request.

B.15 GOVERNING LAW

This Contract shall be governed by and construed in accordance with the laws of the State of Oregon without regard to principles of conflict of laws.

B.16 LITIGATION

Any Claim between District and CM/GC that arises from or relates to this Contract and that is not resolved through the Claims Review Process in Section D.3 shall be brought and conducted solely and exclusively within the Circuit Court of Multnomah County for the State of Oregon; provided, however, if a Claim must be brought in a federal forum, then it shall

be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event shall this section be construed as a waiver by the District of defense or immunity, whether sovereign immunity, governmental immunity, or otherwise, from any claim or from the jurisdiction of any court. CM/GC BY EXECUTION OF THIS CONTRACT HEREBY CONSENTS TO THE IN PERSONAM JURISDICTION OF THE COURTS REFERENCED IN THIS SECTION B.16.

B.17 ALLOWANCES

B.17.1 The CM/GC shall include in the Contract Price all allowances stated in the Contract Documents. Items covered by allowances shall be supplied for such amounts and by such persons or entities as the District may direct.

B.17.2 Unless otherwise provided in the Contract Documents:

(1) allowances shall cover the cost to the CM/GC of materials and equipment delivered at the site and all required taxes

(2) CM/GC's costs for unloading and handling at the site, labor, installation costs, Overhead, profit and other expenses contemplated for stated allowance amounts shall be included in the allowances;

(3) Unless District requests otherwise, CM/GC shall provide to District a proposed fixed price for any allowance work prior to its performance.

(4) Work will only begin on allowances after approval has been issued by the District.

B.18 SUBMITTALS, SHOP DRAWINGS, PRODUCT DATA AND SAMPLES

B.18.1 The CM/GC shall prepare and keep current, for the approval of District's Authorized Representative, a schedule and list of submittals which is coordinated with the CM/GC's construction schedule and allows the Architect/Engineer reasonable time, but in no case less than ten (10) business days, to review submittals. District reserves the right to approve the schedule and list of submittals. Submittals include, without limitation, Shop Drawings, Product Data, and Samples which are described below:

(1) Shop Drawings are drawings, diagrams, schedules and other data specially prepared for the Work by the CM/GC or a Subcontractor (including any sub-subcontractor), manufacturer, supplier or distributor to illustrate some portion of the Work.

(2) Product Data are illustrations, standard schedules, performance charts, instructions, brochures, diagrams and other information furnished by the CM/GC to illustrate materials or equipment for some portion of the Work.

(3) Samples are physical examples which illustrate materials, equipment or workmanship and establish standards by which the Work will be judged.

B.18.2 Shop Drawings, Product Data, Samples and similar submittals are not Contract Documents. The purpose of their submittal is to demonstrate for those portions of the Work for which submittals are required by the Contract Documents the way by which the CM/GC proposes to conform to the information given and the design concept expressed in the Contract Documents. Review of submittals by the Architect/Engineer or District is not conducted for the purpose of determining the accuracy and completeness of other details such as dimensions and quantities, or for substantiating instructions for installation or performance of equipment or systems, or for approval of safety precautions or, unless otherwise specifically stated by the Architect/Engineer or District, of any construction means, methods, techniques, sequences or procedures, all of which remain the responsibility of the CM/GC as required by the Contract Documents. The Architect/Engineer's or District's review of the CM/GC's submittals shall not relieve the CM/GC of its obligations under the Contract Documents. The Architect/Engineer's or District's review of a specific item shall not indicate approval of an assembly of which the item is a component. Informational submittals upon which the Architect/Engineer or District is not expected to take responsive action may be so identified in the Contract Documents. Submittals which are not required by the Contract Documents may be returned without action.

B.18.3 The CM/GC shall review for compliance with the Contract Documents, approve and submit to the Architect/Engineer Shop Drawings, Product Data, Samples and similar submittals required by the Contract Documents with reasonable promptness and in such sequence as to cause no delay in the Work or in the activities of the District or of separate CM/GCs. Submittals which are not marked as reviewed for compliance with the Contract Documents and approved by the CM/GC may be returned without action.

(1) CM/GC shall be granted one (1) resubmittal review for each submittal required by the Contract Documents. Additional reviews required beyond the initial submittal and re-submittal shall be the responsibility of the CM/GC if the initial submittal or any subsequent submittal does not comply with the Contract Documents. A/E shall not unreasonably require re-submittals. The District reserves the right to make the final determination if a re-submittal is required or if CM/GC may proceed by incorporating A/E's comments.

B.18.4 By approving and submitting Shop Drawings, Product Data, Samples and similar submittals, the CM/GC represents that the CM/GC has determined and verified materials, field measurements and field construction criteria related thereto, or will do so, and has checked and coordinated the information contained within such submittals with the requirements of the Work and of the Contract Documents.

B.18.5 The CM/GC shall perform no portion of the Work for which the Contract Documents require submittal and review of Shop Drawings, Product Data, Samples or similar submittals until the respective submittal has been approved by the Architect/Engineer. CM/GC shall be responsible to provide submittals for A/E and District review in a timely manner to allow sufficient time for review and comment. Delay claims associated with submittals lacking appropriate review time allowances shall not be considered.

B.18.6 The Work shall be in accordance with approved submittals except that the CM/GC shall not be relieved of responsibility for deviations from requirements of the Contract Documents by the Architect/Engineer's or District's review or approval of Shop Drawings, Product Data, Samples or similar submittals unless the CM/GC has specifically informed the Architect/Engineer and District in writing of such deviation at the time of submittal and (i) the Architect/Engineer has given written approval to the specific deviation as a minor change in the Work, or (ii) a Change Order has been executed by District authorizing the deviation. The CM/GC shall not be relieved of responsibility for errors or omissions in Shop Drawings, Product Data, Samples or similar submittals by any review or approval thereof.

B.18.7 In the event that District elects not to have the obligations and duties described under this Section B.18 performed by the Architect/Engineer, or in the event no Architect/Engineer is employed by District on the project, all obligations and duties assigned to the Architect/Engineer hereunder shall be performed by the District's Authorized Representative.

B.19 SUBSTITUTIONS

The CM/GC may make Substitutions only with the consent of the District and at its sole discretion, after evaluation by the District's Authorized Representative and only in accordance with a Change Order. Substitutions shall be subject to the requirements of the bid documents. By making requests for Substitutions, the CM/GC represents that the CM/GC has personally investigated the proposed substitute product; represents that the CM/GC will provide the same warranty for the Substitution that the CM/GC would for the product originally specified unless approved otherwise; certifies that the cost data presented is complete and includes all related costs under this Contract including redesign costs, and waives all claims for additional costs related to the Substitution which subsequently become apparent; and will coordinate the installation of the accepted Substitution, making such changes as may be required for the Work to be completed in all respects.

B.20 USE OF PLANS AND SPECIFICATIONS

Plans, Specifications and related Contract Documents, including those in electronic format, furnished to CM/GC by District or District's Architect/Engineer shall be used solely for the performance of the Work under this Contract. CM/GC and its Subcontractors and suppliers are authorized to use and reproduce applicable portions of such documents appropriate to the execution of the Work, but shall not claim any ownership or other interest in them beyond the scope of this Contract, and no such interest shall attach. Unless otherwise indicated, all common law, statutory and other reserved rights, in addition to copyrights, are retained by District.

B.21 FUNDS AVAILABLE AND AUTHORIZED

District reasonably believes at the time of entering into this Contract that sufficient funds are available and authorized for expenditure to finance the cost of this Contract within the District's appropriation or limitation.

B.22 NO THIRD PARTY BENEFICIARIES

District and CM/GC are the only parties to this Contract and are the only parties entitled to enforce its terms. Nothing in this Contract gives, is intended to give, or shall be construed to give or provide any benefit or right, whether directly, indirectly, or otherwise, to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of the terms of this Contract.

B.23 RULES REGARDING CONTACT WITH THE PRESS AND PUBLICATIONS

CM/GC shall issue no news release, press release, or other statement to members of the news media or any other publication regarding this Agreement or the Project within one (1) year of Project completion without District's prior written authorization. CM/GC shall not post or publish any textual or visual representations of the Project without approval of District.

SECTION C
WAGES, LABOR, AND PAYMENT

C.1 PREVAILING WAGE RATES ON PUBLIC WORKS

C.1.1 This Contract is subject to payment of prevailing wages under ORS 279C.800 to 279C.870. Each worker the CM/GC, subcontractor or other person who is party to the contract uses in performing all or part of the Contract must be paid not less than the applicable prevailing rate of wage for each trade or occupation as defined by the Director of the State of Oregon Bureau of Labor and Industries ("BOLI") in the applicable publication entitled Definitions of Covered Occupations for Public Works Contracts in Oregon. The latest prevailing wage rates for public works contracts in Oregon are contained in the following publications: The Prevailing Wage Rates for Public Works Projects in Oregon, the PWR Apprenticeship Rates, and any amendments to the PWR rates or Apprenticeship rates. Such publications can be reviewed electronically at http://www.boli.state.or.us/BOLI/WHD/PWR/pwr_state.shtml.

C.1.2 This Contract is _____ /is not _____ also subject to payment of prevailing wages under the federal Davis-Bacon Act (40 U.S.C. 3141 et seq.). Notwithstanding Section C.1.1 of this Section, if this Contract is also subject to payment of prevailing wages under the Davis-Bacon Act, CM/GC and any subcontractors must pay the higher of the federal prevailing wage rate or the state prevailing wage. The latest federal prevailing wage rates can be reviewed electronically at http://www.wdol.gov/Index.aspx (Search for Oregon, Multnomah County, Building Construction Type). Contractors shall follow all prevailing wage rules including posting the Davis Bacon Poster at the worksite and submitting certified payroll records. The poster is available at http://www.dol.gov/whd/regs/compliance/posters/fedprojc.pdf. The payroll form is at http://www.dol.gov/whd/forms/wh347instr.htm.

C.1.3 The applicable prevailing wages under subsections C.1.1 and, if applicable, C.1.2, will be those in effect on the start of the Construction Phase as described in Section 3.b of the CM/GC Contract, and shall be incorporated by reference in the GMP Amendment or, if applicable, the Early Work Amendment.

C.1.4 During the Construction Phase, CM/GC and all Subcontractors will keep the prevailing wage rates for this Project posted in a conspicuous and accessible place in or about the Project.

C.1.5 The District will pay a fee to the Commissioner of the Oregon Bureau of Labor and Industries as provided in ORS 279C.825. The fee will be paid to the Commissioner under the administrative rule of the Commissioner.

C.1.6 CM/GC or any Subcontractor also provides for or contributes to a health and welfare plan or a pension plan, or both, for its employees on the Project, it will post notice describing such plans in a conspicuous and accessible place in or about the Project during the Construction Phase. The notice will contain information on how and where to make claims and where to obtain future information.

C.2 PAYROLL CERTIFICATION; ADDITIONAL RETAINAGE; FEE REQUIREMENTS

C.2.1 In accordance with ORS 279C.845, the CM/GC and every Subcontractor shall submit written certified statements to the District's Authorized Representative, on the form prescribed by the Commissioner of the Bureau of Labor and Industries, certifying the hourly rate of wage paid each worker which the CM/GC or the Subcontractor has employed on the project and further certifying that no worker employed on the project has been paid less than the prevailing rate of wage or less than the minimum hourly rate of wage specified in the Contract, which certificate and statement shall be verified by the oath of the CM/GC or the Subcontractor that the CM/GC or Subcontractor has read such statement and certificate and knows the contents thereof and that the same is true to the CM/GC or Subcontractor's best knowledge and belief. The certified statements shall set out accurately and completely the payroll records for the prior week including the name and address of each worker, the worker's correct classification, rate of pay, daily and weekly number of hours worked, deductions made and actual wages paid. Certified statements for each week during which the CM/GC or Subcontractor has employed a worker on the project shall be submitted once a month, by the fifth business day of the following month.

The CM/GC and Subcontractors shall preserve the certified statements for a period of six (6) years from the date of completion of the Contract.

C.2.2 Pursuant to PPS-49-0820(6), the District shall retain 25 percent of any amount earned by the CM/GC on this public works project until the CM/GC has filed the certified statements required by section C.2.1. The District shall pay to the CM/GC the amount retained under this subsection within 14 days after the CM/GC files the required certified statements, regardless of whether a Subcontractor has failed to file certified statements.

C.2.3 Pursuant to PPS-49-0820 (reference ORS 279C.845(8), the CM/GC shall retain 25 percent of any amount earned by a first-tier Subcontractor on this public works project until the first-tier Subcontractor has filed with the District the certified statements required by C.2.1. Before paying any amount retained under this subsection, the CM/GC shall verify that the first-tier Subcontractor has filed the certified statement, Within 14 days after the first-tier Subcontractor files the required certified statement the CM/GC shall pay the first-tier Subcontractor any amount retained under this subsection.

C.3 PROMPT PAYMENT AND CONTRACT CONDITIONS

C.3.1 Pursuant to PPS-49-0220(c) (reference ORS 279C.505) and as a condition to CM/GC's performance hereunder, the CM/GC shall:

(1) Make payment promptly, as due, to all persons supplying to CM/GC labor or materials for the prosecution of the Work provided for in this Contract.

(2) Pay all contributions or amounts due the State Industrial Accident Fund from such CM/GC or Subcontractor incurred in the performance of the Contract.

(3) Not permit any lien or claim to be filed or prosecuted against the District on account of any labor or material furnished. CM/GC will not assign any claims that CM/GC has against District, or assign any sums due by District, to Subcontractors, suppliers, or manufacturers, and will not make any agreement or act in any way to give Subcontractors a claim or standing to make a claim against the District.

(4) Pay to the Department of Revenue all sums withheld from employees pursuant to ORS 316.167.

(5) Demonstrate that an employee drug testing program is in place as follows:

(A) CM/GC represents and warrants that CM/GC has in place at the time of the execution of this contract, and shall maintain during the term of this Contract, a qualifying employee drug testing program for its employees that includes, at a minimum, the following:

i. a written employee drug testing policy,

ii. required drug testing for all new subject employees or, alternatively, required testing of all subject employees every 12 months on a random selection basis, and

iii. requested testing of a subject employee when the CM/GC has reasonable cause to believe the subject employee is under the influence of drugs.

A drug testing program that meets the above requirements will be deemed a "qualifying employee drug testing program". For the purposes of this section, an employee is a "subject employee" only if that employee will be working on the project job site.

(B) CM/GC shall require each Subcontractor providing labor for the Project to

i. require that the Subcontract's subject employees participate in a drug testing policy that meets or exceeds requirements of 5 A (above).

C.3.2 Pursuant to PPS-49-0200 (reference ORS 279C.515), and as a condition to District's performance hereunder, CM/GC agrees:

(1) If District becomes aware that CM/GC has failed, neglected or refused to make prompt payment of any claim for labor or services furnished to the CM/GC or a Subcontractor by any person in connection with the project as such claim becomes due, the proper officer(s) representing the District may pay the claim and charge the amount of the payment against funds due or to become due CM/GC under this Contract within ten (10) business days written notice to CM/GC. Payment of claims in this manner shall not relieve the CM/GC or the CM/GC's surety from obligation with respect to any unpaid claims. Notwithstanding any other remedies available to the District,

(2) If the CM/GC or a first-tier Subcontractor fails, neglects or refuses to make payment to a person furnishing labor or materials in connection with the public contract for a public improvement within thirty (30) Days after receipt of payment from District or a CM/GC, the CM/GC or first-tier Subcontractor shall owe the person the amount due plus interest charges commencing at the end of the 10-Day period that payment is due under PPS-49-0200(c)(R) (reference ORS 279C.580(3)) and ending upon final payment, unless payment is subject to a good faith dispute as defined in PPS-49-0200(c)(R) (reference ORS 279C.580). The rate of interest charged to the CM/GC or first-tier Subcontractor on the amount due shall equal three times the discount rate on 90-Day commercial paper in effect at the Federal Reserve Bank in the Federal Reserve district that includes Oregon on the date that is thirty (30) Days after the date when payment was received from District or from the CM/GC, but the rate of interest shall not exceed thirty (30) percent. The amount of interest may not be waived.

(3) If the CM/GC or a Subcontractor fails, neglects or refuses to make payment to a person furnishing labor or materials in connection with the Contract, the person may file a complaint with the Construction CM/GCs Board, unless payment is subject to a good faith dispute as defined in PPS-49-0200(c)(R) (reference ORS 279C.580). Every contract related to this Contract shall contain a similar clause.

C.3.3 Pursuant to PPS-49-0200(M) (reference ORS 279C.545) Construction workers employed by the CM/GC or its Subcontractor will be foreclosed from the right to collect for any overtime under this Contract unless a claim for payment is filed with the CM/GC or Subcontractor within 90 days from the completion of the Contract, providing the CM/GC or Subcontractor has:

(1) Caused a circular clearly printed in blackface pica type and containing a copy of this section to be posted in a prominent place alongside the door of the timekeeper's office or in a similar place which is readily available and freely visible to any or all workers employed on the Work, and

(2) Maintained such circular continuously posted from the inception to the completion of the Contract on which workers are or have been employed.

C.3.4 Pursuant to PPS-49-0200(c)(R) (reference ORS 279C.580), CM/GC shall include in each subcontract for property or services entered into by the CM/GC and a first-tier Subcontractor, including a material supplier, for the purpose of performing a construction contract:

(1) A payment clause that obligates the CM/GC to pay the first-tier Subcontractor for satisfactory performance under its subcontract within ten (10) Days out of such amounts as are paid to the CM/GC by District under the Contract;

(2) An interest penalty clause that obligates the CM/GC if payment is not made within thirty (30) Days after receipt of payment from District, to pay to the first-tier Subcontractor an interest penalty on amounts due in the case of each payment not made in accordance with the payment clause included in the subcontract pursuant to paragraph (a) of this subsection. CM/GC or first-tier Subcontractor shall not be obligated to pay an interest penalty if the only reason that the CM/GC or first-tier Subcontractor did not make payment when payment was due is that the CM/GC or first-tier Subcontractor did not receive payment from District or CM/GC when payment was due. The interest penalty shall be for the period beginning on the day after the required payment date and ending on the date on which payment of the amount due is made; and shall be computed at the rate specified in ORS 279C.515(2).

(3) A clause which requires each of CM/GC's Subcontractor's to include, in each of their contracts with lower-tier Subcontractors or suppliers, provisions to the effect that the first-tier Subcontractor shall pay its lower-tier Subcontractors and suppliers in accordance with the provisions of subsections (a) and (b), above and requiring each of their Subcontractors and suppliers to include such clauses in their subcontracts and supply contracts.

C.3.5 All employers, including CM/GC, that employ subject workers who work under this contract in the State of Oregon shall comply with ORS 656.017 and provide the required Workers' Compensation coverage, unless such employers are exempt under ORS 656.126. CM/GC shall ensure that each of its Subcontractors complies with these requirements.

C.4 PAYMENT FOR MEDICAL CARE

Pursuant to PPS-49-0200(c)(J) (reference ORS 279C.530), and as a condition to District's performance hereunder, CM/GC shall promptly, as due, make payment to any person, partnership, association or corporation furnishing medical, surgical, and hospital care or other needed care and attention, incident to sickness or injury, to the employees of such CM/GC, all sums of which the CM/GC agrees to pay for such services and all moneys and sums which the CM/GC has collected or deducted from the wages of personnel pursuant to any law, contract or agreement for the purpose of providing or paying for such services.

C.5 HOURS OF LABOR

As a condition to District's performance hereunder, CM/GC shall comply with ORS 279C.520 and 279C.540, as amended from time to time and incorporated herein by this reference:

Pursuant to PPS-49-0140(3) except as otherwise provided in an applicable collective bargaining agreement with a labor organization, CM/GC shall not employ and shall require that its Subcontractors not employ any person to perform construction work for more than ten hours in any one day, or 40 hours in any one week, except in cases of necessity, emergency, or where the public policy absolutely requires it, and in such cases, except in cases of Contracts for personal services as defined in ORS 279A.055, the laborer shall be paid at least time and a half pay:

(1) For all overtime in excess of eight (8) hours a day or forty (40) hours in any one week when the work week is five consecutive Days, Monday through Friday; and

(2) For all overtime in excess of ten (10) hours a day or forty (40) hours in any one week when the work week is four consecutive Days, Monday through Friday; and

(3) For all Work performed on Saturday and on any legal holiday specified in any applicable collective bargaining agreement or ORS 279C.540(1)(b).

(4) The requirement to pay at least time and a half for all overtime worked in excess of 40 hours in any one week shall not apply to individuals who are excluded under ORS 653.010 to 653.261 or under 29 U.S.C. Section 201 to 209 from receiving overtime. CM/GC shall and shall require its Subcontractors to give notice in writing to their employees who work under this Contract, either at the time of hire or before commencement of Work on the Contract, or by posting a notice in a location frequented by employees, of the number of hours per day and days per week that the employees may be required to work.

This Section C.5 shall not excuse CM/GC from completion of the Work within the time required under this Contract.

C.6 PAY EQUITY; EMPLOYEE DISCUSSIONS OF RATE OF PAY OR BENEFITS

CM/GC shall comply with ORS 279C.520(1)(b) and (c):

(1) CM/GC shall comply with ORS 652.220 (Prohibition of discriminatory wage rates based on sex; employer not to discriminate against employee who is a complainant). Compliance is a material element of the Contract. Failure to comply is a breach that entitles the District to terminate the contact for cause.

(2) CM/GC may not prohibit any of the CM/GC 's employees from discussing the employee's rate of wage, salary, benefits or other compensation with another employee or another person, and may not retaliate against an employee who does so.

SECTION D
CHANGES IN THE WORK

D.1 CHANGES IN WORK

D.1.1 The terms of this Contract shall not be waived, altered, modified, supplemented or amended in any manner whatsoever without prior written approval of the District's Authorized Representative, and then only in a manner consistent with the Change Order provisions of this Section D.1 and after any necessary approvals required by public contracting laws have been obtained. Otherwise, a formal contract amendment is required, which shall not be effective until its execution by the parties to this Contract and all approvals required by public contracting laws have been obtained. Documentation of the proposed change must include: Unit breakdown of the labor and material, applicable allowances, mark-ups, overhead & profit, taxes, freight, and other direct costs.

D.1.2 It is mutually agreed that changes in Plans, quantities, or details of construction are inherent in the nature of construction and may be necessary or desirable during the course of construction. Within the general scope of this Contract, the District's Authorized Representative may at any time, without notice to the sureties and without impairing the Contract, require changes consistent with this Section D.1. All Change Order Work shall be executed under the conditions of the Contract Documents. Such changes may include, but are not limited to:

(1) Modification of specifications and design.

(2) Increases or decreases in quantities.

(3) Increases or decreases to the amount of Work.

(4) Addition or elimination of any Work item.

(5) Change in the duration of the project.

(6) Acceleration or delay in performance of Work.

(7) Deductive changes.

Subcontractor buy out will not be considered a change in work. Change order mark ups shall only apply to material changes in the contract documents.

Deductive changes are those that reduce the scope of the Work, and shall be made by mutual agreement whenever feasible. In cases of suspension or partial termination under Section J, District reserves the right to unilaterally impose a deductive change and to self-perform such Work, for which the provisions of B.13 (District's Right to Do Work) shall then apply.

Adjustments in compensation shall be made under the provisions of D.1.3, in which costs for deductive changes shall be based upon a Direct Costs adjustment together with the related percentage markup specified for profit, Overhead and other Indirect costs, unless otherwise agreed to by Owner.

When a CM/GC considers that the District has effected or may effect a change in the Contract that has not been Identified as such in writing and signed by the District, it is necessary that the CM/GC notify the District in writing as soon as possible. This will permit the District to evaluate the alleged change and:

(1) Confirm that it is a change, direct the mode of further performance, and plan for its funding;

(2) Countermand the alleged change; or

(3) Notify the CM/GC that no change is considered to have occurred.

D.1.3 The District and CM/GC agree that adjustments to or deletions from the Work shall be administered and compensated according to the following:

(1) *Unit pricing* may be utilized at the District's option when unit prices or solicitation alternates were provided that established the cost for adjustments to Work, and a binding obligation exists under the Contract on the parties covering the terms and conditions of the adjustment to Work.

(2) If the District elects not to utilize unit pricing, or in the event that unit pricing is not available or appropriate, *fixed pricing* may be used for adjustments to or deletions from the Work. In fixed pricing the basis of payments or total price shall be agreed upon in writing between the parties to the Contract, and shall be established before the Work is started whenever feasible. Notwithstanding the foregoing, the mark-ups set forth in D.1.3(3) shall be utilized in establishing fixed pricing, and such mark-ups shall not be exceeded Cost and price data relating to adjustments to or deletions from the Work shall be supplied by the CM/GC to District upon request, but District shall be under no obligation to make such requests.

(3) In the event that unit pricing and fixed pricing are not utilized, then adjustments to or deletions from the Work shall be performed on a *cost reimbursement* basis for Direct Costs. Such Work shall be compensated on the basis of the actual, reasonable and allowable cost of labor, equipment, and material furnished on the Work performed. In addition, the following markups shall be added to the CM/GC's or Subcontractor's Direct Costs as full compensation for profit, Overhead and other indirect costs for Work directly performed with the CM/GC's or Subcontractor's own forces:

On Labor.....	15%
On Equipment.....	10%
On Materials.....	10%

Total mark up for multi-tier Subcontracts shall not exceed 20%. Payments made to the CM/GC shall be complete compensation for Overhead, profit, and all costs that were incurred by the CM/GC or by other forces furnished by the CM/GC, including Subcontractors, for adjustments to or deletions from the Work pursuant to a Change Order. District may establish a maximum cost for additional Work under this Section D.1.3, which shall not be exceeded for reimbursement without additional written authorization from District in the form of a Change Order. CM/GC shall not be required to complete such additional Work without additional authorization.

D.1.4 Any necessary adjustment of Contract Time that may be required as a result of a Change Request must be agreed upon by the parties before the execution of the Change Order unless District's Authorized Representative authorizes CM/GC to start the Work before agreement on Contract Time adjustment. CM/GC shall submit any request for additional compensation (and additional Contract Time if CM/GC was authorized to start Work before an adjustment of Contract Time was approved) as soon as possible but no later than thirty (30) Days after receipt of the Change Request. If CM/GC's request for additional compensation or adjustment of Contract Time is not made within the thirty (30) day time limit, CM/GC's requests pertaining to that change are barred. The thirty (30) day time limit for making requests shall not be extended for any reason, including without limitation CM/GC's claimed inability to determine the amount of additional compensation or adjustment of Contract Time, unless an extension is granted in writing by District. If the District's Authorized Representative denies CM/GC's request for additional compensation or adjustment of Contract Time, CM/GC may proceed to file a Claim under Section D.3, Claims Review Process. No other reimbursement, compensation, or payment will be made, except as provided in Section D.1.5 for impact claims.

D.1.5 If any Change Order Work under Section D.1.3 causes an increase or decrease in the CM/GC's cost of, or the Contract Time required for the performance of, any other part of the Work under this Contract, the CM/GC must submit a written request to the District's Authorized Representative, setting forth the nature and specific extent of the request, including all time and cost impacts against the Contract as soon as possible, but no later than thirty (30) Days after receipt of the Change Request by CM/GC.

The thirty (30) day time limit applies to claims of Subcontractors, suppliers, or manufacturers that may be affected by the Change Order and that request additional compensation or an extension of Contract Time to perform; CM/GC has responsibility for contacting its Subcontractors, suppliers, or manufacturers within the thirty (30) day time limit, and including their requests with CM/GC's requests. If the request involves Work to be completed by Subcontractors, or materials to be furnished by suppliers or manufacturers, such requests shall be submitted to the CM/GC in writing with full analysis and justification for the compensation and additional Contract Time requested. The CM/GC will analyze and evaluate the merits of the requests submitted by Subcontractors, suppliers, and manufacturers to CM/GC prior to including those requests and CM/GC's analysis and evaluation of those requests with CM/GC's requests for additional compensation or Contract Time that CM/GC submits to the District's Authorized Representative. Failure of Subcontractors, suppliers, manufacturers or others to submit their requests to CM/GC for inclusion with CM/GC's requests submitted to District's Authorized Representative within the time period and by the means described in this section shall constitute a waiver of these Subcontractor claims. The District's Authorized Representative and the District will not consider direct requests or claims from Subcontractors, suppliers, manufacturers or others not a party to this Contract. The consideration of such requests and claims under this section does not give any person, not a party to the Contract the right to bring a claim against the State of Oregon, whether in this claims process, in litigation, or in any dispute resolution process.

If the District's Authorized Representative denies the CM/GC's request for additional compensation or an extension of Contract Time, the CM/GC may proceed to file a Claim under Section D.3, Claims Review Process.

D.1.6 No request or Claim by the CM/GC for additional costs or an extension of Contract Time shall be allowed if made after receipt of final payment application under this Contract. CM/GC agrees to submit its final payment application within sixty (60) business days after Substantial Completion, unless written extension is granted by District. CM/GC shall not delay final payment application for any reason, including without limitation nonpayment of Subcontractors, suppliers, manufacturers or others not a party to this Contract, or lack of resolution of a dispute with District or any other person of matters arising out of or relating to the Contract. If CM/GC fails to submit its final payment application within sixty (60) business days after Substantial Completion, and CM/GC has not obtained written extension by District, all requests or Claims for additional costs or an extension of Contract Time shall be waived.

D.1.7 It is understood that changes in the Work are inherent in construction of this type. The number of changes, the scope of those changes, and the effect they have on the progress of the original Work cannot be defined at this time. The CM/GC is notified that numerous changes may be required and that there will be no compensation made to the CM/GC directly related to the number of changes. Each change will be evaluated for extension of Contract Time and increase or decrease in compensation based on its own merit.

D.2 DELAYS

D.2.1 Delays in construction include "Avoidable Delays", which are defined in Section D.2.1(1), and "Unavoidable Delays", defined in Section D.2.1(2). Further, "Concurrent Delays" are defined in Section D.2.1(3) and "Offsetting Delays" defined in Section D.2.1(4).

(1) Avoidable Delays include any delays that could have been avoided by the exercise of care, prudence, foresight, and diligence on the part of the CM/GC or its Subcontractors.

(2) Unavoidable Delays include delays other than Avoidable Delays that are:

(A) Caused by any site conditions which differ materially from what was represented in the Contract Documents or from conditions that would normally be expected to exist and be inherent to the construction activities defined in the Contract Documents. The CM/GC shall notify the District's Authorized Representative immediately of differing site conditions before the area has been disturbed. The District's Authorized Representative will investigate the area and make a determination as to whether or not the conditions differ materially from either the conditions stated in the Contract Documents or those which could reasonably be expected in execution of this particular Contract. If CM/GC and the District's Authorized Representative agree that a differing site condition exists, any additional compensation or additional Contract Time will be determined based on the process set forth in Section D.1.5 for Change Order Work. If the District's Authorized Representative disagrees that a differing site condition exists and denies CM/GC's request for additional compensation or Contract Time, CM/GC may proceed to file a Claim under Section D.3, Claims Review Process.

(B) Caused by Force Majeure acts, events or occurrences that could not have been avoided by the exercise of care, prudence, foresight, and diligence on the part of the CM/GC or its Subcontractors.

(C) Caused by adverse weather conditions. Any adverse weather conditions must be substantiated by documentary evidence that weather conditions were abnormal for the specific time period claimed, could not have been anticipated by the CM/GC, and adversely impacted the project in a manner that could not be avoided by rescheduling the Work or by implementing measures to protect against the weather so that the Work could proceed. A 20 day Weather Delay scheduling activity will be included in the Contract Schedule to mitigate weather delays that meet contract definition of weather delay to be used at the agreement of the CM/GC and Owner. The Office of the Environmental Data Service of the National Oceanic and Atmospheric Administration of the U.S. Department of Commerce nearest the project site shall be considered the official agency of record for weather information. The CM/GC may submit a request for a weather delay, for review and consideration by the District, for weather that causes 1) the District to issue District Headquarter closures, 2) weather that does not allow materials, related to a critical path activity, to be installed per the manufacturer's requirements, or 3) weather conditions jeopardize the safety of project personnel.

(3) Concurrent Delays occur when more than one Avoidable or Unavoidable Delay occur within a time frame where all or part of their durations overlap. The cumulative effect of the overlapping delays results in a total impact to the Project duration less than or equal to the cumulative sum of the individual delays or greater than or equal to the longer of the two Delays.

(4) Offsetting Delays occur when an Avoidable and/or an Unavoidable Delay occur within a time frame where all or part of their durations overlap. In some cases, Offsetting Delays occur where overlapping delays are incurred by both the District and the CM/GC, where the period of overlapping time negates any impact to the Project from the delays during that time frame. The impact of the overlap is that the total impact of the delays is lessened due to the delays happening at, to some extent, the same time and therefore the project is only impacted once. The overall impact of Offsetting Delays is equal to or less than the impact of the longer of the two delays.

D.2.2 Except as otherwise provided in ORS 279C.315, CM/GC shall not be entitled to additional compensation or additional Contract Time for Avoidable Delays.

D.2.3 In the event of Unavoidable Delays, based on principles of equitable adjustment, CM/GC may be entitled to the following:

(1) CM/GC may be entitled to additional compensation or additional Contract Time, or both, for Unavoidable Delays described in Section D.2.1.

(2) CM/GC may be entitled to additional Contract Time for Unavoidable Delays described in Section D.2.1.

(3) In the event of any requests for additional compensation or additional Contract Time, or both, as applicable, arising under this Section D.2.3 for Unavoidable Delays, other than requests for additional compensation or additional Contract Time for differing site conditions for which a review process is established under Section D.2.1, CM/GC shall submit a written notification of the delay to the District's Authorized Representative within five (5) Days of the occurrence of the cause of the delay. This written notification shall state the cause of the potential delay, the project components impacted by the delay, how the delay impacts the project's critical path, an analysis of whether the critical path can be revised to recover or partially recover the delay, and the anticipated additional Contract Time or the additional compensation, or both, as applicable, resulting from the delay. Within seven (7) Days after the cause of the delay has been mitigated, or in no case more than thirty (30) Days after the initial written notification, the CM/GC shall submit to the District's Authorized Representative, a complete and detailed request and justification for additional compensation or additional Contract Time, or both, as applicable, resulting from the delay. If the District's Authorized Representative denies CM/GC's request for additional compensation or adjustment of Contract Time, the CM/GC may proceed to file a Claim under Section D.3, Claims Review Process.

(4) If CM/GC does not timely submit the notices required under this Section D.2., then unless otherwise prohibited by law, CM/GC's Claim shall be barred.

D.2.4 When submitting a request for compensation under D.2.3, CM/GC and the District shall take into account the cumulative impacts of Concurrent and Offsetting Delays that occurs within the same time frame the request for compensation covers.

D.2.5 All requests for compensation under this section shall require the CM/GC to submit a detailed Time Impact Analysis as outlined in the Specifications.

D.3 CLAIMS REVIEW PROCESS

D.3.1 All CM/GC Claims shall be referred to the District's Authorized Representative for review. CM/GC's Claims, including Claims for additional compensation or additional Contract Time, shall be submitted in writing by CM/GC to the District's Authorized Representative within five (5) business days after a denial of CM/GC's initial request for an adjustment of Contract terms, payment of money, extension of Contract Time or other relief, provided that such initial request has been submitted in accordance with the requirements and within the time limits established in these General Conditions. Within twenty (20) business days after the initial Claim, CM/GC shall submit to the District's Authorized Representative, a complete and detailed description of the Claim (the "Detailed Notice") that includes all information required by Section D.3.2. Unless the Claim is made in accordance with these time requirements, it shall be waived.

D.3.2 The Detailed Notice of the Claim shall be submitted in writing by CM/GC and shall include a detailed, factual statement of the basis of the Claim, pertinent dates, Contract provisions which support or allow the Claim, reference to or copies of any documents which support the Claim, the dollar value of the Claim, and the Contract Time extension requested for the Claim. If the Claim involves Work to be completed by Subcontractors, the CM/GC will analyze and evaluate the merits of the Subcontractor claim prior to forwarding it and that analysis and evaluation to the District's Authorized Representative. The District's Authorized Representative and the District will not consider direct claims from Subs, suppliers, manufacturers, or others not a party to this Contract. CM/GC agrees that it will make no agreement, covenant, or assignment, nor will it commit any other act that will permit or assist any Subcontractor, supplier, manufacturer, or other to directly or indirectly make a claim against District.

D.3.3 The District's Authorized Representative will review all Claims and take one or more of the following preliminary actions within ten (10) business days of receipt of the Detailed Notice of a Claim: (1) request additional supporting information from the CM/GC; (2) inform the CM/GC and District in writing of the time required for adequate review and response; (3) reject the Claim in whole or in part and identify the reasons for rejection; (4) based on principles of equitable adjustment, recommend approval of all or part of the Claim; or (5) propose an alternate resolution.

D.3.4 The District's Authorized Representative's decision shall be final and binding on the CM/GC unless appealed by written notice to the District within fifteen (15) business days of receipt of the decision. The CM/GC must present written documentation supporting the Claim within fifteen (15) business days of the notice of appeal. After receiving the appeal documentation, the District shall review the materials and render a decision within twenty (20) business days after receiving the appeal documents. All appeals of decisions made by the District's Authorized Representative will be reviewed by the Executive Director of the Office of School Modernization.

D.3.5 The decision of the District shall be final and binding unless the CM/GC delivers to the District its requests for mediation, which shall be a non-binding process, within ten (10) business days of the date of the District's decision. The mediation process will be considered to have commenced as of the date the CM/GC delivers the request. Both parties acknowledge and agree that participation in mediation is a prerequisite to commencement of litigation of any disputes relating to the Contract. Both parties further agree to exercise their best efforts in good faith to resolve all disputes within forty (40) business days of the commencement of the mediation through the mediation process set forth herein.

In the event that a lawsuit must be filed within this forty (40) day period in order to preserve a cause of action, the parties agree that notwithstanding the filing, they shall proceed diligently with the mediation to its conclusion prior to actively prosecuting the lawsuit, and shall seek from the Court in which the lawsuit is pending such stays or extensions, including the filing of an answer, as may be necessary to facilitate the mediation process. Further, in the event settlements are reached on any issues through mediation, the parties agree to promptly submit the appropriate motions and orders documenting the settlement to the Court for its signature and filing.

D.3.6 The mediator shall be an individual mutually acceptable to both parties, but in the absence of agreement each party shall select a temporary mediator and the temporary mediators shall jointly select the permanent mediator. Each party shall pay its own costs for the time and effort involved in mediation. The cost of the mediator shall be split equally between the two parties. Both parties agree to exercise their best effort in good faith to resolve all disputes in mediation. Participation in mediation is a mandatory requirement of both the District and the CM/GC. The schedule, time and place for mediation will be mutually acceptable, or, failing mutual agreement, shall be as established by the mediator. The parties agree to comply with District's administrative rules governing the confidentiality of mediation, if any, and shall execute all necessary documents to give effect to such confidentiality rules. In any event, the parties shall not subpoena the mediator or otherwise require the mediator to produce records, notes or work product, or to testify in any future proceedings as to information disclosed or representations made in the course of mediation, except to the extent disclosure is required by law.

D.3.7 Unless otherwise directed by District's Authorized Representative, CM/GC shall proceed with the Work while any Claim of CM/GC is pending, including a Claim for additional compensation or additional Contract Time resulting from Change Order Work. Regardless of the review period or the final decision of the District's Authorized Representative, the CM/GC shall continue to diligently pursue the Work as identified in the Contract Documents. In no case is the CM/GC justified or allowed to cease Work without a written stop work order from the District or District's Authorized Representative.

SECTION E
PAYMENTS

E.1 SCHEDULE OF VALUES

The CM/GC shall submit, at least ten (10) business days prior to submission of its first application for progress payment, a schedule of values ("Schedule of Values") for the contracted Work, for the District's review and approval. This schedule will provide a breakdown of values for the contracted Work and will be the basis for progress payments. The breakdown will demonstrate reasonable, identifiable, and measurable components of the Work. Unless objected to by the District's Authorized Representative, this schedule shall be used as the basis for reviewing CM/GC's applications for payment. If objected to by District's Authorized Representative, CM/GC shall revise the schedule of values and resubmit the same for approval of District's Authorized Representative.

E.1.1 The Schedule of Values shall be of sufficient detail and organization to interface with the District's accounting and funding structure.

E.2 APPLICATIONS FOR PAYMENT

E.2.1 District shall make progress payments on the Contract monthly as Work progresses. Prior to the submission of each monthly Application for Payment, CM/GC shall submit and obtain District's approval of a progress schedule update. Payments shall be based upon estimates of Work completed, as indicated in the approved progress schedule update, and the Schedule of Values. All payments shall be approved by the District's Authorized Representative. A progress payment shall not be considered acceptance or approval of any Work or waiver of any defects therein. District shall pay to CM/GC interest on the progress payment, not including retainage, due the CM/GC. The interest shall commence thirty (30) Calendar Days after the receipt of invoice ("application for payment") from the CM/GC or fifteen (15) Calendar Days after the payment is approved by the District's Authorized Representative, whichever is the earlier date. The rate of interest shall be equal to the that established in PPS-49-0840 Notwithstanding the foregoing, in instances when an application for payment is filled out incorrectly, or when there is any defect or impropriety in any submitted application or when there is a good faith dispute, District shall so notify the CM/GC within ten (10) business days stating the reason or reasons the application for payment is defective or improper or the reasons for the dispute. A defective or improper application for payment, if corrected by the CM/GC within five (5) business days of being notifled by the District, shall not cause a payment to be made later than specified in this section unless interest is also paid. If the defective or improper application for payment is not corrected by the CM/GC within five (5) business days after notification, the District will reject the application for payment for these reasons and the CM/GC will then be required to resubmit the corrected application for payment with a new application number. Accrual of interest will be postponed when payment on the principal is delayed because of disagreement between the District and the CM/GC.

E.2.2 CM/GC shall submit to the District's Authorized Representative, an application for each payment and, if required, receipts or other vouchers showing payments for materials and labor, including payments to Subcontractors. Applications for payment shall include all information required by District or District's Authorized representative and shall be supplemented with all additional information requested before the request for payment will be processed. CM/GC shall include, in its application for payment, a schedule of the percentages of the various parts of the Work completed, based on the Schedule of Values which shall aggregate to the payment application total.

E.2.3 Generally, applications for payment will be accepted only for materials that have been installed. Under special conditions, applications for payment for stored materials will be accepted at District's sole discretion. Such a payment, if made, will be subject to the following conditions:

(1) The request for stored material shall be submitted at least twenty five (25) business days in advance of the application for payment on which it appears. Applications for payment shall be entertained for major equipment, components or expenditures only.

(2) The CM/GC shall submit applications for payment showing the quantity and cost of the material stored. The application for payment will include the address of the bonded warehouse where the materials are being stored, the location identification inside the warehouse, any warehouse location identification number associated with the stored materials, and photos showing the materials in the warehouse.

(3) The material shall be stored in a bonded warehouse and District's Authorized Representative shall be granted the right to access the material for the purpose of removal or inspection at any time during the Contract Period.

(4) Payments shall be made for materials only as part of a line item on the schedule of values. The submitted amount of the application for payment shall be reduced by the cost of transportation and for the cost of an inspector to check the delivery at out of town storage sites. The cost of storage and said inspection shall be borne solely by the CM/GC.

(5) Within fifty (50) Business Days of the application for payment, the CM/GC shall submit evidence of payment covering the material stored.

(6) Payment for stored materials shall in no way indicate acceptance of the materials or waive any rights under this Contract for the rejection of the Work or materials not in conformance with the Contract Documents.

(7) All required documentation must be submitted with the respective application for payment.

E.2.4 Notwithstanding other parts of this Contract, the District reserves the right to withhold all or part of a payment, or may nullify in whole or part any payment previously made, to such extent as may be necessary in the District's opinion to protect the District from loss including but not limited to:

(1) Work that is defective and not remedied, or that has been demonstrated or identified as faillng to conform with the Contract Documents,

(2) third party claims or fines, including governing agency or regulatory entity, filed or evidence reasonably indicating that such claims will likely be filed unless security acceptable to the District is provided by the CM/GC;

(3) failure of the CM/GC to make payments properly to Subcontractors or for labor, materials or equipment (in which case District may issue checks made payable jointly to District and such unpaid persons under this provision, or directly to Subcontractors and suppliers at any level under Section C.3.2(1));

(4) reasonable evidence that the Work cannot be completed for the unpaid balance of the Contract Price;

(5) damage to the Distrlct or another contractor;

(6) reasonable evidence that the Work will not be completed within the Contract Time required by the Contract, and that the unpaid balance would not be adequate to cover actual or liquidated damages for the anticipated delay;

(7) failure to carry out the Work in accordance with the Contract Documents;

(8) failure to provide or obtain District's approval of a monthly progress schedule update;

(9) failure to maintain updated Record Documents;

(10) failure to provide certified payroll reports as required elsewhere in this Contract

E.2.5 CM/GC's applications for payment may not include requests for payment for portions of the Work for which the CM/GC does not intend to pay to a Subcontractor or material supplier.

E.2.6 The CM/GC warrants to District that title to all Work covered by an application for payment will pass to the District no later than the time of payment. The CM/GC further warrants that upon submittal of an application for payment all Work for which payments are received from the District shall be free and clear of liens, claims, security interests or encumbrances in favor of the CM/GC, Subcontractors, material suppliers, or other persons or entities making a claim by reason of having provided labor, materials and equipment relating to the Work.

E.2.7 If CM/GC disputes any determination by District's Authorized Representative with regard to any appllcation for payment, CM/GC nevertheless shall continue to prosecute expeditiously the Work. No payment made hereunder shall be or be construed to be final acceptance or approval of that portion of the Work to which such partial payment relates or shall relieve CM/GC of any of its obligations hereunder.

E.2.8 The CM/GC will reconcile payment amounts to actual costs for General Conditions and self-performed work on a monthly basis. Adjustments to the pay applications will be made to reflect actual allowable contract costs incurred.

E.3 PAYROLL CERTIFICATION REQUIREMENT

Payroll certification is required before payments are made on the Contract. Refer to Section C.2 for this information.

E.4 RESERVED

E.5 RETAINAGE

E.5.1 Retainage shall be withheld and released in accordance with PPS-49-0140(3) (reference ORS 279C.550 to 279C.580):

(1) District may reserve as retainage from any progress payment an amount not to exceed five percent (5%) of the payment. As Work progresses, District may reduce the amount of the retainage and may eliminate retainage on any remaining monthly Contract payments after 50 percent of the Work under the Contract is completed if, in the District's sole opinion, such Work is progressing satisfactorily. Elimination or reduction of retainage shall be allowed only upon written application by the CM/GC, which application shall include written approval of CM/GC's surety; except that when the Work is 97-1/2 percent completed the District may, at its discretion and without application by the CM/GC, reduce the retained amount to 100 percent of the value of the Work remaining to be done. Upon receipt of written application by the CM/GC, District shall respond in writing within a reasonable time.

(2) In accordance with the provisions of PPS-49-0140(3) (reference ORS 279C.560) and any applicable administrative rules, CM/GC may request in writing:

(A) to be paid amounts which would otherwise have been retained from progress payments where CM/GC has deposited acceptable bonds and securities of equal value with District or in a custodial account or other mutually-agreed account satisfactory to District, with an approved bank or trust company to be held in lieu of the cash retainage for the benefit of District;

(B) that retainage be deposited in an interest bearing account, established through the State Treasurer for state agencies, in a bank, savings bank, trust company or savings association for the benefit of District, with earnings from such account accruing to the CM/GC; or

(C) that the District allow CM/GC to deposit a surety bond for the benefit of District, in a form acceptable to District, in lieu of all or a portion of funds retained, or to be retained. Such bond and any proceeds therefrom shall be made subject to all claims and liens in the manner and priority as set forth for retainage under PPS-49-0140(3) (reference ORS 279C.550 to ORS 279C.625).

(D) Where the District has accepted the CM/GC's election of option (A) or (B), District may recover from CM/GC any additional costs incurred through such election by reducing CM/GC's final payment. Where the District has agreed to CM/GC's request for option (C), CM/GC shall accept like bonds from Subcontractors and suppliers on the project from which CM/GC has required retainages.

(3) The retainage held by District shall be included in and paid to the CM/GC as part of the final payment of the Contract Price. The District shall pay to CM/GC interest at the rate of one and one-half percent per month on the final payment due CM/GC, interest to commence thirty (30) Calendar Days after the Work under the Contract has been completed, accepted and invoiced in accordance with the terms of this Agreement. CM/GC shall notify District In writing when the CM/GC considers the Work complete and District shall, within fifteen (15) Calendar Days after receiving the written notice, either accept the Work or notify the CM/GC of Work yet to be performed on the Contract. If District does not within the time allowed notify the CM/GC of Work yet to be performed to fulfill contractual obligations, the interest provided by this subsection shall commence to run thirty (30) Calendar Days after the end of the 15-Day period.

(4) In accordance with the provisions of PPS-49-0200(1)(c)(P) (reference ORS 279C.560), District shall reduce the amount of the retainage if the CM/GC notifies the controller of the District that the CM/GC has deposited in an escrow account with a bank or trust company, in a manner authorized by the District's Authorized Representative, bonds and securities of equal value of a kind approved by the District's Authorized Representative.

E.5.2 As provided in subsections C.2.2 and C.2.3, retainage in the amount of 25% of amounts earned shall be withheld and released in accordance with PPS-49-0820(6) (reference ORS 279C.845(7)) when the CM/GC fails to file certified statements as required by section C.2.1 shall be in addition to any retainage withheld as a part of this Section E.5.

E.6 FINAL PAYMENT

E.6.1 Upon completion of all the Work under this Contract, the CM/GC shall notify the District's Authorized Representative, in writing, that CM/GC has completed CM/GC's part of the Contract and shall request final payment. Upon receipt of such notice the District's Authorized Representative will inspect the Work, and if acceptable, submit to the District a recommendation as to acceptance of the completed Work and as to the final estimate of the amount due the CM/GC. If the Work is not acceptable, District will notify CM/GC within fifteen (15) Days of CM/GC's request for final payment. Upon approval of this final estimate by the District and compliance by the CM/GC with provisions in Section K. 3 AFFIDAVIT/RELEASE OF LIENS AND CLAIMS, and other provisions as may be applicable, the District shall pay to the CM/GC all monies due under the provisions of these Contract Documents.

E.6.2 Neither final payment nor any remaining retained percentage shall become due until the CM/GC submits to the District's Authorized Representative, (1) a notarized affidavit/release of liens and claims in a form satisfactory to District that states that payrolls, bills for materials and equipment, and other indebtedness connected with the Work for which the District or the District's property might be responsible or encumbered (less amounts withheld by District) have been paid or otherwise satisfied,(2) a certificate evidencing that insurance required by the Contract Documents to remain in force after final payment is currently in effect and will not be canceled or allowed to expire until at least thirty (30) Days' prior written notice has been given to the District, (3) a written statement that the CM/GC knows of no substantial reason that the insurance will not be renewable to cover the period required by the Contract Documents, (4) consent of surety, if any, to final payment and (5), if required by the District, other data establishing payment or satisfaction of obligations, such as receipts, releases and waivers of liens, claims, security interests or encumbrances arising out of the Contract, to the extent and in such form as may be designated by the District. If a Subcontractor refuses to furnish a release or waiver required by the District, the CM/GC may furnish a bond satisfactory to the District to indemnify the District against such lien. If such lien remains unsatisfied after payments are made, the CM/GC shall refund to the District all money that the District may be compelled to pay in discharging such lien, including all costs and reasonable attorneys' fees.

E.6.3 Acceptance of final payment by the CM/GC, a Subcontractor or material supplier shall constitute a waiver of claims by that payee except those previously made in writing and identified by that payee as unsettled at the time of final application for payment.

SECTION F
JOB SITE CONDITIONS

F.1 USE OF PREMISES

CM/GC shall confine equipment, storage of materials and operation of Work to the limits indicated by Contract Documents, law, ordinances, permits or directions of the District's Authorized Representative. CM/GC shall follow any and all instructions or requirements regarding the use of premises given by the District's Authorized Representative. CM/GC shall not use or disturb District's property, materials or documents except for the purpose of responding to District's request for proposal or invitation to bid or pursuant to completion of the Work under this Contract. CM/GC shall treat all documents as confidential and shall not disclose such documents without approval from District. Any unauthorized disclosure of documents or removal of District property will be deemed a substantial breach of this Contract. CM/GC shall bear sole responsibility for any liability including, but not limited to, attorneys' fees, resulting from any action or suit brought against District as a result of CM/GC's willful or negligent release of information, documents, or property contained in or on District property. District hereby deems all information, documents, and property contained in or on District property privileged and confidential.

F.2 PROTECTION OF WORKERS, PROPERTY, AND THE PUBLIC

F.2.1 CM/GC shall maintain continuous and adequate protection of all of the Work from damage, and shall protect the District's Authorized Representative, District's workers, school staff, administrators, students, general public and property from injury or loss arising in connection with this Contract. CM/GC shall remedy acceptably to the District, any damage, injury, or loss, except such as may be directly due to errors in the Contract Documents or caused by authorized representatives or personnel of the District. CM/GC shall adequately protect adjacent property as provided by law and the Contract Documents. If any person suffers physical injury or property damage arising from the Work, regardless of the cause, the party shall immediately give notice of such injury or damage, whether or not insured, to District and CM/GC with sufficient detail to enable District and any other party affected to investigate the matter.

F.2.2 CM/GC shall take all necessary precautions for the safety of all personnel on the job site, and shall comply with the Contract Documents and all applicable provisions of federal, state and municipal safety laws and building codes to prevent accidents or injury to persons on, about or adjacent to the premises where the Work is being performed. CM/GC shall erect and properly maintain at all times, as required by the conditions and progress of the Work, all necessary safeguards for protection of workers and the public against any hazards created by construction. CM/GC shall designate a responsible employee or associate on the Work site, whose duty shall be the prevention of accidents. The name and position of the person designated shall be reported to the District's Authorized Representative. The District's Authorized Representative has no responsibility for Work site safety. Except as provided in B.2.1, work site safety is solely the responsibility of the CM/GC.

F.2.3 CM/GC shall not enter upon private property without first obtaining permission from the property owner or its duly authorized representative. CM/GC shall be responsible for the preservation of all public and private property along and adjacent to the Work contemplated under the Contract and shall use every precaution necessary to prevent damage thereto. In the event the CM/GC damages any property, the CM/GC shall at once notify the property owner and make, or arrange to make, full restitution. CM/GC shall report, immediately in writing, to the District's Authorized Representative, all pertinent facts relating to such property damage and the ultimate disposition of the claim for damage.

F.2.4 CM/GC is responsible for protection of adjacent work areas including impacts brought about by activities, equipment, labor, utilities, and materials on the site.

F.2.5 CM/GC shall at all times direct its activities In such a manner as to minimize adverse effects on the environment. Handling of all materials will be conducted so no release will occur that may pollute or become hazardous.

F.2.6 In an emergency affecting the safety of life or of the Work or of adjoining property, the CM/GC, without special instruction or authorization from the District's Authorized Representative, shall act reasonably to prevent threatened loss or injury, and shall so act, without appeal, if instructed by the District's Authorized Representative. Any compensation claimed by the CM/GC on account of emergency work shall be determined in accordance with Section D.

F.2.7 CM/GC shall protect and preserve established benchmarks and monuments and shall not change locations of benchmark and monuments without District's or agency having jurisdiction's prior written approval. CM/GC shall replace any benchmark or monument that is lost or destroyed subsequent to proper notification of the District and with the District's approval at CM/GC's sole cost.

F.2.8 Prior to the commencement of the Work, CM/GC shall review the Project site with the District in detail and identify the area of the Work, staging areas, connections or interfacing with existing structures and operations, and restrictions on the Work site area. CM/GC shall ensure that all work forces on the Project Site are instructed about the acceptable working and staging areas and restrictions on use of the site. CM/GC, with advance consent of the District, shall erect such barriers and devices as are necessary to restrict access within the Work site to authorized areas and to prevent unauthorized access to non-Work areas.

F.2.9 Utility Locates: CM/GC will be responsible to locate existing utilities and underground facilities that are indicated in the Contract Documents or that are known or reasonably should be known to exist in the proximity to the Work. CM/GC shall provide timely notice and locate requests with any affected utility or through contact with appropriate notification centers before commencing excavation or demolition Work that CM/GC knows, or reasonably should know, is in proximity to such utilities or facilities. CM/GC assumes the sole risk and will be responsible for all delay and expense arising out of CM/GC's failure to do so.

F.2.10 This Contract and all individual contracts and purchase orders incorporate by this reference District's safety policies current as of the date of commencement of Work, which have been or will be made available to CM/GC. CM/GC shall schedule and attend a preconstruction meeting with District. CM/GC, as a condition to commencement of the Work, shall instruct all personnel of CM/GC and its subcontractors, prior to their performing any of the Work, of the elements of these policies with which the personnel will be required to comply. A copy of the CM/GCs safety program for the project will be submitted as part of the formal submittal process to the District's Authorized Representative for review and comment.

F.2.11 In addition to the policies identified above, CM/GC shall review with all subcontractors the methods, materials, tools, and equipment to be used to verify their compliance with all safety standards and laws and CM/GC shall comply with them, to ensure safe, hazard-free conditions for all persons visiting or working on the entire Project Site and District's adjoining facilities. CM/GC shall implement and maintain a safety program that is specifically adapted for the Project and complies with all applicable requirements of Oregon OSHA. CM/GC shall furnish a copy of the safety program to District before commencing Work.

F.2.12 CM/GC shall maintain good housekeeping practices to reduce the risk of fire damage and shall make a fire extinguisher, fire blanket, and/or fire watch, as applicable, available at each location where cutting, braising, soldering, and/or welding is being performed or where there is an increased risk of fire.

F.2.13 CM/GC shall ensure that all existing or operating systems, utilities, existing on-site services and access avenues are on and in operating condition before leaving the Project Site each day. If any system, utility, or access avenue is not operable, CM/GC shall notify District before CM/GC leaves the Project Site that day.

F.3 CUTTING AND PATCHING

F.3.1 CM/GC shall be responsible for coordinating all cutting, fitting, or patching of the Work to make its several parts come together properly and fit to receive or be received by work of other CM/GCs or Subcontractors shown upon, or reasonably implied by, the Contract Documents.

F.3.2 CM/GC shall be responsible for restoring all cut, fitted, or patched surfaces to an original condition; provided, however, that if a different condition is specified in the Contract Documents, then CM/GC shall be responsible for restoring such surfaces to the condition specified in the Contract Documents.

F.3.3 CM/GC shall not endanger any Work performed by it or anyone else by cutting, excavating, or otherwise altering Work and shall not cut or alter Work of any other contractor except with consent of District.

F.4 CLEANING UP

The CM/GC shall be responsible to maintain a clean and orderly jobsite at all times in order to promote a safe and efficient work environment. Should the jobsite fall into a state of disorder, the District may order the CM/GC to, at its own expense, clean up and remove all refuse and unused materials of any kind resulting from the Work and bring the jobsite to a state of cleanliness and order deemed satisfactory by the District's Representative. If CM/GC fails to do so within twenty-four (24) hours after written notification by the District, the work may be done by others and the cost charged to the CM/GC and deducted from payment due the CM/GC. Any directive by the District's Representative shall not relieve the CM/GC in any way or manner for the safety of the jobsite for construction workers or the public.

F.5 ENVIRONMENTAL CONTAMINATION

F.5.1 CM/GC will be held responsible for and shall indemnify, defend, with counsel agreed upon by both parties whose agreement shall not be unreasonably withheld, and hold harmless District from and against any costs, expenses, damages, claims, and causes of action (including attorney fees), or any of them, resulting from all spills, releases, discharges, leaks and disposal of environmental pollution, including storage, transportation, and handling during the performance of the Contract which occur as a result of, or are contributed by, the negligence or actions of CM/GC or its personnel, agents, or Subcontractors or any failure to perform in accordance with the Contract Documents (except to the extent otherwise void under ORS 30.140), but only to the extent that such costs, expenses, claims, or causes of action result from (1) spills, releases, discharges, or leaks of hazardous substances brought on the project site, or produced on the project site, by CM/GC or its personnel, agents, or subcontractors; or (2) spills, releases, discharges, or leaks resulting from the CM/GC's or its personnel's, agents', or subcontractors' defective work, negligence, recklessness, or failures to perform in accordance with the contract documents. Nothing in this section F.5.1 shall limit CM/GC's responsibility for obtaining insurance coverages required under Section G.3 of these General Conditions, and CM/GC shall take no action that would void or impair such coverages. To the extent Owner or its subcontractors bring hazardous substances to the project site or produce hazardous substances at the project site, the Owner shall indemnify and hold harmless the CM/GC from any such cleanup costs, fines, penalties, or other damages, unless the harm is caused by the CM/GC's, or its personnel's, agents', or subcontractors' defective work, negligence, recklessness, or failure to perform in accordance with the contract documents.

(1) CM/GC agrees to promptly contain, minimize and dispose of such spills, releases, discharge or leaks to the satisfaction of District and proper regulatory agencies in a manner that complies with applicable federal, state, and local laws and regulations. Cleanup shall be at no cost to the District and be performed by properly qualified personnel.

(2) CM/GC shall obtain the District's written consent prior to bringing onto the Work site any (i) environmental pollutants or (ii) hazardous substances or materials, as defined in Section F.6.1. Notwithstanding such written consent from the District, the CM/GC, at all times, shall:

(A) properly handle, label, use and dispose of all environmental pollutants and hazardous substances or materials brought onto the Work site, in accordance with all applicable federal, state, or local statutes, rules, or ordinances;

(B) be responsible for any and all spills, releases, discharges, or leaks of (or from) environmental pollutants or hazardous substances or materials which CM/GC has brought onto the Work site; and

(C) promptly clean up, without cost to the District, such spills, releases, discharges, or leaks to the District's satisfaction and in compliance with all applicable federal, state, or local statutes, rules or ordinances.

(3) With respect to Hazardous Materials to be used during the course of the Work, the CM/GC will implement and enforce a program to inventory and properly store and secure all Hazardous Materials that may be used or present on the Project site, maintain available for inspection at the Project site all material safety data sheets, and comply with all regulations required by law for the storage, use, and disposal of Hazardous Materials. The program must provide for notification of all personnel of potential chemical hazards. Review of these hazards must be included in the CM/GC's safety training program.

F.5.2 CM/GC shall report all reportable quantity releases to applicable federal, state, and local regulatory and emergency response agencies. Reportable quantities are found in 40 CFR Part 302, Table 302.4 for hazardous substances and in OAR Chapter 340 Division 108 for all products addressed therein. Upon discovery, regardless of quantity, CM/GC must telephonically report all releases to the District. A written follow-up report shall be submitted to District within twenty four (24) hours of the telephonic report. Such written report shall contain, as a minimum:

(1) Description of items released (identity, quantity, manifest no., and all other documentation required by law.)

(2) Whether amount of items released is EPA/DEQ reportable, and, if so, when it was reported.

(3) Exact time and location of release, including a description of the area involved.

(4) Containment procedures initiated.

(5) Summary of communications about the release CM/GC has had with members of the press or State officials other than District.

(6) Description of cleanup procedures employed or to be employed at the site, including disposal location of spill residue.

(7) Personnel injuries, if any, resulting from, or aggravated by, the release.

F.6 ENVIRONMENTAL CLEAN-UP

F.6.1 Unless disposition of environmental pollution is specifically a part of this Contract, or was caused by the CM/GC (reference F.5 Environmental Contamination), CM/GC shall immediately notify District of any hazardous substance(s) which CM/GC discovers or encounters during performance of the Work required by this Contract. "Hazardous substance(s)" means any hazardous, toxic and radioactive materials and those substances defined as "hazardous substances," "hazardous materials," "hazardous wastes," "toxic substances," or other similar designations in any federal, state, or local law, regulation, or ordinance, including without limitation asbestos, polychlorinated biphenyl (PCB), or petroleum, and any substances, materials or wastes regulated in 40 CFR, Part 261 and defined as hazardous in 40 CFR S

In addition to notifying District of any hazardous substance(s) discovered or encountered, CM/GC shall immediately cease working in any particular area of the project where a hazardous substance(s) has been discovered or encountered if continued work in such area would present a risk or danger to the health or well-being of CM/GC's or any Subcontractor's work force.

F.6.2 Upon being notified by CM/GC of the presence of hazardous substance(s) on the project site, District shall arrange for the proper disposition of such hazardous substance(s).

F.6.3 Asbestos Abatement. The Work under this Contract may include removal and abatement of asbestos (and proper transportation and disposal). All such Work shall be performed in compliance with the plans and specifications if it is determined that hazardous materials need to be abated. This Work (if required) shall be performed by an asbestos abatement contractor licensed under ORS 468A.720 employing Oregon Certified Asbestos Workers and a Certified Asbestos Supervisor shall be on site at all times asbestos abatement Work is being performed. All federal, state and local laws, statutes, regulations, administrative rules, ordinances, standards, directives and other legal requirements, and all rules and regulations pertaining to the safe removal of asbestos, including but not limited to those of the Oregon Department of Environmental Quality (DEQ), the federal Environmental Protection Agency (EPA), and OSHA, and other authorities having jurisdiction, shall be complied with at all times. CM/GC shall provide District with air sampling records (including clearance sampling documentation) before the commencement of any construction or abatement activities as well as at completion of the asbestos abatement Work. CM/GC shall include these asbestos provisions and requirements in any subcontract(s) related to the asbestos abatement Work.

F.6.4 Lead and Other Hazardous Material Abatement. The Work under this Contract may also include removal and abatement (and proper transportation and disposal) of all other hazardous materials or substances (not covered by Section F.6.3) from the Project site as necessary for full legal compliance, including but not limited to lead. Proper identification, assessment, notifications, handling, testing, certifications, removal, transportation and disposal are the responsibility of CM/GC. All applicable federal, state and local laws, statutes, regulations, administrative rules, ordinances, standards, directives and other legal requirements shall be complied with at all times, including but not limited to those of DEQ, EPA and OSHA. All such Work shall be performed in compliance with the applicable plans and specifications being prepared by the Architect.

F.7 SECURITY AND SCHOOL SITE BEHAVIOR

F.7.1 The CM/GC, its officers, agents and subcontractors, shall comply with District's policies and requirements to obtain, display, and return identification badges at any time while they are present on District's property. As required by schools and other District locations, District may require personnel to sign in before entering District properties.

F.7.2 **Unsupervised Contact with Students; Criminal Background Checks.** This provision is required by statute. "Unsupervised contact" with students means contact that provides the person opportunity and probability for personal communication or touch with students when not under direct supervision by District personnel. ORS 326.603; OAR 581-021-0500.

CHOOSE ONE:

(1) ☐ CM/GC will have no direct, unsupervised contact with students in the performance of this contract.

- CM/GC shall ensure that Contractor, any subcontractors, and their officers, employees, and agents will have no direct, unsupervised contact with students.
- CM/GC will discuss any questions or concerns about these requirements with District Point of Contact (named on the first page of this Contract) before beginning work.
- CM/GC, any subcontractors, and their officers, employees and agents must immediately remove themselves from any situation involving direct, unsupervised contact with students.
- If CM/GC is unable to ensure through a security plan that none of its officers, employees, or agents or those of its subcontractors will have direct, unsupervised contact with students in a particular circumstance or circumstances, then CM/GC shall notify District Point of Contact and undergo a criminal background check before beginning any work that could result is such contact.
- CM/GC must check in at the school office and wear a visitor badge while on District property or in the presence of District students.
- A violation of these provisions is grounds for immediate termination of this Contract by the District.

OR

(2) ☒ Performance under this Contract may require or cause CM/GC to have direct, unsupervised contact with students. As required by ORS 326.603, **CM/GC must undergo a finger-print based criminal background check before beginning work under this Contract.**

- CM/GC authorizes District to obtain information about CM/GC and its history and to conduct a criminal background check, including fingerprinting, of any CM/GC officers, employees, or agents who will have unsupervised contact with students. CM/GC shall cause its employees and/or subcontractors, if any, to authorize District to conduct these background checks.
- CM/GC shall pay all fees assessed by Oregon Department of Education for processing the background check. District may deduct the cost of such fees from a progress or final payment to CM/GC under this Contract, unless CM/GC elects to pay such fees directly.
- After completion of the criminal background check, CM/GC will be provided with a District badge.
- CM/GC must the wear the badge provided by the District while on District property or in the presence of District students.

F.7.3 The CM/GC, its officers, agents, employees, and subcontractors, shall comply with the following District Rules while on District property:

(1) No Smoking. Smoking or other use of tobacco and marijuana is prohibited on all District property.

(2) No use of controlled substances. District's property sites are all designated drug-free zones, which designation is enforced by the Portland Police Bureau.

(3) No Weapons or Firearms. Weapons and firearms are prohibited on District's property.

(4) Conduct will be appropriate for a school site and in accordance with District policies. CM/GC, its officers, agents, employees, and subcontractors, shall not engage in profanity or verbal or physical contact with neighbors, students, or faculty.

(5) Swearing or cursing on District Property is prohibited.

F.7.4 Student Privacy. As required by the Family Educational Rights and Privacy Act, 20 USC 1232(g) ("FERPA"), and ORS 326.565, CM/GC shall not disclose any information or records regarding students or their families that CM/GC may learn or obtain in the course and scope of its performance of this Contract. The parties recognize that FERPA imposes strict penalties for improper disclosure or re-disclosure of confidential student information, including but not limited to denial of access to personally identifiable information from education records for at least five (5) years (34 CFR 99.33(e)). Therefore, consistent with FERPA's requirements, personally identifiable information obtained by CM/GC in the performance of this Contract may not be re-disclosed to third parties without the written consent of the student's parent/guardian and the District and must be used only for the purposes identified in this Contract.

F.8 FORCE MAJEURE

A party to this Contract shall not be held responsible for delay or default due to Force Majeure acts, events or occurrences unless they could have been avoided by the exercise of reasonable care, prudence, foresight, and diligence by that party. The District may terminate this Contract upon written notice after determining that delay or default caused by Force Majeure acts, events or occurrences will reasonably prevent successful performance of the Contract.

SECTION G
INDEMNITY, BONDING, AND INSURANCE

G.1 RESPONSIBILITY FOR DAMAGES / INDEMNITY

G.1.1 CM/GC shall be responsible for all damage to property, injury to persons, and loss, expense, inconvenience, and delay that may be caused by, or result from, the carrying out of the Work to be done under this Contract, or from any act, omission or neglect of the CM/GC, its Subcontractors, personnel, or agents.

G.1.2 To the fullest extent permitted by law, CM/GC shall indemnify, defend (with counsel approved by District) and hold harmless the District, District's Authorized Representative(s), District's third party consultants and contractors working on the Project Site, Architect/Engineer, Architect/Engineer's consultants, and their respective officers, directors, agents, employees, partners, members, stockholders and affiliated companies (collectively "Indemnitees") from and against all liabilities, damages, losses, claims, expenses (including reasonable attorney fees), demands and actions of any nature whatsoever which arise out of, result from or are related to,

(1) any damage, injury, loss, expense, inconvenience or delay described in this Section G.1.2 to the extent that the CM/GC could or should have reasonably prevented it,

(2) any accident or occurrence which happens or is alleged to have happened in or about the project site or any place where the Work is being performed, or in the vicinity of either, at any time prior to the time the Work is fully completed in all respects to the extent that the Contract could or should have reasonably prevented it,

(3) any failure of the CM/GC to observe or perform any duty or obligation under the Contract Documents which is to be observed or performed by the CM/GC, or any breach of any agreement, representation or warranty of the CM/GC contained in the Contract Documents or in any subcontract,

(4) the negligent acts or omissions of the CM/GC, a Subcontractor or anyone directly or indirectly employed by them or any one of them or anyone for whose acts they may be liable, regardless of whether or not such claim, damage, loss or expense is caused in part by a party indemnified hereunder (except to the extent otherwise void under ORS 30.140), and

(5) any lien filed upon the project or bond claim in connection with the Work. Such obligation shall not be construed to negate, abridge, or reduce other rights or obligations of indemnity which would otherwise exist as to a party or person described in this Section G.1.2.

G.1.3 In claims against any person or entity indemnified under this Section G.1.2 by an employee of the CM/GC, a Subcontractor, anyone directly or indirectly employed by them or anyone for whose acts they may be liable, the indemnification obligation under Section G.1.2 shall not be limited by a limitation on amount or type of damages, compensation or benefits payable by or for the CM/GC or a Subcontractor under workers' compensation acts, disability benefit acts or other employee benefit acts.

G.1.4 The obligations of the CM/GC under this section G.1 shall not extend to the liability of the Architect or the Architect's consultants, agents, and any employees arising out of the preparation or approval of maps, drawings, recommendations, reports, surveys, Change Orders, designs or specifications. CM/GC will not take direction or instructions directly from the Architect.

G.2 PERFORMANCE AND PAYMENT SECURITY; PUBLIC WORKS BOND

G.2.1 The CM/GC will provide performance and payment bonds as required by the CM/GC Contract.

G.2.2 Bond forms furnished by the District and notarized by awarded CM/GC's surety company authorized to do business in Oregon are the only acceptable forms of performance and payment security, unless otherwise specified in the Contract Documents.

G.2.3 Pursuant to ORS 279C.605. any person claiming a right of action under ORS 279C.600 must file a notice of claim as provided in ORS 279C.605.

G.2.4 The CM/GC will:

(1) File a public works bond with the Construction Contractors Board pursuant to ORS 279C.836 before starting work on the Project, unless exempt under ORS 279C.836(2) (7) or (8).

(2) Include in every subcontract a provision requiring the Subcontractor to file a public works bond with the Construction Contractors Board pursuant to ORS 279C.836 before starting work on the Project, unless exempt under ORS 279C.836(2), (7) or (8). The CM/GC may require one or more Subcontractor(s) to furnish payment and performance bonds covering the faithful performance of the particular subcontract, purchase order or similar agreement and the payment of obligations arising there under. In the event such bonds are furnished pursuant to this Subparagraph, the District shall pay the CM/GC the cost of such bonds as part of the cost of work, subject to the Guaranteed Maximum Price. If mutually agreed in writing, CM/GC may elect to provide Subcontractor Default Insurance ("SDI") in lieu of performance and payment bonds for Subcontractors it may employ. Such SDI shall provide coverage against losses directly caused by the default of performance and/or payment of a subcontractor under the terms and conditions of its subcontract. SDI shall be considered as part of the Cost of the Work, subject to the Guaranteed Maximum Price.

(3) In the event that District directs the CM/GC to not procure SDI or bonds for subcontractors for the Project and in the event a subcontractor or supplier of CM/GC affected by that direction fails to perform or defaults in accordance with its subcontract, purchase agreement, or purchase order for the Project, all costs arising out of the failure or default of any subcontractor or supplier shall be a reimbursable Cost of the Work. CM/GC shall be entitled to, and within 30 days of CM/GC's tender of such costs to District, be granted a Change Order by the District in the amount of such costs arising out of the failure of performance or default of such subcontractor or supplier and granted a reasonable Increase in the Contract time to account for any schedule impacts arising out of the default. If the Work is performed on a GMP basis, the District will also increase the GMP by the amount of such costs in the Change Order.

G.3 INSURANCE

G.3.1 OCIP Insurance and Indemnity Provision

(1) The Owner of this project has elected to purchase an Owner Controlled Insurance policy (OCIP) naming it, as well as other designated Contractors, and subcontractors as named insureds and for certain risks associated with the project as set forth by the Owner. The OCIP policy is currently under development and the Owner will engage CM/GC in discussions regarding the policy and coverages prior to finalization. The Enrollment process will be defined by the policy and detailed through documents which will be made available by the OCIP Administrator. Contractors and subcontractors are considered to be enrolled in the OCIP upon the issuance of a Certificate of Enrollment. OCIP enrollment must take place prior to commencement of work performed on the project. All Contractors and Subcontractors shall be enrolled in the OCIP through the OCIP Administrator.

(2) Risks covered and not covered by the OCIP will be listed in the Program insurance policy. District shall file a copy of each completed policy with the CM/GC prior to execution of the GMP Amendment or before any on-site work begins, whichever occurs first, to allow CM/GC to review the content of the policy. Each policy shall contain a provision that the policy will not be cancelled or allowed to expire, and that its limits will not be reduced, until at least 30 days' prior written notice has been given to CM/GC. The District shall provide CM/GC with evidence of coverage and a policy endorsement identifying CM/GC, its subsidiaries, and its subcontractors/vendors as additional insureds as their interest may appear regarding work performed on the Project. It is the CM/GC's responsibility to review the policy and obtain any desired legal review and analysis it deems appropriate and in its judgment necessary regarding the Program.

(3) CM/GC agrees to furnish appropriate information, as detailed by the OCIP Administrator, about all subcontractors that will perform work on the project on behalf of the CM/GC. CM/GC shall incorporate these terms into all construction subcontracts and assure each Subcontractor's compliance with the requirements of the OCIP, and/or in the Contract Documents for the term of each subcontract. All eligible Subcontractors shall be enrolled in the OCIP Wrap Program.

(4) CM/GC agrees to follow and complete all enrollment procedures and Insurance cost reporting procedures. CM/GC shall exclude from bids the full cost of CM/GC's own CGL insurance. The OCIP Administrator shall review all insurance bid deduct information, and identify CM/GC's minimum reduction in insurance costs ("Insurance Credit") due to eligibility for the OCIP Coverages. Subsequent change order proposals shall be submitted exclusive of all CGL insurance costs, and CM/GC shall identify an additional Insurance Credit following the same procedure identified above. At the end of the work and if CM/GC's Insurance Credit was calculated based on CM/GC's initially reported payroll, Owner reserves the right to audit CM/GC's actual payroll and a final adjusted Insurance Credit may be calculated by the OCIP Administrator.

(5) CM/GC acknowledges receipt of OCIP Contractor Guidebook/Manual, included as an attachment to the Contract, and agrees to perform provisions set forth.

(6) CM/GC and District agree to waive their rights to subrogation on behalf of their insurers against each other. This includes, but is not limited to builders' risk and workers' compensation insurance. CM/GC and District shall waive all rights against each other for damages that are otherwise covered under the applicable insurance.

(7) CM/GC's indemnity obligations shall apply in the event that the OCIP does not in fact fully protect, defend and indemnify Owner, CM/GC and other indemnified parties. CM/GC's indemnity obligations are excess to the OCIP coverage and shall not take effect until and unless the insurance provided under the OCIP is exhausted, inapplicable to the particular claims or otherwise unavailable. In the event that the OCIP is exhausted, inapplicable or unavailable, CM/GC's indemnity obligations shall immediately be triggered. CM/GC's obligations to defend and indemnify Owner, and other indemnified parties shall exist whether or not there is available insurance coverage.

G.3.2. **CM/GC's Insurance Requirements Outside of the OCIP Program.** CM/GC agrees to have all required coverage that CM/GC must have by law. In addition, the following coverages will be in place for protection if CM/GC is not enrolled in the OCIP program or whenever working off the project site.

(1) **Required Coverage.** Without waiver of any other requirement of the Contract Documents, the CM/GC will provide, pay for, and maintain in full force and effect at all times during the performance of the Work until final acceptance of the Work or for such further duration as required, the following policies of insurance issued by a responsible carrier. All of the CM/GC's insurance carriers shall be rated A VII or better by A.M. Best's rating service, unless otherwise approved by the Owner.

(A) Workers' Compensation. Workers' compensation coverage sufficient to meet statutory liability limits.

(B) Employer's Liability. The CM/GC shall purchase and maintain employer's liability insurance in addition to its workers' compensation coverage with at least the minimum limits in section G.3.4 below.

(C) Commercial General Liability. The CM/GC shall purchase and maintain commercial general liability ("CGL") insurance for off-site exposures on an occurrence basis, written on ISO Form CG 00 01 (12/04 or later) or an equivalent form approved in advance by the Owner. CGL coverage shall include all major coverage categories including bodily injury, property damage and products/completed operations coverage. The CGL insurance will also include the following: (1) separation of insureds; (2) incidental medical malpractice; and (3) per-project aggregate for premises operations.

(D) Professional Liability/Errors and Omissions. To the extent that the CM/GC accepts design or design/build responsibilities, the CM/GC shall purchase and maintain professional liability/errors and omissions insurance or cause those Subcontractors providing design services do so.

(E) Automobile Liability. The CM/GC shall purchase and maintain automobile liability insurance with coverage for owned, hired, and non-owned vehicles on ISO form CA 00 01 or an equivalent form approved in advance by the Owner. The automobile liability insurance shall include pollution liability coverage resulting from vehicle overturn and collision.

G.3.3 **Limits.** The insurance required by this exhibit shall be written for at least the limits of liability specified in this Section or required by law, whichever is greatest.

Workers' Compensation.	Statutory Limits
Employer's Liability.	
Each Accident:	$1,000,000
Each Bodily Injury Disease:	$1,000,000
Aggregate Bodily Injury Disease:	$1,000,000
Commercial General Liability.	
Each Occurrence:	$1,000,000
General Aggregate:	$2,000,000
Product/Completed Operations:	$2,000,000
Personal & Advertising Injury:	$1,000,000
Fire Damage Limit:	$ 100,000
Medical Expense Limit:	$ 5,000
Automobile Liability.	
Combined Single Limit:	$ 1,000,000
Professional Liability/Errors & Omissions.	
Single Limit:	$1,000,000
Aggregate:	$1,000,000

G.3.4 **Additional Insureds.** The CM/GC's third-party liability insurance policies shall include the Owner and its officers, employees, agents, volunteers, partners, successors, and assigns as additional insureds. The policy endorsement must extend premise operations to the additional insureds. The additional insured endorsement for the CGL insurance must be written on ISO Form CG 2010 (11/85), a CG 2037 (07/04) together with CG 2033 (07/04), or the equivalent; but shall not use the following forms: CG 20 10 (10 93) or CG 20 10 (03 94).

G.3.5 **Joint Venture.** If the CM/GC is a joint venture, the joint venture shall be a named insured for the liability insurance policies.

G.3.6 **Primary Coverage.** For off-site coverage, and activities not covered by the OCIP, the CM/GC's insurance shall be primary insurance coverage and may not seek contribution from any insurance or self-insurance carried by the Owner or the Architect including any property damage coverage carried by the Owner. CM/GC's insurance shall apply separately to each insured against whom a claim is made or suit is brought. The CM/GC's insurance shall not include any cross-suit exclusion or preclude an additional insured party from asserting a claim as a third party.

G.3.7 **CM/GC's Failure to Maintain Insurance.** If the CM/GC for any reason fails to maintain required insurance coverage, such failure shall be deemed a material breach of the Contract and the Owner, at its sole discretion, may suspend or terminate the Contract pursuant to Section J of the General Conditions. The Owner may, but has no obligation to, purchase such required insurance, and without further notice to the CM/GC, the Owner may deduct from the Contract Sum any premium costs advanced by the Owner for such insurance. Failure to maintain the insurance coverage required by this exhibit shall not waive the CM/GC's obligations to the Owner

G.3.8 **Certificates of Insurance.** The CM/GC shall supply to the OCIP Administrator and/or Owner Certificates of Insurance (COI) for the insurance policies described in this exhibit prior to the commencement of the Work and before bringing any equipment or construction personnel onto the Project site.

(1) Additional Certificates. To the extent that the CM/GC's insurance coverages are required to remain in force after final payment and are reasonably available, an additional certificate evidencing continuation of such coverage shall be submitted with the final Application for Payment. Information concerning reduction of coverage on account of revised limits or claims paid under the general aggregate, or both, shall be furnished by the CM/GC with reasonable promptness in accordance with the CM/GC's information and belief.

(2) Prohibition Until Certificates Received. The Owner shall have the right, but not the obligation, to prohibit the CM/GC and its Subcontractors from entering the Project site until the required certificates (or other competent evidence that insurance has been obtained in complete compliance with this exhibit) are received and approved by the OCIP Administrator or Owner.

(3) Deductibles/Self-Insured Retentions. Payment of deductibles or self-insured retention is a Cost of the Work within the Guaranteed Maximum Price and does not justify a Change Order. Satisfaction of all self-insured retentions or deductibles applicable to policies obtained by the CM/GC or its subcontractors under this Contract will be the sole responsibility of the CM/GC.

G.3.9 **Subcontractor Insurance.** If the CM/GC and subcontractors are not enrolled in an OCIP program, the CM/GC shall cause each Subcontractor to purchase and maintain in full force and effect policies of insurance as specified in this exhibit, except for coverage limits, which will be agreed upon between the Owner and the CM/GC. The CM/GC will be responsible for the Subcontractors' coverage if the Subcontractors fail to purchase and maintain the required insurance. The CM/GC will furnish copies of certificates of insurance establishing coverage for each Subcontractor.

G.3.10 **Limitations on Coverage.**

(1) No insurance provided by the CM/GC under this exhibit will be required to indemnify the Owner, the Architect, or their employees or agents to the extent of liability for death or bodily injury to persons or damage to property caused in whole or in part by their own negligence, but will require indemnity to the extent of the fault of the CM/GC or its agents, representatives, or Subcontractors.

(2) The obligations of the CM/GC under this exhibit shall not extend to the liability of the Architect or its consultants for (1) the preparation or approval of maps, Drawings, opinions, reports, surveys, Change Orders, designs, or specifications, or (2) the giving or failure to give directions or instructions, to the extent that the directions, or failure to provide directions, are the cause of the injury or damage.

(3) By requiring insurance, the Owner does not represent that coverage and limits will necessarily be adequate to protect the CM/GC. Insurance in effect or procured by the CM/GC will not reduce or limit the CM/GC's contractual obligations to indemnify and defend the Owner for claims or suits that result from or are connected with the performance of the Contract.

G.3.11. **Property Insurance**

(1) **Builder's Risk.**

As applicable to the project, Owner shall provide builder's risk insurance for the Project covering physical loss or damage to the Work in the amount of the total Project sum. Such insurance shall cover the work, false work, temporary structures, all supplies and materials furnished in connection therewith and destined to become a part of the Work, and shall include some limited amount of off-site storage and transit coverage.

If such builder's risk insurance has a deductible, the CM/GC shall be responsible for the first $10,000 under the deductible. The remainder of such deductible, if any, shall be the responsibility of the first named insured on the policy.

Should Owner decide not to provide builder's risk insurance, Owner shall immediately notify CM/GC of such decision and allow CM/GC to procure builder's risk insurance. The Owner shall also allow CM/GC to submit a Change Order to Owner for the reimbursement of the cost of builder's risk insurance as procured by the CM/GC.

Any claim against the builders risk insurance policy must be made in accordance with, and is subject to, Section D.3 of these General Conditions ("Claims Review Process")

(2) **CM/GC's Responsibility.** CM/GC must provide insurance for its own machinery, tools, equipment, or supplies that are not to become a part of the Project.

SECTION H
SCHEDULE OF WORK

H.1 CONTRACT PERIOD

H.1.1 Time is of the essence on this Contract. The CM/GC shall at all times carry on the Work diligently with required crew sizes, without delay and punctually fulfill all requirements herein. CM/GC shall commence Work on the site within ten (10) business days of Notice to Proceed, unless directed otherwise.

H.1.2 Unless specifically extended by Change Order, all Work shall be complete by the date contained in the Contract Documents. The District shall have the right to accelerate the completion date of the Work, which may require the use of overtime to the extent such overtime is not required to achieve Substantial Completion. Such accelerated Work shall be subject to the Change Order process of Section D.1. In the event that overtime or other acceleration is required to achieve the Substantial Completion Date in the Contract Documents, the CM/GC shall be responsible for the additional cost.

H.1.3 The District shall not waive any rights under the Contract by permitting the CM/GC to continue or complete the Work or any part of it after the date described in Section H.1.2 above.

H.2 SCHEDULE

CM/GC shall provide by ten (10) business days before the pre-construction conference, a detailed master construction schedule for review and acceptance by the District. The submitted schedule must illustrate Work by significant project components, significant labor trades, long lead items, broken down by building and/or floor where applicable. Schedules lacking adequate detail, or unreasonably detailed, will be rejected. Included within the schedule are the following: Notice to Proceed, submittal preparation and review, project critical path, weather delays, any interim or phased work completions, Substantial Completion, and Final Completion. Schedules will be updated monthly and submitted with the monthly payment application. Acceptance of the Schedule by the District does not constitute agreement by the District, as to the CM/GC's sequencing, means, methods, or allocated Contract Time. Any positive difference between the CM/GC's scheduled completion and the Contract completion date is float owned by the CM/GC, with the exception of float included for Weather Delays. In no case shall the CM/GC make a request for additional compensation for delays if the Work is completed within the Contract Time but after CM/GC's scheduled completion. The CM/GC must notify the District if float is going to be used in any adjustment to the Master Schedule.

H.3 PARTIAL OCCUPANCY OR USE

The District may occupy or use any completed or partially completed portion of the Work at any stage, provided such occupancy or use is consented to by public authorities having jurisdiction over the Work. Such partial occupancy or use may commence whether or not the portion is substantially complete, provided the District and CM/GC have reasonably accepted in writing the responsibilities assigned to each of them for payments, retainage, if any, security, insurance or self-insurance, maintenance, heat, utilities, and damage to the Work, and have agreed in writing concerning the period for correction of the Work and commencement of warranties required by the Contract Documents with respect to such portion of the Work. Approval by the CM/GC to partial occupancy or use shall not be unreasonably withheld; however, CM/GC shall not be required to allow unguided access to non-construction personnel to the Project or Project site. Immediately prior to such partial occupancy or use, the District and CM/GC shall jointly inspect the area to be occupied or portion of the Work to be used in order to determine and record the condition of the Work. Partial occupancy or use of a portion or portions of the Work shall not constitute acceptance of Work not complying with the requirements of the Contract Documents.

H.4 BENEFICIAL OCCUPANCY OR USE

The District may take possession of areas of the Project as a part of a scheduled, phased occupancy. Where such phased Beneficial Occupancy occurs, the CM/GC shall facilitate such occupancy, shall agree to reasonably work around occupied areas and shall conduct the balance of the construction of the Work in such a fashion to avoid impeding or otherwise obstructing the access to or activities conducted within the occupied space. Any additional costs to CM/GC in accommodating a phased occupancy by the District that is not included in the schedule in the GMP Amendment or subsequent Change Order shall be paid for by the District via Change Order, unless the need for a phased occupancy is due to CM/GC caused delay.

SECTION I
CORRECTION OF WORK

I.1 CORRECTION OF WORK BEFORE FINAL PAYMENT

The CM/GC warrants to the District that materials and equipment furnished under the Contract will be of good quality and new unless otherwise required or permitted by the Contract Documents, that the Work will be free from defects, and that the Work will conform to the requirements of the Contract Documents. Work failing to conform to these requirements shall be deemed defective. CM/GC shall promptly remove from the premises and replace all defective materials and equipment as determined by the District's Authorized Representative, whether incorporated in the Work or not. Removal and replacement shall be without loss or expense to the District, and CM/GC shall bear the cost of repairing all Work destroyed or damaged by such removal or replacement. CM/GC shall be allowed a period of no longer than sixty (60) Calendar Days for completion of defective (punch list) work, unless otherwise agreed. At the end of that period, or earlier if requested by the CM/GC, District shall arrange for inspection of the Work by the Architect/Engineer. Should the Work not be complete, and all corrections made, the costs for all subsequent re-inspections shall be borne by the CM/GC. If CM/GC fails to complete the punch list work within the above time period, without affecting CM/GC's obligations District may perform such work and CM/GC shall reimburse District all costs of the same within twenty five (25) days after demand through the implementation of a deductive Change Order

I.2 WARRANTY WORK

I.2.1 Neither the final certificate of payment nor any provision of the Contract Documents shall relieve the CM/GC from responsibility for defective Work and, unless a longer period is specified, CM/GC shall correct all defects that appear in the Work within a period of one year from the date of issuance of the written notice of Substantial Completion by the District except for latent defects which will be remedied by the CM/GC at any time they become apparent. When Beneficial Occupancy is established for any portion of the work, the warranty period for that portion of work and the systems that support that portion of work begins at the time of notice of Beneficial Occupancy.

I.2.2 The District shall give CM/GC notice of defects with reasonable promptness. CM/GC shall perform such warranty work within a reasonable time after District's demand. If CM/GC fails to complete the warranty work within such period as District determines reasonable, or at any time in the event of warranty work consisting of emergency repairs, without affecting CM/GC's obligations, District may perform such work and CM/GC shall reimburse District all costs of the same within thirty (30) Days after demand.

I.2.3 This provision does not negate guarantees or warranties for periods longer than one year including without limitation such guarantees or warranties required by other sections of the Contract Documents for specific installations, materials, processes, equipment or fixtures.

I.2.4 In addition to CM/GC's warranty, manufacturer's warranties shall pass to the District and shall not take effect until affected Work has been accepted in writing by the District's Authorized Representative.

I.2.5 The one-year period for correction of Work shall be extended with respect to portions of Work performed after Substantial Completion or Beneficial Occupancy by the period of time between Substantial Completion or Beneficial Occupancy and the actual performance of the Work, and shall be extended by corrective Work performed by the CM/GC pursuant to this Section, as to the Work corrected. The CM/GC shall remove from the site portions of the Work which are not in accordance with the requirements of the Contract Documents and are neither corrected by the CM/GC nor accepted by the District.

I.2.6 Nothing contained in this Section I.2 shall be construed to establish a period of limitation with respect to other obligations which the CM/GC might have under the Contract Documents. Establishment of the period for correction of Work as described in this Section I.2 relates only to the specific obligation of the CM/GC to correct the Work, and has no relationship to the time within which the obligation to comply with the Contract Documents may be sought to be enforced, nor to the time within which proceedings may be commenced to establish the CM/GC's liability with respect to the CM/GC's obligations other than specifically to correct the Work.

I.2.7 If the District prefers to accept Work which is not in accordance with the requirements of the Contract Documents, the District may do so instead of requiring its removal and correction, in which case the Contract Price will be reduced as appropriate and equitable. Such adjustment shall be effected whether or not final payment has been made.

SECTION J
SUSPENSION AND/OR TERMINATION OF THE WORK

J.1 DISTRICT'S RIGHT TO SUSPEND THE WORK

J.1.1 The District and/or the District's Authorized Representative has the authority to suspend portions or all of the Work

J.1.2 The District shall notify CM/GC and the CM/GC's Surety in writing of the effective date and time of the suspension and shall notify CM/GC and its surety in writing to resume Work.

J.2 CM/GC'S RESPONSIBILITIES

J.2.1 During the period of the suspension, CM/GC is responsible to continue maintenance at the project just as if the Work were in progress. This includes, but is not limited to, protection of completed Work, maintenance of access, protection of stored materials, temporary facilities, and clean-up.

J.2.2 When the Work is recommenced after the suspension, the CM/GC shall replace or renew any Work damaged during the suspension, remove any materials or facilities used as part of temporary maintenance, and complete the project in every respect as though its prosecution had been continuous and without suspension.

J.3 COMPENSATION FOR SUSPENSION

J.3.1 Depending on the reason for suspension of the Work, the CM/GC or the District may be due compensation by the other party. If the suspension was required due to acts or omissions of CM/GC, the District may assess the CM/GC actual costs of the suspension in terms of administration, remedial work by the District's forces or another CM/GC to correct the problem associated with the suspension, rent of temporary facilities, and other actual costs related to the suspension. If the suspension was caused by acts or omissions of the District, the CM/GC shall be due compensation which shall be defined using Section D, Changes in Work. If the suspension was required through no fault of the CM/GC or the District, neither party owes the other for the impact.

J.4 DISTRICT'S RIGHT TO TERMINATE CONTRACT

J.4.1 The District may, without prejudice to any other right or remedy, and after giving CM/GC five business days' written notice and an opportunity to cure, terminate the Contract in whole or in part under the following conditions:

(1) If CM/GC should voluntarily or involuntarily, seek protection under the United States Bankruptcy Code and CM/GC as debtor in-possession or the Trustee for the estate fails to assume the Contract within a reasonable time;

(2) If CM/GC should make a general assignment for the benefit of CM/GC's creditors;

(3) If a receiver should be appointed on account of CM/GC's insolvency;

(4) If CM/GC should repeatedly refuse or fail to supply an adequate number of skilled workers or proper materials to carry on the Work as required by the Contract Documents, or otherwise fail to perform the Work in a timely manner;

(5) If CM/GC should repeatedly fail to make prompt payment to Subcontractors or for material or labor, or should disregard laws, ordinances or the instructions of the District or its Authorized Representative; or

(6) If CM/GC is otherwise in material breach of any part of the Contract.

J.4.2 At any time that any of the above occurs, District may exercise all rights and remedies available to District at law or in equity, and in addition, District may take possession of the premises and of all materials and appliances and finish the Work by whatever method it may deem expedient. In such case, the CM/GC shall not be entitled to receive further payment until the Work is completed. If the District's cost of finishing the Work exceeds the unpaid balance of the Contract Price, CM/GC shall pay the difference to the District.

J.5 TERMINATION FOR CONVENIENCE

J.5.1 District may terminate the Contract in whole or in part whenever District determines that termination of the Contract is In the best interest of the public.

J.5.2 The District will provide the CM/GC with five (5) business days' prior written notice of a termination for public convenience. After such notice, the CM/GC shall provide the District with immediate and peaceful possession of the premises and materials located on and off the premises for which the CM/GC received progress payment under Section E. Compensation for Work terminated by the District under this provision will be according to Section E. In no circumstance shall CM/GC be entitled to lost profits for Work not performed due to termination.

J.6 ACTION UPON TERMINATION

J.6.1 Upon receiving a notice of termination, and except as directed otherwise by the District, CM/GC shall immediately cease placing further subcontracts or orders for materials, services, or facilities. In addition, unless assigned as provided in Section J.6.4, below, CM/GC shall terminate all subcontracts or orders to the extent they relate to the Work terminated and, with the prior written approval of the District, settle all outstanding liabilities and termination settlement proposals arising from the termination of subcontracts and orders.

J.6.2 As directed by the District, CM/GC shall upon termination transfer title and deliver to the District all Record Documents, information, and other property that, if the Contract had been completed, would have been required to be furnished to the District.

J.6.3. Upon receiving a notice of termination CM/GC shall, prior to vacating the site, provide to District a detailed written assessment of any potentially unsafe conditions on site that may be a threat to health or human safety.

J.6.4 CM/GC shall assign to District each subcontract agreement for a portion of the Work provided that: (i.) Assignment is effective only after termination of this Contract by District for cause or stoppage of the Work by District, and only for those subcontract agreements which District accepts by notifying the subcontractor and CM/GC in writing; and (ii). Assignment is subject to the prior rights of the surety, if any, obligated under bond relating to this Contract. Upon such assignment, if the Work has been suspended for more than thirty (30) days, District shall equitably adjust subcontractor's compensation for increases in cost resulting from the suspension.

SECTION K
CONTRACT CLOSE OUT

K.1 SUBSTANTIAL COMPLETION DOCUMENTATION

In addition to other requirements specified in the contract, the following deliverables are required in order for Substantial Completion to be achieved:

1. A written punch list of known outstanding or corrective work has been prepared by the CM/GC and submitted at least a week prior to Substantial Completion so that the Owner can prepare a supplemental punch list;
2. Both O&M Manuals and Record Documents have been submitted to the District for review;
3. The Authority Having Jurisdiction has granted a certificate of occupancy;
4. Have all training sessions scheduled with District staff;
5. Final clean has been completed;

K.2 RECORD DOCUMENTS

As a condition of final payment (refer also to section E.6), CM/GC shall comply with the following: CM/GC shall provide to District's Authorized Representative, final Record Documents of the entire project. Record Documents shall depict the project as constructed and shall reflect each and every change, modification, and deletion made during the construction. Record Documents are part of the Work and shall be provided prior to the District's issuance of final payment. Record Documents include all modifications to the Contract Documents unless otherwise directed.

K.3 OPERATION AND MAINTENANCE MANUALS

As part of the Work, CM/GC shall submit completed operation and maintenance manuals ("O & M Manuals") in electronic format (.PDF) and in conformance with the final BIM Execution Plan for review by the District's Authorized Representative. The O & M Manual shall contain a complete set of product data as required by the specifications, color/finish selections, training information, phone list of consultants, manufacturers, installer and suppliers, manufacturer's printed data, schematic diagrams of systems, appropriate equipment indices, warranties and bonds. The proposed content of the O&M Manual will be reviewed and approved by the District prior to assembly of the manual. The District's Authorized Representative shall review and return an electronic copy of the O & M Manual for any modifications or additions required. Prior to submission of its final pay request, CM/GC shall deliver **electronic copies** of O & M Manuals and one electronic copy delivered either in CD or Flash Drive format to the District's Authorized Representative.

K.4 AFFIDAVIT/RELEASE OF LIENS AND CLAIMS

As a condition of final payment, the CM/GC shall submit to the District's Authorized Representative a notarized affidavit/release of liens and claims form, in a form satisfactory to District, which states that all Subcontractors and suppliers have been paid in full, all disputes with property Districts have been resolved, all obligations on the project have been satisfied, all monetary claims and indebtedness have been paid, and that, to the best of the CM/GC's knowledge,

there are no claims of any kind outstanding against the project. The CM/GC shall indemnify, defend (with counsel of District's choice) and hold harmless the District from all claims for labor and materials finished under this Contract. The CM/GC shall furnish complete and valid releases or waivers, satisfactory to the District, of all liens arising out of or filed in connection with the Work. CM/GC shall collect all affidavit and lien release documents to deliver to the District in a single consolidated package.

K.5 COMPLETION NOTICES

K.5.1 CM/GC shall provide District notice of both Beneficial Occupancy, Substantial Completion, and Final Completion. The certificate of Substantial Completion shall state the date of Substantial Completion, the responsibilities of the District and CM/GC for security, maintenance, heat, utilities, damage to the Work and insurance, and the time within which the CM/GC shall finish all items on the punch list accompanying the Certificate. Beneficial Occupancy and both completion notices must be signed by the CM/GC and the District to be valid. The District shall provide the final signature on the notices. The notices shall take effect on the date they are signed by the District.

K.5.2 Substantial Completion of a facility with operating systems (e.g., mechanical, electrical, HVAC) shall be that degree of completion that has provided a minimum of thirty (30) continuous Days of successful, trouble-free operation with normal operational staffing experience and levels, which period shall begin after all performance and acceptance testing has been successfully demonstrated to the District's Authorized Representative. All equipment contained in the Work, plus all other components necessary to enable the District to operate the facility in the manner that was intended, shall be complete on the Substantial Completion date. The CM/GC may request that a punch list be prepared by the District's Authorized Representative with submission of the request for the Substantial Completion notice. In cases of Beneficial Occupancy, the 30 day operating prior to the issuance of the notice may be waived by the Project Manager or Project Director at the District's sole discretion.

K.6 TRAINING

As part of the Work, and prior to submission of the request for final payment, the CM/GC shall schedule with the District's Authorized Representative, training sessions for all equipment and systems, as required in the individual specifications sections. CM/GC shall schedule training sessions at least ten (10) business days in advance of the date of training to allow District personnel adequate notice. The O & M Manual shall be used as a basis for training. Training shall be a formal session, held after the equipment and/or system is completely installed and operational in its normal operating environment.

K.7 EXTRA MATERIALS

As part of the Work, CM/GC shall provide spare parts, extra maintenance materials, and other materials or products in the quantities specified in the specifications, prior to final payment. Delivery point for extra materials shall be designated by the District's Authorized Representative.

K.8 ENVIRONMENTAL CLEAN-UP

As part of the Final Completion notice, or as a separate written notice submitted with or before the notice of Final Completion, the CM/GC shall notify the District that all environmental pollution clean-up which was performed as a part of this Contract has been disposed of in accordance with all applicable rules, regulations, laws, and statutes of all agencies having jurisdiction over such environmental pollution. The notice shall reaffirm the indemnification given under Section F.5.1 above.

K.9 CERTIFICATE OF OCCUPANCY

The CM/GC shall not be granted Final Completion or receive final payment if the District has not received an unconditioned certificate of occupancy from the appropriate state and/or local building officials, unless failure to obtain an unconditional certificate of occupancy is due to the fault or neglect of District.

K.10 OTHER CM/GC RESPONSIBILITIES

The CM/GC shall be responsible for returning to the District all items issued during construction such as keys, security passes, site admittance badges, and all other pertinent items. The CM/GC shall be responsible for notifying the appropriate utility companies to transfer utility charges from the CM/GC to the District. The utility transfer date shall not be before Substantial Completion and may not be until Final Completion, if the District does not take beneficial use of the facility and the CM/GC's forces continue with the Work.

K.11 SURVIVAL

All warranty and indemnification provisions of this Contract, and all of CM/GC's other obligations under this Contract that are not fully performed by the time of Final Completion or termination, shall survive Final Completion or any termination of the Contract .

SECTION L
LEGAL RELATIONS & RESPONSIBILITIES

L.1 LAWS TO BE OBSERVED

In compliance with PPS-49-0200(1)(c)(I) (reference ORS 279C.525), CM/GC shall comply with any and all enacted ordinances or regulations relating to environmental pollution and the preservation of natural resources that may affect the performance of the Contract. State law requires that solicitation documents for a public improvement contract make specific reference to federal, state, and local agencies that have enacted ordinances, rules, or regulations dealing with the prevention of environmental pollution or the preservation of natural resources that may affect the performance of this Contract. These agencies include, but are not limited to:

L.1.1 Federal Agencies: Department of Agriculture, Forest Service, Soil and Water Conservation Service, Coast Guard, Department of Defense, Army Corps of Engineers, Department of Emergency, Federal Energy Regulatory Commission, Environmental Protection Agency, Department of Health and Human Services, Department of Housing and Urban Development, Solar Energy and Energy Conservation Bank, Department of Interior, Bureau of Land Management, Bureau of Indian Affairs, Bureau of Mines, Bureau of Reclamation, Geological Survey, Minerals Management Service, U.S. Fish and Wildlife Service, Department of Labor, Mine Safety and Health Administration, Occupation Safety and Health Administration, Department of Transportation, Federal Highway Administration, Water Resources Council.

L.1.2 State Agencies: Department of Administrative Services, Department of Agriculture, Soil and Water Conservation Commission, Columbia River Gorge Commission, Department of Energy, Department of Environmental Quality, Department of Fish and Wildlife, Department of Forestry, Department of Geology and Mineral Industries, Department of Human Resources, Department of Consumer and Business Services, Land Conservation and Development Commission, Department of Parks and Recreation, Division of State Lands, Department of Water Resources.

L.1.3 Local Agencies: City councils, county courts, county boards of commissioners, metropolitan service district councils, design commissions, historic preservation commissions, planning commissions, development review commissions, special district boards of directors, and other special districts and special governmental agencies such as Tri-Met, urban renewal agencies, and Port Districts.

L.1.4 Tribal Governments.

PRECONSTRUCTION SCOPE OF WORK

During preconstruction, the CM/GC shall actively participate as a member of the Project team with the Owner and the Architect during the Schematic Design, Design Development and Construction Documents Phases prior to construction.

The CM/GC will work collaboratively and proactively with the Owner and Architect to proceed with planning, design and development of the work in a manner which supports the Owner's efforts to keep costs within the Owner's budget. The CM/GC shall provide Construction Management (CM) services throughout the Project, from the preconstruction period through construction and shall closely coordinate such work with the Ownership team, Architect and sub-consultants.

1) The CM/GC's CM services shall include but not be limited to:
   a) Participate in Owner's meetings weekly during Schematic Design, Design Development and Construction Documents.
   b) Consult with the District in refining the project construction budget, and establishing and maintaining a detailed cost model for the work as the design evolves.
   c) Field and Existing Conditions Investigation. Document findings using diagrams, logs, photos, and destructive testing.
   d) Design Document Reviews, Assessments, and Constructability Analysis: the CM/GC shall be responsible for providing necessary consulting expertise to the Owner to ensure that the program scope is maximized and the construction budget and the Project schedule are met.
   e) Assistance reviewing systems and products to facilitate LEED Certifications.
   f) Assess, develop and recommend site logistics requirements to encompass all proposed activities and impacts to the site, adjacent properties, and neighboring streets.
   g) Assist in identifying safe work practices and requirements for construction and future maintenance work with PPS fall protection plan.
   h) Recommend phasing or sequencing of work and construction scheduling.
   i) Provide a Critical Path schedule and site logistics plan; prepare a detailed milestone schedule identifying the work to be performed by the Design Team, the District, and the CM/GC during this phase. The CM/GC shall report progress bi -weekly against the District's overall Project schedule.
   j) Providing cost-estimating, including GMP development and subcontractor procurement.
   k) Determine and reconcile constructability issues and perform formal constructability reviews of the design documents prior to subcontract bidding.
   l) Assess alternative construction options for cost savings; Process, Systems, and Products Value Assessments and Recommendations.
   m) Identify concepts for Value Engineering. This will include a facilitated 5 day workshop inclusive of project stakeholders.
   n) Permit procurement assistance and agency coordination with the Design Team and develop a strategy for obtaining building permits in a timely fashion. Meet with building and other regulatory officials as appropriate. Attend all meetings pertaining to permitting, as required. It is anticipated that these functions will continue throughout all phases of the project.
   o) Preparation for Subcontractor Selection and Bidding for the final establishment of a GMP for the Work.
   p) Coordination with the Design Team to assist in their preparation of initial BIM modeling.
   q) Update BIM model as necessary.
   r) Maintain a current design documents in Bluebeam, or similar program, through construction. Bluebeam, or similar program to be used for collaborative work sessions and documents reviews.
   s) Overall coordination as a member of the Project Team to ensure that the project meets quality, scope, schedule, and budget objectives.
   t) In coordination with the Project Team, develop and implement a business equity plan tailored to the project and design to help PPS meet its business equity aspirational goal of achieving 18% certified MWESB participation.

ATTACHMENT G
PRECONSTRUCTION SCOPE OF WORK

2) Upon Execution of the Contract:

   a) Review all technical reports and other relevant information pertaining to the Project and become familiar with all:

      i. Existing survey data, Arborist report, Geotechnical reports, Master Plan Report.

      ii. District Building Information Modeling Standards.

      iii. AHERA, Apex Hazmat Report, Environmental Reports Phase 1 and Phase 2.

      iv. Existing utility Information As-builts and/or other record documents available from District including BIM model of existing facility.

      v. Building commissioning plan/specifications (when available and applicable).

      vi. Portland Public School District Design Guidellnes and Standards.

   b) Review Concept Design information and become familiar with existing design efforts and progress.

   c) Attend kick-off meeting with District and A/E.

   d) Conduct site tour with District to become familiar with Project site and existing conditions.

   e) Attend training session on District's PMIS system (e-Builder Enterprise).

   f) Review District's construction budget(s) and provide commentary on adequacy /alignment with current market trends.

   g) Review and understand Owner's Program of Requirements (OPRs) for the Project.

   h) Submit a detailed Preconstruction Work Plan for the work of this section incorporating the Owner's comments from the CM/GC's proposal for these services.

3) Schematic Design (SD) Phase Services

   a) Provide estimate of SD design submittal and provide to District for review/acceptance. Reconcile estimate with District and A/E and make all necessary adjustments to align estimate with Design Intent.

   b) Provide administration coordination and field support for State of Oregon Green Energy Technology (GET) and Energy Trust of Oregon (ETO) paperwork i.e. breaking out take off items that apply to these grants and funding, estimates of work, line breakouts on the schedule of values as it applies.

   c) Provide design review and written commentary on constructability, sustainability (both total-cost-of-ownership and environmental), costing, safety and/or procurement issues identified by the CM/GC. Attend necessary meetings/discussions to answer questions or provide additional coordination with District and A/E.

   d) CM/GC to provide a list of any contractor-proposed deviations from the PPS Design Guidelines and Standards.

   e) Review Master Project Schedule and provide written commentary to District. Attend necessary meetings/discussions to answer questions or provide additional coordination with District and A/E.

   f) Develop Project phasing plan including any early or separate work packages and assist A/E to develop necessary coordination between packages including temporary construction requirements.

   g) Provide recommended sub-contractors to be solicited and procured during Design Development to assist CM/GC and District through Pre-Construction Services. Provide procurement process for District review and acceptance and facilitate process through to execution of sub-contract agreements.

   h) Conduct necessary explorations/discovery of existing systems, structures or finishes to fully understand the nature of the existing facility and its systems, and validate as-built conditions. Provide District acceptable patches/covers to areas where destructive testing was required. Areas that will not be addressed as a part of the Project but disturbed by investigation/exploration/discovery/destructive testing shall be returned to a similar or better condition.

ATTACHMENT G
PRECONSTRUCTION SCOPE OF WORK

i) Starting with the 100% SD estimate, the CMGC shall develop and maintain a budget control log that shall include all project estimate figures and notes to identify what modifications have been made to adjust costs in each category to maintain the overall project budget.

j) With District Representatives, initiate and/or support coordination/communication with Agencies Having Jurisdiction over Project. Agencies may include but are not limited to:

i. City of Portland Bureau of Environmental Services
ii. City of Portland Bureau of Transportation
iii. City of Portland Building Department
iv. State of Oregon Department of Environmental Quality
v. State Historical and Preservation Office
vi. Portland Bureau of Transportation
vii. State and Local Fire Marshal's Office
viii. Portland Parks and Recreation
ix. Multnomah County

4) Design Development (DD) Phase Services

a) Based on the approved Schematic Design, the CMGC shall prepare a site logistics plan for review and approval by the Architect and District. The CMGC shall continue through the course of the design to coordinate with the Architect to ensure that the logistics plan is updated appropriately. When updates are required, each update shall be submitted for review and approval by the Architect and District.

b) Update the construction phasing plan and advise the A/E on areas where additional design is needed to construct temporary and/or permanent facilities to facilitate phased construction. The CM/GC shall also take into consideration cost reductions, cost information, constructability, provisions for temporary facilities and procurement and construction scheduling issues.

c) Provide estimate of 50%, and 100% DD Design submittals and provide to District for review/acceptance. Reconcile estimate with District and A/E and make all necessary adjustments to align estimate with Design Intent/Design Development documents. Identify significant differences or factors affecting the estimate as compared to the SD estimate completed by the CM/GC.

d) Participate in any/all Value Engineering sessions and support Project Team's efforts to align Project scope, budget and schedule with functional requirements.

e) CM/GC to provide a list of any contractor-proposed deviations from the PPS Design Guidelines and Standards.

f) Provide administration coordination and field support State of Oregon Green Energy Technology (GET) and Energy Trust of Oregon (ETO) paperwork, i.e. breaking out take off items that apply to these grants and funding, estimates of work, line breakouts on the schedule of values as it applies.

g) Provide Design Development document review and provide written commentary on constructability, sustainability (both total-cost-of-ownership and environmental), costing, safety and/or procurement issues identified by the CM/GC. Attend necessary meetings/discussions to answer questions or provide additional coordination with District and A/E. Back-check previous commentary to ensure issues have been addressed or A/E commentary has been provided to support original design. Identify significant differences or factors affecting the design as compared to the SD design review completed by the CM/GC.

h) Lead clash detection and other virtual design and construction (VDC) related activities with assistance from District and A/E. Facilitate and lead clash detection resolution meetings and generate minutes from each session. Participate and provide input during Integrated Concurrent Engineering (ICE) sessions to align construction and design efforts.

i) Develop and facilitate sub-contractor outreach efforts, acceptable to the District, to generate local market interest. CM/GC will specifically focus on supporting District's Equity in Public Purchasing and Contracting outreach efforts to State of Oregon certified Minority, Women and Emerging Small Businesses. Efforts by the CM/GC shall include local associations and groups such as Oregon Association of Minority Entrepreneurs (OAME), Commercial Real Estate Women (CREW) or Oregon Entrepreneurs Network (OEN).

ATTACHMENT G
PRECONSTRUCTION SCOPE OF WORK

j) Participate In student outreach efforts, acceptable to the District, to generate opportunities for engaging District students, providing learning opportunities and providing mentorship opportunities. CM/GC shall develop and facilitate a program, acceptable to the District, to be implemented with the sub-contracting community to further support these efforts through the Oregon Connect system utilized by the District.

k) Assist District as required to facilitate community outreach, education and information sessions.

l) Procure key subcontractors via a qualifications-based selection process as mutually agreed upon by the District and consistent with District procurement rules under Division 49.

m) Provide necessary "on-boarding" efforts to align key sub-contractors with project team and Project. Provide all contracting, management and contract administration required. CM/GC shall be the point of contact and solely responsible for the key subcontractors.

n) Provide all necessary field investigation work required to fully understand the scope, scale or conditions of the existing conditions of the Project including but not limited to:

   i. Special inspection
   ii. Testing
   iii. Hazmat removal or containment
   iv. Intrusive investigation
   v. Selection demolition and restoration
   vi. Equipment verification

   Note: All public facing finishes shall be made fully safe and/or returned to their original condition prior to the space being returned to public use.

5) GMP Development

a) Develop GMP estimate with full documentation of costs, allowances, contingencies and other costing information as well as qualifications, assumptions, clarifications and exclusions. Coordinate review and alignment with District expectations, GMP Support Documents and other relevant documents.

b) Develop Master Construction CPM Schedule based on 100% Design Development Documents for District review and acceptance that fully describes and details the construction methodology of the Project.

c) Develop detailed phasing and sequencing plan(s) for the Project and incorporate specifics into the bid packages for the General Subcontractor Bidding phase.

d) Prepare, for the Architect's review and the Districts approval, a procurement schedule for items that must be ordered well in advance of construction.

e) Expedite and coordinate the ordering and delivery of materials that must be ordered well in advance of construction.

6) Construction Documents (CD) Phase Services

a) Continue to lead clash detection and other virtual design and construction (VDC) related activities with assistance from District and A/E. Facilitate and lead clash detection resolution meetings and generate minutes from each session. Participate and provide Input during Integrated Concurrent Engineering (ICE) sessions to align construction and design effort.

b) Facilitate a document version control process/system with assistance from District and A/E, that is acceptable to District, to streamline document/revision control during the Construction Document phase as well as General Sub Bidding and Construction phase change management control. Systems may include, but not required to specifically be, use of BlueBeam Studio (preferred), Adobe Acrobat Online Collaboration, DropBox or other similar systems. System shall be utilized by CM/GC, A/E, District and others to minimize physical paper requirements for documentation. Post design changes from RFI's, ASI's, Submittals, and field investigations daily.

c) Continue to develop and facilitate sub-contractor outreach efforts, acceptable to the District, to generate local market interest. CM/GC will specifically focus on supporting District's Equity in Public Purchasing and Contracting outreach efforts to State of Oregon certified Minority, Women and Emerging Small Businesses.

d) Continue to develop and facilitate student outreach efforts, acceptable to the District, to generate opportunities for engaging District students, providing learning opportunities and providing mentorship opportunities. CM/GC shall develop and facilitate program, acceptable to the District, to be implemented with the sub-contracting community to further support these efforts.

e) Develop and align sub-contracting bid packages with accepted Master Construction Schedule and GMP.

f) Lead and manage review of on-going design efforts and provide written commentary/guidance for aligning design progression with GMP requirements. Participate in any/all meetings required to guide design efforts in accordance with GMP parameters. CM/GC will not retain any authority in directing A/E, its' forces or those of A/E's sub- consultants.

g) Coordinate efforts of key subcontractors in support of the Project.

h) Provide estimate of 50% CD Design submittal and provide to District for review/acceptance. Reconcile estimate with District and A/E and make all necessary adjustments to align estimate with GMP documents. 90% CD estimates shall be formatted in such a way as to provide CM/GC's expected results for each bid package and a basis for comparing bids against market conditions. Identify significant differences or factors affecting the estimate as compared to the previous estimates completed by the CM/GC.

i) Lead Value Engineering sessions and support Project Team's efforts to align Project scope, budget and schedule. CM/GC's value engineering recommendations shall be consistent with the District's OPRs for the Project. CM/GC understands that substantial changes inconsistent with previous District approvals may be considered additional services by the design team and may impact the Project Schedule. The CM/GC shall endeavor to make recommendations that achieve the budget, schedule and/or quality goals while remaining consistent with the original directions provided to the Architect. Value engineering shall be undertaken as an on- going process through the design phase.

j) Provide 50% and 90% Construction Document submittal review and provide written commentary on constructability, sustainability (both total-cost-of-ownership and environmental), costing, safety and/or procurement issues identified by the CM/GC. Attend necessary meetings/discussions to answer questions or provide additional coordination with District and A/E. Back-check previous commentary to ensure issues have been addressed or A/E commentary has been provided to support original design. Identify significant differences or factors affecting the design as compared to the previous design reviews completed by the CM/GC.

k) Assist District as required to facilitate community outreach, education and Information sessions.

l) Assist with the District in identifying critical elements of the Project that may require special procurement processes, such as prequalification of bidders or alternative contracting methods.

7) Permitting & Land Use

a) Obtain trade permits as required to complete the project.

b) Assist District in obtaining land Use and building permit approvals. CM/GC shall provide necessary documents, reports or other supportive information as required.

8) General Sub-contractor Bidding

a) Manage sub-contractor bidding process in "lowest-responsible-bid" format for each bid package. Include pre-bid conference, bid day specific requirements and facilitate bid package review with District and A/E.

b) CM/GC shall procure a minimum of three bids per bid package or scope of work, including work components which the CM/GC may be interested in self-performing.

c) When there are single fabricators of materials, special packaging requirements for subcontractor work, or work performed by the CM/GC, advance approval by the District's representative is required.

ATTACHMENT G
PRECONSTRUCTION SCOPE OF WORK

d) CM/GC will contact a minimum of three (3) certified MWESB subcontractors. The District has a goal of achieving 18% participation.

- CM/GC will make the first contact with each MWESB subcontractor no less than twenty one (21) calendar days before Bid Opening.
- CM/GC will contact MWESB subcontractors by email, fax, or telephone to advise them of potential subcontracting opportunities and to solicit bids.
- CM/GC will ensure that MWESB subcontractors have an equal opportunity to compete for work by providing all subcontractors the same information and informing all subcontractors of the date and time that sub-bids are due.
- Bidders will enter MWESB contact information into the MWESB Contact Log. All columns shall be completed, where applicable by trade or specification.

e) Provide District with recommended sub-contractor award by bid package for District's review and acceptance as detailed below:

i. Breakdown of bids received including allowances as required to develop "apple-to-apple" comparison of bids.

ii. Financial impact analysis for modifying sub-contractor award to "lowest-responsible-MWESB bid" for each bid package.

iii. Risk assessment of using proposed sub-contractor firms.

f) Provide all public notices required to be in compliance with ORS requirements or as required by PPS procurement rules and/or direction.

g) Facilitate document control functions and provide necessary documents to sub-contracting community for bidding.

ALLOWABLE COST OF WORK MATRIX

	Description	Unit	Unit Price	Construction Costs Paid by Owner: Direct Cost of the Work	Construction Costs Paid by Owner: General Conditions Work	Costs Included in CM/GC Fee	Misc. Costs Paid by Owner
PROJECT STAFFING/LABOR							
1	Principal In Charge	Hr.				X	
2	Project Executive (for project specific time only)					X	
3	Senior Project Manager (for project specific time only)				X		
4	Project Manager				X		
5	General Superintendent (for project specific time only)				X		
6	Project Superintendent				X		
7	Site/Area Superintendents				X		
8	Project Engineers				X		
9	Field Engineers				X		
10	General Foreman				X		
11	Working Foreman for Direct Cost of the Work			X			
12	Working Foreman for General Conditions Work				X		
13	Project Admin (in support of site personnel)				X		
14	Estimator				X		
15	Scheduler				X		
16	QA/QC Engineer (for project specific time only)				X		
17	Commissioning Agent						X
18	BIM Manager				X		
19	MEP Coordinator				X		
20	LEED Coordinator				X		
21	Safety Coordinator (site based)				X		
22	Detailer for Direct Cost of the Work			X			
23	Detailer for General Conditions Work				X		
24	Wages (including labor burden) for CM/GC self-performed work associated with Direct Cost of the Work			X			
25	Wages (including labor burden) for CM/GC self-performed work associated with General Conditions Work				X		
26	Wages (including labor burden) for all other CM/GC staff not specifically identified within this matrix					X	
27	All Sick Leave					X	
28	All Vacation Time					X	
29	All Disability Leave					X	
30	Subcontracts associated with Direct Cost of the Work			X			
31	Subcontracts associated with General Conditions Work				X		
32	All other subcontracts unless approved otherwise by District					X	
	SUB-TOTAL						
	JOBSITE OFFICE & EXPENSES						
33	Office Trailer Rental	Mnth			X		
34	Jobsite Office material costs and expendables				X		
35	District & A/E Temp Office Rental (Furnished by CM/GC)						X
36	Office Furniture/Equipment				X		
37	Computers, Printers, Copiers, Software and other IT equipment/systems at site				x		
38	Plans & Specifications for sub bidding				X		
39	Plans & Specifications for day-to-day job operations				X		
40	As-builts				X		
41	Warranties				X		
42	Public Notices				X		
43	Publications/Advertisements				X		
44	Postage/FedEx				X		
45	Project Photos				X		
46	Drinking water, Coffee/Tea, Ice, Cups				X		
47	Project meals for team meetings not including PPS					X	
48	Petty Cash				X		
49	Office Supplies				X		
50	Storage Trailer rental				X		
	SUB-TOTAL						
	INSURANCE & BONDS						
51	Insurance GL (In accordance with District contract only)	Imp		X			
52	Builder's Risk	Imp					X
53	General Contractor Bond	Imp			X		
54	Subcontractor Bonds	Imp		X			
55	Subguard				X		
	SUB-TOTAL						
	PERMITS						
56	Demolition / Haz Mat/ Haul Permit			X			

ATTACHMENT H

ALLOWABLE COST OF WORK MATRIX

57	Noise Permit			X			
58	Grading Permit			X			
59	Foundation Permit			X			
60	Building Permit						X
61	Tree Permit			X			
62	Trade Permits			X			
	SUB-TOTAL						
	TEMPORARY FACILITIES & UTILITY EXPENSES						
63	Mobilization/Demobilization				X		
64	Project Signage				X		
65	Temporary telephone/internet connection				X		
66	Temporary/Haul Roads and Work Pads				X		
67	Temp utility bills						X
68	Temporary Toilets				X		
69	Temporary Water				X		
70	Temporary Fencing				X		
71	Temporary Enclosures (Inc. covered walkways & lights)				X		
72	Temporary Stairs				X		
73	Temporary Power & Equipment				X		
74	Temporary HVAC Service & Equipment				X		
75	Temporary Storage Facilities				X		
76	Temporary Road				X		
77	Weather protection				X		
	SUB-TOTAL						
	PROFESSIONAL & VARIOUS SERVICES						
78	Soils report						X
79	Testing and Inspections						X
80	Re-testing of failed Inspections					X	
81	Facility training				X		
82	Value engineering				X		
83	Legal					X	
84	Photography				X		
85	Computer					X	
86	CPM					X	
87	Layout & Surveying				X		
88	Accounting/Data Processing					X	
89	Engineering					X	
90	Engineering for performance spec work			X			
	SUB-TOTAL						
	SAFETY & SITE SECURITY						
91	Safety meetings & stand-downs				X		
92	Safety Treatments & Arrangements				X		
93	Safety equipment for CMGC personnel. Subs provide own in COW.				X		
94	First Aid Kits & supplies for CMGC personnel. Subs provide own in COW.				X		
95	Safety railing and nets				X		
96	Safety Signage				X		
97	Hard Hats, Goggles, Gloves, etc.				X		
98	Safety incentive programs, t-shirts, lunches					X	
99	Security				X		
100	Flagging/Traffic control				X		
101	Opening Protection				X		
102	Barricades & Lights				X		
103	Walkie Talkies				X		
	SUB-TOTAL						
	POLLUTION CONTROLS						
104	Dust Control				X		
105	Noise Control				X		
106	Erosion Control				X		
107	Pollution Control				X		
	SUB-TOTAL						
	TRANSPORTATION, HANDLING, CONVEYANCE & FREIGHT						
108	Project vehicle rental	Day			X		
109	Project vehicle fuel/maintenance				X		
110	Parking/Shuttles				X		
111	Personal vehicle mileage				X		
112	Man-lift Materials and Rental				X		
113	Man-lift Erect/Dismantle				X		
114	Man-lift operator				X		
115	Crane rental				X		
116	Forklifts				X		

ATTACHMENT H

ALLOWABLE COST OF WORK MATRIX

117	Freight & Transport Costs (inc. manpower, Overseas Freight, Inland Trucking, Custom Clearance, Brokerage Fee)				X		
118	Trash chute				X		
119	Miscellaneous Hauling & Errands				X		
120	Material Handling & Distribution				X		
121	Dump permits/fees				X		
122	Trash removal/Hauling				X		
	SUB-TOTAL						
	EQUIPMENT, RENTALS & MAINTENANCE						
123	Material & Equipment related to Direct Cost of the Work			X			
124	Rental-Contractor Owned equip (less than $2000 will be purchased)			X			
125	Flatbed truck rental/operation				X		
126	Flatbed truck fuel/maintenance				X		
127	Mobile Crane				X		
128	Tower Crane				X		
129	Tower Crane Foundation				X		
130	Manhoist				X		
131	Manhoist Foundation				X		
132	Truck				X		
133	Forklift				X		
134	Generators				X		
135	Pumps				X		
136	Fuel				X		
137	Maintenance				X		
138	Water truck (for general site maintenance)				X		
139	Air Compressor (for general site maintenance)				X		
140	Water pumping equipment				X		
141	Other dewatering equipment				X		
142	Equipment rental -third party			X			
	SUB-TOTAL						
	SMALL TOOLS						
143	Small Tools & Maintenance (less than $2000 will be purchased)				X		
	SUB-TOTAL						
	CLEAN UP						
144	Periodic Cleanup				X		
145	Final cleanup				X		
146	Rubbish Service				X		
	SUB-TOTAL						
	MISCELLANEOUS & OTHER						
147	Travel, Hotel, Per Diem and related Costs for District requested travel						X
148	Travel, Hotel, Per Diem and related Costs for site based staff				X		
149	Bonuses					X	
150	Warranty					X	
151	Entertainment					X	
152	Company Meeting					X	
153	Company Sponsored Party					X	
154	Corrective work not due to contractor fault						X
155	All other Corrective/Non-conforming Work					X	
156	Liquidated damages					X	
157	Costs of the work that cause the GMP to be exceeded					X	
	SUB-TOTAL						
	PROJECT TOTAL						

NOTE: Anything not specifically delineated herein is considered a part of the General Conditions Work

Portland Public Schools
School District 1J
Multnomah County, Oregon

Request for Proposals
Benson High School Modernization

RFP No. 2018-2536

Proposals Due:	**Not Later than 2:00:00 PM Pacific Time, March 21, 2019** Late proposals will not be accepted or considered.
Submit Proposals to:	**Physical Address:** Portland Public Schools Bid Desk Purchasing & Contracting 501 N. Dixon Street, 2nd Floor, Area 264 Portland, Oregon 97227 **Mailing Address:** Portland Public Schools Purchasing & Contracting Bid Desk PO Box 3107 Portland, Oregon 97208-3107
Direct Questions to:	**Procurement Contact:** Kimberley Alandar Email: purchasing@pps.net Phone: 503-916-3804 **Deadline for Questions: February 28, 2019**
Electronic Responses:	Electronic responses are preferred.

Pre-Proposal Conference:

One **mandatory** pre-Proposal conference will be held on **February 14, 2019, at 4:00 PM** at Benson High School, located at 546 NE 12th Avenue Portland, OR 97232. **Attendance is mandatory.** Portland Public Schools conducts such meetings in order to clarify information provided in the RFP and to provide interested proposers an opportunity to ask questions about the RFP. Statements made by the District's representatives at the conference are not binding on the District unless confirmed by written addendum.

RFP Availability:
This RFP is available electronically through the PlanetBids website at: http://www.planetbids.com/portal/portal.cfm?CompanyID=22555. Interested parties must be registered with PlanetBids to obtain and download documents. Registration is at no cost. Future notices regarding this solicitation, including solicitation addenda, will be posted to PlanetBids.

Proposal Opening:
A 2:05 PM public Proposal Opening will be held in the Mahonia Conference Room located at the Blanchard Educational Service Center, Floor L2, 501 N. Dixon Street, Portland Oregon, 97227. Only the name of the proposer will be read aloud.

1 Introduction 4
1.1 About Portland Public Schools 4
1.2 Equity and Certified Business Participation 4
1.3 Timeline 5
1.4 Definitions 5
1.5 RFP Questions, Clarifications and Changes 6
1.6 Equity in Public Purchasing and Contracting 6
1.7 Partnerships 7
1.8 Owner Controlled Insurance Program ("OCIP") 7
2 Project Overview 8
2.1 Background 8
2.2 Project Definition 8
2.3 Scope of Work 8
2.4 Project Team 9
2.5 Contractor and Subcontractor Fingerprint-Based Criminal History Verification 9
3 Proposal Format, Content, and Submission 10
3.1 Proposal Format 10
3.2 Proposal Content 10
3.3 Proposal Responses to Evaluation Criteria 11
3.4 Proposal Submission 16
4 Proposal Evaluation and Award 16
4.1 Clarification of Responses 16
4.2 Proposal Evaluation 16
4.3 Notice of Intent to Award 18
4.4 Negotiable Items 18
4.5 Negotiation 18
4.6 GMP – Guaranteed Maximum Price 18
4.7 Reservation of Rights 18
5 Solicitation Terms and Conditions; Protest of Solicitation or Award 19
5.1 Solicitation Document 19
5.2 Proposer Cost of Response Preparation 19
5.3 Submitted Materials are District Property 19
5.4 Proposal Validity 19
5.5 Solicitation Cancellation, Rejection of a Proposal or All Proposals 19
5.6 Disputes 19
5.7 Publicity 19
5.8 Preference for Recycled Materials 19

5.9 Performance within state of public printing, binding and stationary work 19
5.10 Confidentiality 20
5.11 Protests 20
6 Contract Terms and Conditions 22
6.1 Contract Award and Term 22
6.2 Portland Public Schools Contract 22
6.3 Prevailing Wages 22
6.4 Public Works Bond 24
6.5 State OCCB Registration Requirements 24
6.6 Contractor Contract Execution 24
6.7 District Contract Execution 24
6.8 Proposal Security 24
6.9 Insurance 24
6.10 Asbestos Abatement 24

Attachment A: **Sample CM/GC Contract, General Conditions and Exhibits**

Attachment B: **Proposer Information Form**

Attachment C: **Reference Form**

Attachment D: **Career Learning Equity**

Attachment E: **OCIP Manual and Enrollment Forms**

Attachment F: **Workforce Training and Hiring Program**

Attachment G: **Preconstruction Scope of Work**

Attachment H: **Allowable Cost of Work Matrix**

Attachment I: **Link: Benson Polytechnic High School Site Specific Educational Specification & Master Plan Report, Dated December 11, 2018**

Attachment J: **Link: Pre-Design Diligence Report**

Attachment K: **District's Benson Project Website: bensonbond.pps.net**

1 Introduction

Portland Public Schools ("District") seeks written proposals from qualified vendors able to provide CM/GC services for The Benson High School Modernization project. The general scope of the Project will include, but is not limited to, pre-construction services, site investigation, hazardous material abatement, selective demolition, renovation of existing building, new construction, and site work.

The District intends to award a single contract as a result of this RFP. The contract term will be approximately from March 2019 through December 2024.

1.1 About Portland Public Schools

Portland Public Schools, founded in 1851, is an urban school district in Portland, Oregon. With approximately 47,000 students in 85 schools, it is one of the largest school districts in the Pacific Northwest. Diverse programs and learning opportunities are supported by teachers, families, community members, nonprofit organizations, local businesses and higher education institutions. As the District strives to provide educational facilities that meet the diverse, ever changing needs of student populations, it is critical that the means and methods for doing so are consistent with the District wide goals for equity, sustainable practices, seismic safety, historic preservation and accessibility.

Every District school shall provide an equitable and effective learning environment that reflects the needs of all learning styles and maximizes the achievement of every student. As a part of the Bond Program, consultants will be expected to create school facilities that support and enhance evidence-based and emerging best practices including concepts such as the Seven Styles of Learning.

As outlined in the Racial Educational Equity Policy, the District is committed to the success of every student in each of our schools and is aware of the disparities that contribute to the achievement gap. Committed to understanding and changing institutionallzed racism and its impact on student learning, the District is prioritizing equity transformation initiatives. By addressing the quality, aesthetics and functionality of learning environments, the District can adapt to current educational and cultural goals while meeting modern building standards

1.2 Equity and Certified Business Participation

The District strives to achieve race and gender equity and expects any firm contracting with Portland Public Schools to do the same. The District is dedicated to increasing contracting opportunities for Minority Business Enterprises (MBE), Women Business Enterprises (WBE), businesses owned by Service Disabled Veterans (SDV) and/or Emerging Small Businesses (ESB) and also for minority and women workforce development.

One of the considerations for selection of a CM/GC will be the demonstrated willingness and ability of the proposer to work creatively with the District to identify projects and opportunities, and develop appropriate solicitation and contract procedures, to successfully engage Certified Business contractors and subcontractors. The District will monitor the CM/GC's Certified Business utilization throughout the project and will expect regular progress reports from the CM/GC on Certified Business outreach efforts and subcontractor engagement.

1.3 Timeline

ACTIVITY	DATE
Issuance of Request for Proposal	February 7, 2019
Pre-Proposal Conference	February 14, 2019
Deadline for Questions or Clarifications	February 28, 2019
Deadline for Final Addenda	March 7, 2019
Proposals Due	March 21, 2019
Interviews	April 3, 2019
Notice of Intent to Award	April 5 or 8th
Anticipated Notice to Proceed for Pre-Construction Services	May 15,, 2019
Anticipated Date to Finalize GMP	February 2020
Anticipated Notice to Proceed for Construction Services	March 2020
Anticipated Substantial Completion Date	April 2024
Project Completion Date – Building Turned over to District	
FF&E/District Move In/Commissioning	June 2024
Project Completion Date –Turned over to District	July 2024

The District reserves the right to deviate from this schedule.

PLEASE NOTE: After an Intent to Award has been issued, all Offerors are welcome to view the solicitation and evaluation file at District offices. However, a debrief and/or copies of documents in the solicitation file will not be available until after a contract has been fully executed.

1.4 Definitions

1.4.1 **"Construction Manager/General Contractor (CM/GC)"** is a form of Procurement or Alternative Contracting Method that results in a Public Improvement Contract for a Construction Manager/General Contractor to undertake Project team involvement with design development; constructability reviews; value engineering, scheduling, estimating, and subcontracting services; establish a GMP to complete the Contract Work; act as General Contractor; hold all subcontracts, self-perform portions of the Work as may be allowed by the District under the CM/GC Contract; coordinate and manage the building process; provide General Contractor expertise; and act as a member of the Project team along with the District, Architect/Engineers, and other Consultants. The District believes this project is a good candidate for the CM/GC project delivery method due to the scheduling challenges, complexity, specialty construction involved, and coordination among multiple disciplines and AHJ's.

1.4.2 **"Guaranteed Maximum Price" ("GMP")** means the total maximum price provided to the District by the Contractor, and accepted by the District, that includes all reimbursable costs of and fees for completion of the Contract Work, as defined by the Public Improvement Contract, except for material changes in the scope of Work. It may also include particularly identified contingency amounts.

1.4.3 **"Work"** means the furnishing of all materials, equipment, labor, and incidentals necessary to successfully complete any individual item or the entire Contract, and successful completion of all duties and obligations imposed by the Contract.

1.4.4 **"Certified Business",** as used in this RFP, means a company certified by the State of Oregon Certification Office of Business Inclusion and Diversity (COBID) as a Minority Business Enterprise (MBE), a Women Business Enterprise (WBE), business owned by Service Disabled Veteran (SDV), and/or an Emerging Small Business (ESB) pursuant to Oregon Revised Statutes Chapter 200; and/or

A company certified in the States of Oregon, Washington and California by the U.S. Department of Transportation (U.S. DOT) as a Disadvantaged Business Enterprise (DBE) pursuant to Code of Federal Regulations (CFR) Title 49, Subtitle A, Parts 23 and 26; and/or

A company certified by the State of Washington Office of Minority and Women's Business Enterprises (OMWBE) as a Minority Business Enterprise (MBE) and/or Woman Business Enterprise (WBE) pursuant to Washington Administrative Code, Title 326, Chapter 326-20.

Additional definitions are provided in the Portland Public Schools Public Contracting Rules, adopted December 17th, 2012: http://www.pps.k12.or.us/departments/purchasing-contracting/7013.htm

1.5 RFP Questions, Clarifications and Changes

Any Proposer requiring clarification of the information provided in this solicitation must submit specific questions or comments in writing to the Procurement Contact shown on page 1 of this document. Email is the preferred form of written communication. The deadline for submitting such questions is shown on page 1 of this document.

If selected for award, a proposer will be expected to execute a contract with the material terms and conditions of the sample contract included with the solicitation documents. The material terms and conditions of the sample contract may be modified at the sole discretion of the owner upon determination that the modification is in the best interest of the owner. NOTE: Any changes to contract terms and conditions will not be entertained at any stage of the project except as specified in Section 6.2 of this RFP.

If the proposer selected for award as a result of this RFP fails to agree to a contract with the material terms and conditions of the sample contract attached, the District may terminate negotiations with the proposer and commence negotiations with the next highest ranked proposer.

1.5.1 Addenda

If the District determines that additional information or interpretation is necessary, such information or interpretation will be supplied in addenda, posted on PlanetBids.

Those who have registered their interest in the solicitation through PlanetBids will be notified of addenda via email. Addenda shall have the same binding effect as though contained in this RFP. The Director of Purchasing & Contracting or designee shall issue all addenda not less than 3 days prior to the submission deadline.

Statements made by the District's representatives are not binding on the District unless confirmed by written addendum.

1.6 Equity in Public Purchasing and Contracting

Through the Equity in Public Purchasing and Contracting Policy, the District is committed to increasing contracting opportunities for Certified Businesses. The Superintendent annually determines District aspirational goals for participation of Certified Businesses on identified District projects or programs. The District aspires to achieve 18% Certified Businesses participation on consultant service contracts and public improvement contracts.

1.6.1 Career Learning Equity

The District will continue to partner with its awarded Contractors and Consultants to provide career learning opportunities for students, providing them exposure to various potential career paths, including, but not limited to, architecture, engineering and related services, legal and accounting services through programmatic involvement with the District's Career Pathways Program and Career Related Learning Experiences. (See Attachment D)

1.6.2 Contractor Workforce Equity

a. **Applicability**. Upon being awarded a District Public Improvement Contract or a District Intergovernmental Agreement for Construction or Public Improvement with a value greater than $200,000, a Contractor shall be obligated to comply with the District Contractor Workforce Equity protocols (See Attachment F). The District has contracted with the City of Portland for assistance in program administration and compliance. The Contractor Workforce Equity protocols shall apply to:

   1) The prime contract; and

   2) Any subcontract greater than $100,000.

b. Contractor Workforce Equity Protocols.

1) Contractor will ensure that a minimum of 20% of labor hours in each apprenticeable trade performed by the contractor and subcontractors on District projects are performed by state-registered apprentices, and

2) Contractor will utilize outreach, partnership and recruitment with workforce organizations, trade apprenticeship programs and unions to create an apprenticeship program that reflects the diversity of the Portland metropolitan area.

c. Certified Business Utilization Reporting

The District has implemented an online Certified Business utilization tracking system. This web-based software system facilitates Certified Business utilization reporting for all construction, architecture, engineering, and related services contractors doing business with Portland Public Schools. The system is designed to streamline and automate subcontractor utilization reporting requirements and includes the following key features:

- Automated tracking of Certified Business utilization
- Online verification of subcontractor payments
- Automated communication with contractors via email regarding reporting status

Prime contractors will be required to use the online system to submit first tier subcontractor data and monthly reports on progress payments to all subcontractors. Subcontractors will be required to use the online system to verify payments received from prime contractors, identify any further tiers of subcontractors, and submit monthly reports on progress payments to their own subcontractors. Prime contractors and subcontractors must access the system at least monthly, when prompted, to manage contract information and provide the required subcontractor and payment information. Prime contractors are responsible for ensuring that all subcontractors comply with the utilization tracking requirements. The Certified Business utilization tracking system is online at https://pps.diversitysoftware.com. Access information will be provided to the designated point of contact for each contractor after contract award.

1.7 Partnerships

It is the goal of the District to provide opportunities for smaller general contractors for portions of the construction project. To this end, the District strongly encourages partnerships between larger and smaller general contractors. Proposals submitted by multiple firms submitting as partners or joint ventures will be considered provided that any such proposal:

a. Is accompanied by a letter of intent between all the parties who comprise the consortium, partnership, or joint venture; and

b. Includes a certification by each member of the consortium, partnership, or joint venture that each member agrees to, and is bound by, all terms and conditions of this RFP.

1.8 Owner Controlled Insurance Program ("OCIP")

Portland Public Schools has implemented an OCIP for the on-site insurance requirements for this solicitation as described in Attachment E. The program includes on-site coverage for the following lines of insurance for all enrolled contractors and sub-contractors:

a. Commercial General Liability

b. Excess Liability

c. Contractors Pollution Liability

All bid prices should EXCLUDE those costs relating to the insurance provided by the OCIP.

The duration of the OCIP program will be from the contract's Notice to Proceed through final acceptance. Off-site coverage is not a part of the OCIP and contractors will be required to provide appropriate evidence of this coverage.

2 Project Overview

2.1 Background

The 2017 Capital Improvement Bond includes funding to rebuild Benson Polytechnic High School to allow for full modernization of the school's facilities. Benson High School has long been a highly regarded hub of technical education for PPS that serves all neighborhoods within the district. The master plan includes a combination of renovation and new construction to fully modernize the facilities and infrastructure and support needed capacity. It has a number of historic structures that will be renovated that have original construction dates ranging from 1916 to 1992.

2.2 Project Definition

The modernization of Benson Polytechnic will restore the historic 1916 Main Classroom building, the 1927 Old Gymnasium, the 1930 Auditorium Building, and Foundry Building that were both constructed in 1916. Renovations will also include the 1960's Gym, 1992 Radio Building, and 1990's library and health services addition. New construction will include a Commons/central classroom/kitchen addition, 2 story north and south CTE and classroom wings and site improvements. The proposed building area will be +/-365,000 sf with approximately 230,000 SF of historically significant renovation and 135,000 SF of new construction.

The design will bring current technology and teaching practices into new spaces, while trying to maximize flexibility for future use and technology as well. Internal layouts of core academic classrooms and CTE programs will provide adjacencies that promote shared resources and learning that does not currently exist. The design will look to maximize opportunities for daylighting as well. The design will seek to integrate as many of these considerations as possible, and in a manner that will reinvigorate Benson Polytechnic as national model for career learning based education.

The successful CM/GC will demonstrate expertise in: Providing CM/GC services on complex projects greater than $100M, working on constrained and occupied project sites, partnering with Certified Businesses (MBE/WBE/SDV/ESB), Authorities Having Jurisdiction applicable to this site, projects with multiple stakeholders, and projects involving historic rehabilitation and renovations.

Construction is planned to commence summer of 2021 with three subsequent one year school occupied phases and site work completion December 2024. The CM/GC will provide information for analysis of off-site swing to Marshall High School to determine cost and schedule impacts.

2.3 Scope of Work

2.3.1 **Pre-Construction Services**

Preconstruction Services for the Project shall be provided as described within Attachment G – Preconstruction Scope of Work.

2.3.2 **Construction Services**

The CM/GC shall provide Construction Services to fully construct the Benson Polytechnic Modernization Project ("the Work") as defined within the Contract Documents that shall be developed in conjunction with the CM/GC as a part of the Preconstruction Services.

2.3.3 **Certified Business**

The CM/GC must be familiar with the total local labor and subcontracting market, particularly Certified Businesses, and be capable of soliciting subcontracts without discrimination against race, color, or national origin, for consideration of any contract entered into pursuant to this project.

Additionally, the CM/GC will work creatively in collaboration with the District to identify work and establish procedures and processes to successfully engage minority and women businesses in this work. ☐

2.4 Project Team

District	
Project Director	Brian Oylear
Project Manager	Jamie Hurd
Project Design Manager	Jen Sohm
School Principal	Curtis Wilson Jr

Bassetti Architects	
Principal in Charge	Caroline Lemay
Design Principal	Lorne McConachie
Project Manager	Joe Echeverri
Project Architect	Patrick McLaughlin

2.5 Contractor and Subcontractor Fingerprint-Based Criminal History Verification

The District requires all Contractor personnel working on school sites to pass the District fingerprint-based criminal history verification. The Contractor is solely responsible for the cost of these verifications. The current cost is $94.50 and is subject to change. Proposers are advised to consider this cost when responding to price proposal evaluation criteria as the District will not pay for, or reimburse, such costs. Additional information about this verification process may be found at: https://www.pps.net/Page/184.

Contact with Students. "Unsupervised contact" with students means contact that provides the person opportunity and probability for personal communication or touch with students when not under direct District supervision. As required by ORS 326.603, Contractor shall ensure that Contractor, any subcontractors, and their officers, employees, and agents will have no direct, unsupervised contact with students while on District property. Contractor shall work with District to ensure compliance with this requirement. If (1) the work site is not a "closed site" as described below, and (2) Contractor is unable to ensure through a security plan that none of its officers, employees, or agents or those of its subcontractors will have direct, unsupervised contact with students in a particular circumstance or circumstances, then Contractor shall notify District before beginning any Work that could result in such contact. Contractor authorizes District to obtain information about Contractor and its history and to conduct a criminal background check, including fingerprinting, of any Contract officers, employees, or agents who may have unsupervised contact with students. Contractor shall cause its employees and/or subcontractors, if any, to authorize District to conduct these background checks. Contractor shall pay all fees assessed by Oregon Department of Education for processing the background check. District may deduct the cost of such fees from a progress or final payment to Contractor under this Contract, unless Contractor elects to pay such fees directly. All Contractors and their employees whether full time or part time working at closed sites must undergo a criminal history verification for disqualifying convictions per ORS 342.143 Criminal history verification checks will be conducted at the Contractor's expense, by the District Security Services or an approved third party vendor.

Closed Sites. At District sites that are closed for construction or other purposes, Contractor fingerprinting is not required. However, all Contractors and their employees whether full time or part time working at closed sites must undergo a criminal history verification for disqualifying convictions per ORS 342.143. Criminal history verification checks will be conducted at the Contractor's expense by the District Security Services or an approved third party vendor. Prior to entry of a Contractor's employees onto a jobsite, the Contractor shall provide a list of its employees who have successfully undergone the criminal history verification check.

3 Proposal Format, Content, and Submission

3.1 Proposal Format

District proposal standards:

a) Proposal includes a one-page cover letter as the first page of the proposal.

b) Proposal includes Attachment B as the second page of the proposal.

c) Proposal addresses all evaluation criteria in the order presented in 3.2.

d) Proposal is 20 pages or less in length, not including references or other attachments.

e) Proposal is double-sided when possible. Double-sided sheets are considered equal to two pages.

f) Proposal is prepared simply and economically, and is comprised of recyclable and, ideally, recycled materials. Proposal is stapled rather than bound.

Please do not include sales or promotional materials as part of proposal unless requested.

3.2 Proposal Content

Include the content listed in Table 3.2-1. Responses must be in the same order as listed below. Concise and direct answers are encouraged.

Proposals shall include all designated mandatory requirements. Proposals lacking one or more of the mandatory requirements may be rejected as non-responsive. Mandatory requirements are designated by a check mark in the "Mandatory" column of Table 3.2-1 below.

3.2-1 **Table**

Proposal Content		**Mandatory**	**Scored**
Proposer Certifications and Representations, signed in ink or indelible pencil	Attachment B	☒	☐
Evaluation Criteria Responses			
A. Compliance Statements		☒	Pass/Fail
B. Company History		☒	Pass/Fail
C. Company Project Experience		☐	☒
D. Project Team		☐	☒
E. Project Understanding and Approach		☐	☒
F. Certified Business Participation Strategy		☐	☒
G. Price Proposal		☒	☒
References	Attachment C	☒	☐
Partnership – Letter of Intent		☒ for Partnerships	
Partnership - Certification		☒ for Partnerships	
Will your firm agree to a contract where the District applies an OCIP?	Yes ☐ No ☐	☒	

3.2.1 Attachment B: Proposer Certifications and Representations

Include a completed Attachment B: Proposer Certifications and Representations form, signed in ink or indelible pencil. If submitting electronically via PlanetBids, a scanned copy will be accepted. Digital and stamped signatures are not accepted. If providing an Offer as a partnership both firms must sign and date this form.

3.3 Proposal Responses to Evaluation Criteria

Address each of the following Evaluation Criteria completely, and in the order provided. **Partnerships must provide separate responses, respective to each company in the partnership, for Written Evaluation Criteria A, B, and C.**

3.3.1 Written Evaluation Criteria

A. Compliance Statements As an appendix added to the end of the Proposal, provide the following: i. Provide a confirming statement that the proposing firm has reviewed, understands and will comply with all requirements of Oregon public contracting law, including but not limited to, Prevailing Wage Requirements per ORS 279C.800 through ORS 279C.870. ii. Provide statement regarding current certification of registration with Oregon Construction Contractors Board (CCB) (include copy of certificate in the appendix) iii. Provide confirmation of current State of Oregon Business License (include copy in the appendix) iv. Statement that proposing firm is not barred to hold public contracts per Oregon Bureau of Labor and Industries (BOLI)	**Pass/Fail**
B. Company History Provide the following Company History information, either in the main body of the Proposal or as an appendix added to the end of the Proposal: i. The managing leadership names and titles and address of the Company office that is the primary office location for proposed Project personnel with a 50% or greater work commitment to the Project. ii. Year the Company was formed. iii. The region(s) served by the Company. iv. Ownership type and organization structure of the Company. Provide total size and breakdown of firm personnel by category (e.g., principals, project managers, construction managers, superintendents, estimators, schedulers, and other technical, clerical) for the office or location that would be managing this project. v. Annual dollar value of projects Company has constructed for each of the last 5 (five) years. Break out each year's work value into the following three categories: CM/GC delivery; Design/Build delivery; and Lump Sum Design/Bid/Build delivery. What is your anticipated volume for 2019? Provide a list of projects currently under contract as well as pending award with the anticipated completion date (and start date if appropriate). vi. Total bonding capacity (aggregate limit) of the Company. vii. Provide a document from your bonding agent (including name, contact person, email address and telephone number of your bonding agent) stating that the proposing firm has the single limit ability and available capacity to bond this project for an assumed construction contract value of $230M. viii. Bonding Rate that will be assessed for this Project (stated as a percentage of the contract value based upon a $230 million or greater GMP). ix. Builders Risk, stated as a percentage of the contract value based upon a $230 million or greater GMP for a 32-month period. x. Your company's EMR and OSHA Lost Time Accident Rate for the past five years.	**Pass/Fail**

C. Company Project Experience Provide a listing, in chronological order and in chart format, of Company's most recently completed projects of $100 million or more. A minimum of three (3) projects with major historic renovation is preferred. Information on these projects should include the following: i. Name of the owner, contact person, and current phone number ii. The architect, contact person, and current phone number iii. Location of the project, delivery approach (e.g., CM/GC, design build, etc.) and start/completion dates iv. A brief description of the job, including similar attributes/challenges to the Project v. Amount of Contract award or negotiated GMP (if applicable) vi. Final contract amount, total amount of change orders, and percent increase in contract amount due to change orders vii. Total project claims going to litigation/arbitration and their disposition. Provide the name of the client, type of dispute resolution, and synopsis of the issues, who initiated the proceedings and the status or outcome of any judgment. Please note that no disclosure of monetary amounts is required, only the status or outcome, including but not limited to "pending hearings", "in hearings", "judgment for Client/Contractor", "settled out of hearings", "case dismissed", "case withdrawn by..."	**Maximum Points Available:** **20**
D. Project Team Explain your proposed team organization, roles and responsibilities, and personnel qualifications in the following manner: i. Organization: Provide a Project organization chart showing Proposer's specific proposed staff for this Project, including all professional staff in the following areas: project management; corporate oversight and administration; engineering and estimating; and onsite construction supervision. Indicate the proposed percentage of their total workload that each person will be assigned to work on this Project during Preconstruction Phase Services, and Construction Phase Services. **ii.** Describe what roles the individuals listed on the chart will fill on the proposed team for this Project. Describe the prior experience, if any, of the team members working with each other on projects (please be specific). Provide a brief statement explaining why Proposer thinks they are the most qualified personnel for this Project, and what lessons learned they will bring from previous project experience to this Project. As an appendix added to the end of the Proposal, include the maximum of a two-page resume for all individuals listed in the chart. The resumes must include each individual's education; work history; length of tenure with the firm; prior work experience with similar projects and any experience working with public sector CM/GC projects (education preferred). Minimum Requirements: The following minimum requirements shall be required of the project team, 1. All field staff members must hold current OHSA-10 certification at the time construction begins 2. Project Manager and Superintendent must have current OHSA-30 certification at the time construction begins 3. By listing individuals in the Proposal, the Proposer guarantees that these individuals will be available to work on the Project at the approximate percentages shown. Proposer also guarantees that any individuals listed in the Proposal as a 50% (fifty percent) or greater work commitment to the Project will have their primary office location within 60 (sixty) miles of the Project. District further reserves the right to request a substitution of personnel if deemed to be in the best interest of the District.	**Maximum Points Available:** **25**

Note: It is the District's intent that the **Project Manager** shall be the single point of responsibility to the Project Team for the proposing firm throughout the Project.	
E. Project Understanding and Approach i. Describe Proposer's overall plan to complete the Project. Define "success" in the context of this project. Identify what Proposer considers to be the top challenges to success of this Project, and propose strategies to address those challenges. Identify the specific role or responsibility each Project Team member (including Owner and Architect) would take in this process. ii. Provide a detailed explanation of the services and deliverables to be provided by Proposer to the Owner during the Preconstruction phase. Describe the top five ways Proposer can contribute to the beneficial outcome of this Project during Preconstruction, and provide an example that demonstrates how Proposer provided this value in a previous project. Describe Proposer's philosophy regarding Early Work Amendments. iii. Describe Proposer's approach to working within and around an occupied site; the tools or measures proposed to be used for mitigating construction impacts to occupants and neighbors; and how Proposer will keep construction workers, staff, students and visitors on the site safe. Identify the specific role or responsibility each Project Team member (including Owner and Architect) will take in this process. iv. Discuss Proposer's approach to working with local community, City of Portland, PP&R, PBOT, Portland Landmarks Commission and local neighborhood associations to help educate and engage them. Discuss how Proposer will help them understand the construction process, address concerns and mitigate tensions to foster a positive experience for the community. v. Describe Proposer's methodology for assessing and mitigating budget and schedule risk, in the Preconstruction phase and in the Construction phase. Identify the role or responsibility each Project Team member (including Owner and Architect) will take in this process. vi. Provide in an appendix any proposed changes to the CM/GC contract and general conditions per Paragraph 6.2. (If no changes are proposed, no appendix is required.) Proposed substantive changes to contract terms, particularly those that shift risk to the District or add additional costs to the District, will be considered by evaluators in scoring this "Project Approach and Understanding" section.	**Maximum Points Available:** **25**
F. Certified Business Participation Strategy It is the expectation of the District that the CM/GC will develop an effective, thorough, and thoughtful approach to the recruitment of smaller general contractors and Certified Business subcontractors to perform work on this project. i. What about your business practices and approach to subcontracting will aid in the recruitment of Certified Business contractors on this project? Identify any Certified Businesses you plan to engage on this project and/or any trades you will target for Certified Business participation. ii. Based on your practices and approach, and based on your knowledge of the construction market, what is the percentage of Certified Business utilization you believe you can realistically achieve for this project? Describe your comprehensive strategy to maximize the percentage of Certified Business utilization for this project. iii. Describe your process of developing bid packages. How does this approach promote the ability of Certified Business contractors to bid on work?	**Maximum Points Available:** **20**

iv. Provide two examples of projects that have tracked Certified Business utilization (not including Federal DBE) and list the project owner, proposers Project Manager, and dates of work. Provide the stated original Certified Business utilization percentage goal, the Certified Business utilization percentage you achieved, the total construction value vs. the amount paid to Certified Business subcontractors, and the total number of subcontractors vs. the number of Certified Business subcontractors. Describe how you were successful in achieving this level of utilization. v. Specifically address the District's intention to provide opportunities for smaller general contractors. An ideal proposal will demonstrate: • Proposer has a comprehensive and detailed Certified Business utilization plan and has already engaged Certified Businesses as a significant part of the project team. • Proposer has a history of partnering and/or subcontracting with Certified Businesses to meet utilization goals. • Proposer has a realistic and attainable Certified Business utilization goal and plan for reaching that goal on this project.	
G. Price Proposal i. Provide the CM/GC fee based as a percentage of the Estimated Cost of the Work for this project. This fee, to be determined based on this percentage, must cover at a minimum, the Construction Management elements and Costs Excluded from Cost of the Work, as specified in the CM/GC Contract and specifically identified in the **ATTACHMENT H - Allowable Cost of the Work**. ii. Provide a not-to-exceed amount for all pre-construction phase services, to be billed hourly. Provide hourly all-inclusive billing rates and estimated man-hours for all project team personnel during the Pre-Construction Phase. iii. Provide a total amount based on the values given in sections G.i. and G.ii using the following formula. The price proposal section of the RFP will be evaluated solely on this total. ($230M x Fee %) + (Precon NTE Amount) = Total	**Maximum Points Available:** **10**
Written Evaluation Criteria Total	**Total Points Available:** **100**

3.3.2 **Interview Evaluation Criteria** Notes: The intent of the interview is to hear primarily from the proposed team (project manager and superintendent and other team members that the project team will interact with on a daily basis), with limited interaction (opening and closing remarks only) from executive or marketing personnel. **The following criteria categories (in bold) will be used to score the interview portion of the selection process.** Examples of the types of information that may be requested in the interview are shown below each category title. **Specific questions will be provided to short listed firms prior to the interview.**	
A. CM/GC Role in an Integrated Team How does the proposing firm view the role of the CM/GC and its staff when a part of a larger integrated project team? What process/approaches do the team members use to support better project outcomes in a collaborative/integrated environment?	**Maximum Points Available:** **35**
B. Key Personnel Experience What is the perceived value the proposed team members bring to the project team? How does the unique background of the proposed team members integrate with the backgrounds/skill sets of the other members of the project team? To what degree will the project benefit from the participation of the proposed team members?	**Maximum Points Available:** **35**
C. Risk Management How well does the proposed team's approach to representing the Owner's interests and risk identification/mitigation throughout the Project benefit the District? How well does the proposed teams' risk management philosophy translate into improved project outcomes? How will the proposing firms' use of technology result in better project outcomes?	**Maximum Points Available:** **35**
D. Equity and Diversity How does the proposing firm value diversity and inclusion of underrepresented communities? How is this represented in the demographics of your firm? What do you do differently than other firms to ensure a diverse workforce? What resources do you have to dedicate to this goal?	**Maximum Points Available:** **35**
E. Team Interaction PPS would like to have an interactive dialogue with key team members based on several questions or scenarios. Thirty minutes of the two hour interview will be set aside for this section. Questions may be about the proposal, other parts of the interview, directed at individuals, project specific, or scenario based. The CM/GC is encouraged to participate in the dialogue and also ask questions of the Owner.	**Maximum Points Available:** **60**
Interview Evaluation Criteria Total	**Total Points Available:** **200**

3.4 Proposal Submission

Electronic Submittal

If submitting electronically via PlanetBids, all required sections of the Proposal must be submitted through the website in accordance with the PlanetBids internal timestamp.

Hardcopy Submittal

If submitting in hardcopy, please provide one (1) hardcopy original proposal and 6 complete hardcopies to:

The Procurement Contact and Bid Desk location listed on the first page of this RFP.

Proposals are due no later than the due date and time shown on the first page of this RFP.

It is the Proposer's sole responsibility to ensure that its proposal is delivered and time-stamped, at the Bid Desk, prior to the RFP closing date and time.

Proposals not time-stamped at the Bid Desk by the due date and time shall be considered late. District shall deem such proposals ineligible for award consideration. The official time in which Proposals are due is located at the Purchasing & Contracting Bid Desk.

Proposals will be submitted in a sealed envelope, or box, with the following information provided on the outside of the package:

a) RFP Title

b) RFP number

c) Proposer name

d) Proposer Address

4 Proposal Evaluation and Award

4.1 Clarification of Responses

In the event that one or more proposals are in need of clarification, the District will request such clarification in writing and will afford the Proposer(s) contacted an opportunity to respond in kind, with the necessary clarification.

4.2 Proposal Evaluation

The evaluation process of this RFP will be comprised of a written proposal tier (Tier 1) and an interview/presentation tier (tier 2).

An Evaluation Committee, consisting of not less than three individuals, shall evaluate the proposals. Each evaluator will independently evaluate and score proposals in accordance with the Evaluation Criteria. The District may assign certain evaluators specific Evaluation Criteria, in alignment with the evaluator's expertise.

The District may appoint separate evaluation teams for each tier of the evaluation process.

4.2.1 Ranking of Proposals

Evaluations will be scored by rank. The highest-ranked proposal will be determined as follows:

a) Each evaluator will assign a ranking to each proposal, based on the total score on each proposal based on the evaluation criteria points.

b) The proposal to which the evaluator awarded the most points will receive an Evaluator Final Rank of 1. The proposal to which the evaluator awarded the second most points will receive an Evaluator Final Rank of 2, and so forth.

c) The District will then sum the Evaluator Ranks for each proposal. The proposal with the lowest total rank (the sum of all Evaluator Ranks) will be ranked first. The proposal with the second lowest rank will be ranked second, and so on. The proposal with the highest rank will be ranked last.

4.2.2 **Tier 1: Written Proposal Evaluation**

a) Each evaluator shall independently score and then rank written proposals in accordance with the Evaluation Criteria.

b) District Purchasing & Contracting department, or its designee, shall evaluate fee proposals.

c) The District shall sum the Tier 1 rankings per proposal for a total written evaluation ranking for each proposal.

4.2.3 **Establishment of the Competitive Range**

a) The District shall establish a Competitive Range after evaluating all responsive proposals in accordance with the Evaluation Criteria.

b) The District anticipates establishing a Competitive Range which will consist of a minimum of one or more Proposers.

c) The District will notify Proposers of the Competitive Range.

4.2.4 **Tier 2: Invitation for Interview**

a) The District will invite all Proposers in the Competitive Range to an interview with the Evaluation Committee.

b) No additions, deletions or substitutions may be made to proposals during the interview/presentation that cannot be viewed as clarification.

c) At the time of the interview, Proposers must address any requests for exception or confirm acceptance, with no changes, of the District sample CM/GC contract and general conditions incorporated as Attachment A. Any proposed changes to the sample CM/GC contract and general conditions must have been included as an appendix to the Proposal. NOTE: Any changes to contract terms and conditions will not be entertained at any stage of the project except as specified in Section 6.2 of this RFP.

4.2.5 **Tier 2: Interview Evaluation**

a) Each evaluator shall independently score and then rank the interview in accordance with the Interview Evaluation Criteria.

b) The District will sum the Tier 2 rankings per proposer for a total interview evaluation ranking for each proposal.

c) After scoring is completed, the District, if necessary, will apply tier weighting to the evaluator ranks.

d) The District will sum weighted Tier 1 total written evaluation rankings and the weighted Tier 2 total interview evaluation rankings to achieve a total rank per proposal.

4.2.6 **Best and Final Offers**

a) At its sole discretion, the District may require Best and Final Offers.

b) At its sole discretion, the District may re-establish the competitive range, based on written and interview rankings. If the District exercises this option, it will require Best and Final Offers from Proposers within the re-established Competitive Range.

c) In the event District requires Best and Final Offers, it shall establish a common date and time by which eligible Proposers must submit such Best and Final Offers. The District shall evaluate Proposals as modified by the Best and Final Offer, and based on the Evaluation Criteria.

d) If a Proposer does not submit a Best and Final Offer or a notice of withdrawal, the Proposer's original proposal shall be construed as its Best and Final Offer.

4.2.7 **References**

The District reserves the right to investigate references, including customers other than those listed in a Proposer's submission. This inquiry may include without limitation, investigation of past performance of any Proposer with respect to its successful performance of similar projects, compliance with specifications and contractual obligations, completion or delivery of a project on schedule, and its lawful payment of employees and subcontractors.

4.3 Notice of Intent to Award

The District shall notify Proposers of its Intent to Award by posting such notification on PlanetBids.

4.4 Negotiable Items

During negotiations, the District reserves the right to discuss, among other topics:

- Collaborative approach to CM/GC methodology
- Estimates of various project costs
- Various aspects of proposed services, scope of work and specific or work delivery
- Fees for pre-construction, construction and post-construction CM/GC services
- Lump Sum fees and hourly rates for various other services
- Sub-contracting, construction bidding, and award methodology
- Contract terms and potential changes to the Contract agreement and the amendments to that agreement that the District may wish to pursue.

4.5 Negotiation

4.5.1 After the District has issued the Notice of Intent to Award, the District will commence serial negotiations with the highest-ranked eligible Proposer.

4.5.2 At any time during negotiations, the District may terminate negotiations with the highest ranked Proposer, or the eligible Proposer with whom it is currently negotiating if the District believes that:

i. The eligible Proposer is not negotiating in good faith; or

ii. Further negotiations or negotiations with the eligible Proposer will not result in the parties agreeing to the terms and conditions of the final Contract in a timely manner.

4.5.3 If the District terminates negotiations with an eligible Proposer, the District may then commence negotiations with the next highest-ranked eligible Proposer.

4.5.4 The District reserves the right to negotiate final contract terms with the selected Proposer(s) to the fullest extent allowed by law and as in the best interest of the District.

4.6 GMP – Guaranteed Maximum Price

The District will negotiate an acceptable Guaranteed Maximum Price (GMP) with the CM/GC upon completion of Phase One (preconstruction services) and prior to commencement of Phase Two (construction).

If this collaborative process is not successful and no mutually agreeable resolution on GMP can be achieved with the Contractor, then the District must terminate the Contract. The District may then proceed to negotiate a new Contract (and GMP) with the Proposer that was next-ranked in the original selection process, or employ other means for continuing the Project under ORS 279C.

4.7 Reservation of Rights

The District may reject any Proposal not in compliance with all prescribed Public Contracting procedures and requirements, including the requirement to demonstrate the Proposer's responsibility under ORS 279C.375(3)(b),

5 Solicitation Terms and Conditions; Protest of Solicitation or Award

5.1 Solicitation Document

This solicitation document may be viewed at the Portland Public Schools Bid Desk, located at the Blanchard Educational Service District Building, 501 N. Dixon St., 2nd Floor, Portland, Oregon 97227.

5.2 Proposer Cost of Response Preparation

Proposers will bear sole responsibility for all costs incurred in preparing and providing their proposals in response to this RFP.

5.3 Submitted Materials are District Property

All materials submitted for any proportion of a Proposal in response to this RFP, or during any tier of this solicitation, will become the property of the District and will not be returned to proposers.

5.4 Proposal Validity

Proposals will remain valid for a period of 90 days following the Proposal submission deadline.

5.5 Solicitation Cancellation, Rejection of a Proposal or All Proposals

The District may cancel this Solicitation or reject any or all Proposals in accordance with ORS 279C.395.

The District is not liable to any Proposer for any loss or expense caused by or resulting from the cancellation of a solicitation or rejection of a Proposal.

5.6 Disputes

In case of any doubt or difference of opinion as to:

a) The items or service to be furnished under this RFP, or

b) The interpretation of the provisions of the RFP, the decision of the District will be final and binding upon all parties.

5.7 Publicity

News releases relating to this RFP will not be made without prior approval by, and in coordination with, the District Community Involvement and Public Affairs Department.

5.8 Preference for Recycled Materials

The District will give preference for Recycled Materials as set forth in ORS 279A.125 if:

a) The Recycled Product is available;

b) The Recycled Product meets applicable standards

c) The Recycled Product can be substituted for a comparable non-recycled product; and

d) The Recycled Product's costs do not exceed the costs of non-recycled products by more than 5%, or a higher percentage if the District makes such a written determination.

5.9 Performance within state of public printing, binding and stationary work

a) Except as provided in subsection (b) of this section, all printing, binding and stationary work, including the manufacture of motor vehicle registration plates and plates required to be affixed to motor carriers, for the state or any county, city, town, port district, school district, or other political subdivision thereof, will be performed within the state. All requests for proposals and all contracts for such work shall so stipulate.

b) The work referred to in subsection (a) of this section may be performed outside the state if it is established that:

i. The work cannot be performed within the state;

ii. The lowest price for which such work can be procured within the state exceeds the charge usually and customarily made to private individuals and corporations for work of similar character and quality; or

iii. All proposals for the work, or any part thereof, are excessive and not reasonably competitive.

5.10 Confidentiality

The District is subject to the Oregon Public Records Law (ORS 192.410 to 192.505), which requires the District to disclose all records generated or received in the transaction of District business, except as expressly exempted in ORS 192.501, 192.502, or other applicable law. Examples of such exemptions are: trade secrets (ORS 192.501 (2)) and computer programs (ORS 192.501 (15)).

The District will not disclose records submitted by a proposer that are exempt from disclosure under the Oregon Public Records Law, subject to the following procedures and limitations:

The Proposer shall mark all proposal pages containing the records it has determined as confidential under Oregon Public Records Law and shall segregate those pages in the following manner:

a) Such pages will be clearly marked "Confidential" on each page of the confidential document.

b) Proposer will separate confidential pages from its other Proposal pages by providing the confidential pages to the District in a separate envelope or package.

c) In its proposal, Proposer will cite the specific statutory exemption in Oregon Records Law exempting such pages from disclosure.

d) Items 5.10 a) and 5.10 b) will prevail in the event these provisions conflict with formatting or response instructions elsewhere in this document.

e) Proposers may not mark an entire Proposal confidential. Should a proposal be submitted in this manner, the District will hold no portion of the proposal as confidential, unless such a portion is segregated as per 5.10 b) and is determined exempt from Oregon Public Records Law.

Notwithstanding the above procedures, the District reserves the right to disclose information that the District determines, in its sole discretion, is not exempt from disclosure or that the District is directed to disclose by the Multnomah County District Attorney or a court of competent jurisdiction.

Prior to disclosing such information, the District will make reasonable attempts to notify the proposer of the pending disclosure.

5.11 Protests

5.11.1 Protest of Solicitation or Contract Documents

Any Proposer wishing to protest this RFP or any provision, specification or contract term herein, must submit such questions, comments or protests to:

The Procurement Contact and Bid Desk location listed on the first page of this RFP.

The deadline for submitting such protests is the same date as the deadline for questions listed on the first page of this RFP.

5.11.2 Content of Solicitation Protest

The prospective Proposer's written solicitation protest must include all of the following:

a) Sufficient information to identify the solicitation that is the subject of the protest;

b) The grounds that demonstrate how the procurement process is contrary to law or how the solicitation document is unnecessarily restrictive, is legally flawed, or improperly specifies a Brand Name;

c) Evidence or supporting documentation that supports the grounds on which the protest is based; and

d) A statement of the desired changes to the Procurement process or the solicitation document that the prospective Proposer believes will remedy the conditions upon which the prospective Proposer based its protest.

5.11.3 Protest of Contract Award

Adversely affected Proposers who wish to protest the Competitive Range, proposal rejection as non-responsive, the Intent to Award a contract, may do so providing:

a) The Proposer is adversely affected because the Proposer would be eligible to be awarded the contract in the event that the protest were successful: and

b) The reason for the protest is:

c) All higher-ranked proposals are non-responsive;

d) The District has failed to conduct the evaluation of Proposals in accordance with the criteria or processes described in the solicitation materials;

e) The District has abused its discretion in rejecting the protestor's Proposal as non-responsive or;

f) The District's evaluation of Proposals or the District's subsequent determination of Award is otherwise in violation of Portland Public Schools Public Contracting Rules or the Public Contracting Code.

An affected Proposer may only protest its exclusion from a tier of competition if the Proposer is responsible, submitted a responsive proposal and, but for the District's mistake in evaluating the Proposer's offer, or other Proposer Offers, the protesting Proposer would have been eligible to participate in the next tier of competition.

a) All protests must be in writing and physically received by the Senior Manager-Solicitations of Purchasing & Contracting or designee no later than 2:00 PM Pacific Time on the seventh (7^{th}) calendar day after the posted Notice of Intent to Award or postmarked rejection.

Address protest to:

PROTEST OF AWARD: RFP NO.2018-2536
Attn: Director, Purchasing and Contracting
Portland Public Schools
School District No.1J, Multnomah County, Oregon
501 North Dixon Street, 2^{nd} floor
Portland, OR 97227

b) Protests must specify the grounds for the protest including the specific citation of law, rule, regulation, or procedure upon which the protest is based. The judgment used in scoring by individual evaluators is not grounds for protest.

c) Protests not filed within the time specified in 1 above, or which fail to cite the specific law, rule, regulation, or procedure upon which the protest is based shall be dismissed. An issue that could have been raised by request for clarification or protest of specifications as provided in 5.11.1 is not grounds for protest.

6 Contract Terms and Conditions

6.1 Contract Award and Term

The District intends to award a single contract as a result of this RFP.

The contract term will be through completion and final acceptance of the project and expiration of the warranty period.

6.2 Portland Public Schools Contract

Proposers are advised to thoroughly review and familiarize themselves with the District sample CM/GC contract and general conditions incorporated as Attachment A.

The successful proposer will be invited to enter into a contract in substantially the form attached hereto as Attachment A. The District will entertain suggestions on the refinement of the CM/GC contract and its exhibits only when:

a) All such suggestions identify the specific contract clauses, sections, or paragraphs at issue and propose alternate language for each identified clause, section, or paragraph identified. (Please note that the District will not entertain unspecific requests to add or reconsider contract provisions.)

b) All such proposed changes are provided, in an appendix, with submission of the Proposal;

c) The general work scope remains the same;

d) The field of competition does not change as a result of material changes to the requirements stated in the RFP; and

e) Acceptance of the proposed change would not likely affect proposed CM/GC fees.

Objections or responses that materially alter the terms and conditions attached to this RFP may be deemed non-responsive and disqualify the vendor.

The intent of these provisions is to avoid any unfair competitive advantage or disadvantage in the procurement process. Alternative approaches to structuring the GMP are contemplated and allowable only under these provisions.

Any contract resulting from this RFP shall be based on the RFP documents and in compliance with Portland Public Schools Public Contracting Rules and the Public Contracting Code.

This Contract is for a Public Work and Contractor agrees to be bound by and will comply with the provisions of ORS 279C.838, ORS 279C.840, or 40 U.S.C.3141 to 3148.

6.3 Prevailing Wages

CM/GC and all subcontractors shall comply with ORS 279C.800 through 279C.870. The hourly rate of wage to be paid by CM/GC or any subcontractor to workers in each trade or occupation required for the public works employed in the performance of this Contract shall not be less than the specified minimum rate of wage in accordance with ORS 279C.838 and ORS 279C.840 for each trade or occupation as defined by the Commissioner of the Oregon Bureau of Labor and Industries ("BOLI") in the applicable publication entitled Definitions of Covered Occupations for Public Works Contracts in Oregon available at http://www.boli.state.or.us/BOLI/WHD/PWR/pwr_state.shtml.

The BOLI prevailing wage rates that will apply to the Contract shall be those in effect on the date that construction is first authorized to begin under the contract. This could occur prior to execution of the GMP Amendment if early work is authorized by an Early Work Amendment, or, if no early work is authorized, at the time the GMP Amendment is executed. Once established, the prevailing wage rates will then be in effect for the remainder of the CM/GC Contract. The prevailing wage rates that will apply will be those set forth in the then current version of the following BOLI booklet, together with any amendments to that booklet: "Prevailing Wage Rates for Public Works Contracts in Oregon". This document is available at http://egov.oregon.gov/BOLI/WHD/PWR/pwr_state.shtml. The Construction Phase Services will take place in Multnomah County, Oregon.

The fee required by ORS 279C.825(1) will be paid by the District to the Commissioner of the Bureau of Labor and Industries under the administrative rules of the Commissioner.

Prevailing wages shall be set at the time of commencement of construction.

6.4 Public Works Bond

Before starting Work, the successful Proposer shall file with the Oregon Construction Contractors Board, and maintain in full force and effect, the separate public works bond required by ORS 279C.836, unless otherwise exempt under those provisions. The successful Proposer shall also include in every subcontract a provision requiring each subcontractor to have a public works bond filed with the Oregon Construction Contractors Board before starting Work, unless otherwise exempt, and shall verify that the subcontractor has filed a public works bond before permitting the subcontractor to start Work.

A disadvantaged, minority, women or emerging small business enterprise certified under ORS 200.055 may, for up to four years after certification, elect not to file a public works bond as required under section 279C.836 (1).

6.5 State OCCB Registration Requirements

Proposers shall be licensed with the Oregon Construction Contractors Board prior to submitting a Proposal on this project. Failure to comply with this requirement shall result in Proposal rejection. Proposers shall insert Proposer's current, valid registration number and expiration date thereof in the spaces provided on the Proposal Form. Landscaping contractors and all subcontractors participating in this project shall be licensed respectively, by the State Landscape Contractors Board, as required by ORS 671.530 and the Oregon Construction Contractors Board, as required by ORS 701.026, at the time they propose to engage in subcontract work. Any Proposal received from a Proposer identified by the Oregon Construction Contractors Board as ineligible to hold public contracts in accordance with ORS 701.227 shall be disqualified from consideration.

6.6 Contractor Contract Execution

Prior to starting work under Phase II of the Contract, the selected Proposer shall provide a performance bond and a payment bond each issued by a surety satisfactory to the District, in an amount equal to the full dollar value of the Contract for the faithful performance of the Contract and all provisions thereof.

6.7 District Contract Execution

After receipt and acceptance of the properly executed Contract, Performance Bond, Payment Bond, and Certificates of Insurance, the District will execute the Contract and issue a Notice to Proceed. No work shall be performed until the Contract is fully executed and a written Notice to Proceed is issued.

6.8 Proposal Security

Proposal security is not required for compliance with this solicitation.

6.9 Insurance

Proposers are advised to carefully review the insurance requirements contained in the sample standard contract.

6.9.1 Insurance Certificates

Contractor will promptly provide Certificates of Insurance at the District's request.

6.10 Asbestos Abatement

The Contractor or subcontractor is required to possess an asbestos abatement license per ORS 468A.710.

PORTLAND PUBLIC SCHOOLS
Purchasing & Contracting
501 North Dixon Street • Portland, OR 97227
(503) 916-3405 • Fax: (503) 916-3109

Exhibit E

ADDENDUM NO. 1

March 6, 2019

RFP NO: 2018-2536

TITLE: Benson High School Modernization

PROPOSALS DUE: March 21, 2019 **NOT LATER THAN:** 2:00:00 PM

This Addendum modifies or clarifies the Solicitation Documents only to the extent indicated herein, and all portions thereof not specifically affected by the addendum shall remain in full force and effect. All addenda shall be added to and form a part of the Solicitation Documents.

Please acknowledge receipt hereof by inserting the above Addendum Number in the space provided on **ATTACHMENT B** of the Specification Documents prior to submission.

1. **ADDITIONS**
   - 1.1. **The pre-proposal attendance roster is hereby attached.**
   - 1.2. **Add Attachment L – Benson Asbestos Report**
   - 1.3. **Add Attachment M – Benson Lead Based Paint Survey**

2. **CHANGES**
   - 2.1. **The first paragraph of Written Evaluation Criteria 3.3.1 C. Company Project Experience is hereby removed and replaced with the following:**

     Provide a listing, in chronological order and in chart format, of Company's most recently completed **and/or in progress (at least 50% complete with construction)** projects of $100 million or more. A minimum of three (3) projects with major historic renovation is preferred. Information on these projects should include the following:

3. **CLARIFICATIONS**
   - 3.1 **The links for Attachment I and Attachment J are hereby corrected to the following: https://www.pps.net/Page/1838. The following documents can be found at this link:**
     - **Master Plan Report**
     - **Site Specific Ed Spec**
     - **Pre-Diligence Report**

4. **QUESTIONS / ANSWERS**
   - 4.1. Q: In the RFP meeting it was mentioned teams were strongly encouraged to limit proposals to 20 pages … RFP indicates the maximum allowed is 20 pages. We assume the maximum allowed is 20 pages as stated in the RFP ?

     A: Correct
   - 7.2. **Q:** Will the interview format be a team presentation addressing provided questions and other criteria (visual aids may be used) or will it be similar to the Lincoln HS presentation where the Selection Team provided questions just prior to the interview (no visual aids allowed)?

     A: This information will be provided to those firms selected for interviews.
   - 7.3. **Q:** Is there a current Hazardous Material survey that you can share with proposers?

     A: Please see Attachment L included with this Addendum.
   - 7.4. Q: Are the cover letter and Attachment B counted in the 20 page proposal limit?

     A: These are required documents and therefore not included in the page count.

Paul Williams, CPPB
Senior Manager Solicitations, Purchasing & Contracting

END OF ADDENDUM NO. 1

Portland Public Schools is an equal opportunity educator and employer

PORTLAND PUBLIC SCHOOLS
Purchasing & Contracting
501 North Dixon Street • Portland, OR 97227
(503) 916-3305 • Fax: (503) 916-3109

Exhibit F

ADDENDUM NO. 2

March 7, 2019

RFP NO: 2018-2536

TITLE: Benson High School Modernization

PROPOSALS DUE: March 21, 2019 **NOT LATER THAN:** 2:00:00 PM

This Addendum modifies or clarifies the Solicitation Documents only to the extent indicated herein, and all portions thereof not specifically affected by the addendum shall remain in full force and effect. All addenda shall be added to and form a part of the Solicitation Documents.

Please acknowledge receipt hereof by inserting the above Addendum Number in the space provided on **ATTACHMENT B** of the Specification Documents prior to submission.

1. CHANGES

1.1. Remove and replace Paragraph 1.3 Timeline with the following:

ACTIVITY	DATE
Issuance of Request for Proposal	February 7, 2019
Pre-Proposal Conference	February 14, 2019
Deadline for Questions or Clarifications	February 28, 2019
Deadline for Final Addenda	March 7, 2019
Proposals Due	March 21, 2019
Interviews	April 3, 2019
Notice of Intent to Award	April 5 or 8th
Anticipated Notice to Proceed for Pre-Construction Services	May 15,, 2019
Anticipated Date to Finalize GMP	February 2020
Anticipated Notice to Proceed for Construction Services	**March 2021**
Anticipated Substantial Completion Date	April 2024
Project Completion Date – Building Turned over to District	
FF&E/District Move In/Commissioning	June 2024
Project Completion Date –Turned over to District	July 2024

2. QUESTIONS / ANSWERS

2.1. Q: During the pre-proposal meeting it was clarified that the design phase was 2-years, and the construction phase was 3-years. This however was not noted in the addendum that was just released today. Would you please confirm the dates, or will another addendum be released?

A: A 2 year pre-construction phase and 3 year construction phase is correct.

Emily Courtnage
Director, Purchasing & Contracting

END OF ADDENDUM NO. 2

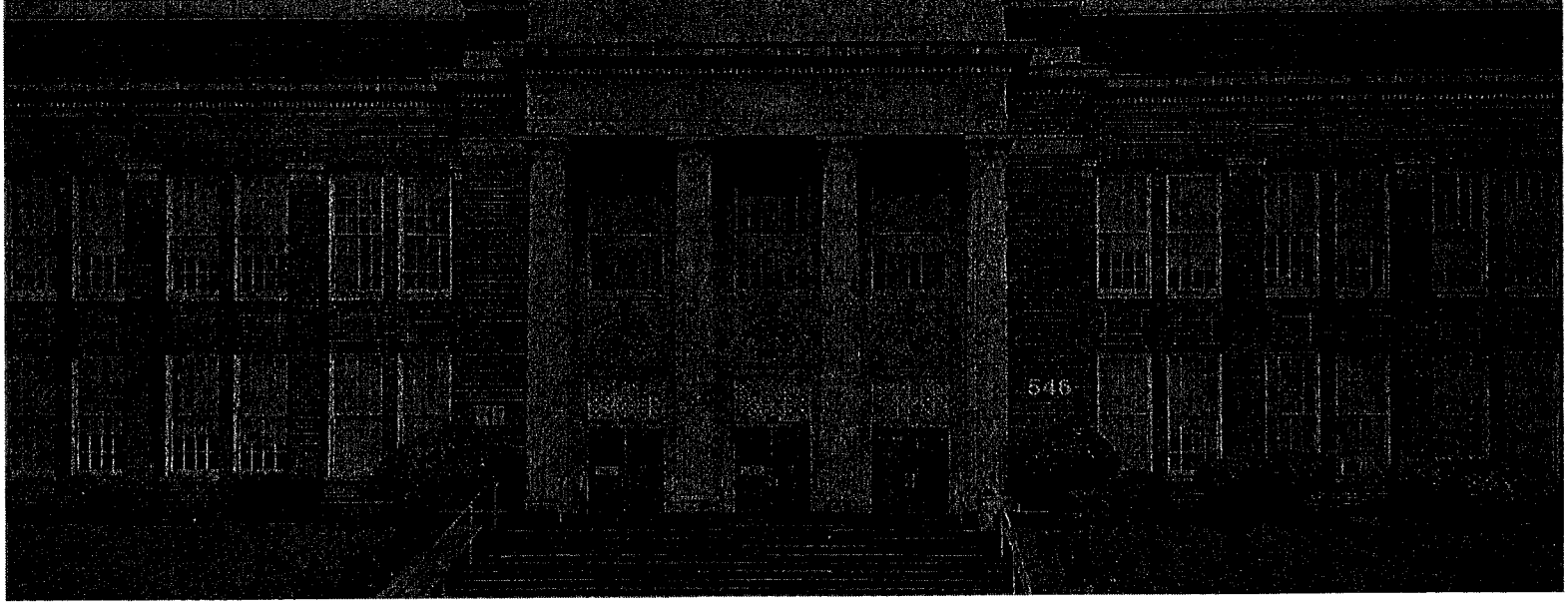
ANDERSEN CONSTRUCTION

PORTLAND PUBLIC SCHOOLS

BENSON HIGH SCHOOL MODERNIZATION

RFP NO. 2018-2536 • MARCH 21, 2019
REQUEST FOR PROPOSALS

Copy Not Included- Available Upon Request



ATTACHMENT H
Portland Public Schools
Career Learning Requirements

A. **Registration on PPS Partner Connect**

1) The Contractor is required to register on the District's Career Learning database tool, PPS Partner Connect, which is located at https://www.pps.net/partnerconnect
   - When registering, the Contractor must follow the detailed instructions attached.

2) The Contractor must offer Career Learning opportunities as follows:

   a) If this contract has a value between $100,000 and $1,000,000, Contractor must:
      - Register with PPS Partner Connect and offer at least two Career Learning opportunities to PPS students. For contracts lasting longer than one year, the Contractor must offer at least two opportunities every year during the active term of the contract.

   b) If this contract has a value greater than $1,000,000, Contractor must:
      - Register with PPS Partner Connect and offer at least four Career Learning opportunities to PPS students. For contracts lasting longer than one year, Contractors must offer at least four opportunities every year during the active term of the contract; and
      - Register to participate as an exhibitor in the Portland Workforce Alliance's annual Northwest Youth Careers Expo every year during the active term of the contract. Follow the detailed registration instructions attached. (If Contractor is unable to participate as an exhibitor, Contractor must register to participate as a sponsor at an equivalent level.)

B. **Program Administration**

1) Contractors will report registration with PPS Partner Connect to the District prior to contract execution:
   - Contractors must submit the registration confirmation email or similar proof of registration to the District with its signed contract.

2) Contractors will receive requests from District Career Coordinators to provide Career Learning opportunities to PPS students.

3) Contractors will coordinate with the District's Career Coordinators to plan, schedule, and conduct the Career Learning events or activities.

4) Career Coordinators will coordinate student participation before and during scheduled events and activities.

Please send any questions about these Career Learning Requirements to careerpath@pps.net

PORTLAND PUBLIC SCHOOLS | CAREER AND TECHNICAL EDUCATION

PPS PARTNER CONNECT— CONNECTING PARTNERS AND PPS STUDENTS

PPS Partner Connect is our new web-based tool which makes it easy for parents, alumni and industry professionals to connect with K-12 educators. Professionals can share their skills and expertise to bring real-world, authentic learning opportunities to all our students helping to create the next generation of innovators. Through in-person matches and virtual sessions, professionals can help students and teachers connect their classroom experiences to the world of work. ***Together we can make a difference.***

Students need context for what they are learning in the classroom. *PPS Partner Connect can help match your expertise and insight to connect with the schools and students in your community. This easy-to-use tool enables educators to match student-learning needs with professionals whose skills fit their request.*

Benefits to professionals and employers:

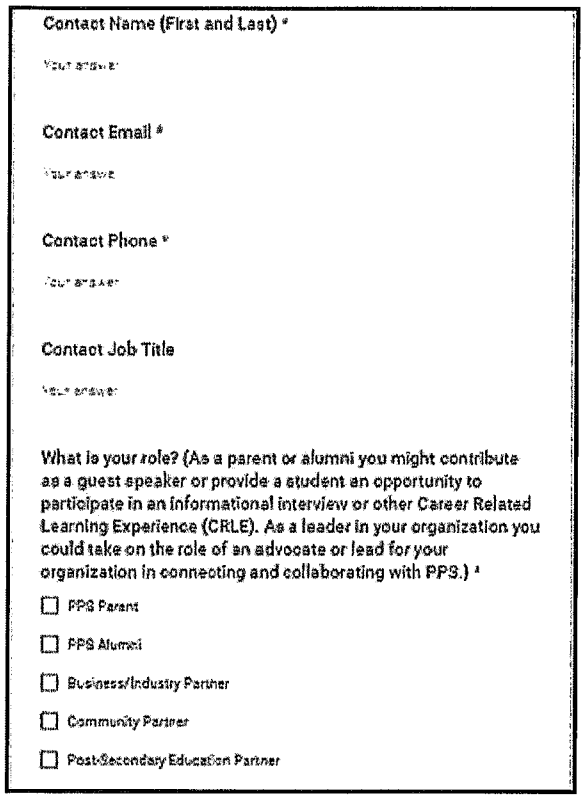
- Provides meaningful ways to engage in education
- Connects professionals with educators based on their skills, volunteer interests, and location
- Exposes future workforce to career opportunities
- Allows companies to centralize and scale education outreach
- Tracks employee engagement based on a variety of metrics and generates reports
- Enhances employee engagement and achieves corporate responsibility goals
- Demonstrates your commitment to your community through volunteering

How it works:

- Community members and professionals register and set up a profile at https://www.pps.net/partnerconnect
- Career Coordinators create a request based on a topic or activity at their school that can benefit from an industry connection.
- PPS Partner Connect enables high school Career Coordinators to match the skills of industry professional(s) with requests and helps mediate the process of connecting them to the right classroom and students.
- Career Coordinators coordinate with professionals who can choose to accept matches and connect in-person or virtually to share expertise.

ENGAGE— PREPARE — INSPIRE

The District is committed to equal opportunity and nondiscrimination in all its educational and employment activities. The District prohibits discrimination based on race; national or ethnic origin; color; sex; religion; age; sexual orientation; gender expression or identity; pregnancy; marital status; familial status; economic status or source of income; mental or physical disability or perceived disability; or military service.



Contact Name (First and Last) *

Your answer

Contact Email *

Your answer

Contact Phone *

Your answer

Contact Job Title

Your answer

What is your role? (As a parent or alumni you might contribute as a guest speaker or provide a student an opportunity to participate in an informational interview or other Career Related Learning Experience (CRLE). As a leader in your organization you could take on the role of an advocate or lead for your organization in connecting and collaborating with PPS.) *

- ☐ PPS Parent
- ☐ PPS Alumni
- ☐ Business/Industry Partner
- ☐ Community Partner
- ☐ Post-Secondary Education Partner

PPS Partner Connect Guide

STEP 1 -

1. Go to PPS Partner Connect https://www.pps.net/partnerconnect and complete the Partner Intake Survey
2. Complete your Profile Information:

a. Please provide your first and last name, the best e-mail to contact you, and best contact phone number.

b. Please select your role: (Check all that apply)

- ❖ PPS Parent - The parent of a student or students
- ❖ PPS Alumni - Those who have graduated from a PPS school.
- ❖ Business/Industry Partner - Those working in the business/industry sector including those who have a contract with PPS.
- ❖ Community Partner - Community-based pro-grams and organizations providing direct or indlrect support to our schools and students.
- ❖ Post-Secondary Education Partner - Apprentice & trade organizations, community colleges, other Higher-Ed institutions
- ❖ Volunteer - Those who wish to volunteer or are currently volunteering with PPS

STEP 1 (Cont.)

3. If you are submitting on behalf of a company or organization:
   a. Please provide your company/organization name.
   b. Please select a type that best matches your company/organization.

Company/Organization Name (Preferred information though not required if submitting as an Alumni or Parent)

Your answer

Company/Organization Type (Preferred Information though not required if submitting as an Alumni or Parent)

- ○ Business/Industry
- ○ Post-Secondary
- ○ Non-Profit
- ○ Government
- ○ Community Based Organization
- ○ Business Association
- ○ Other:

STEP 2 -

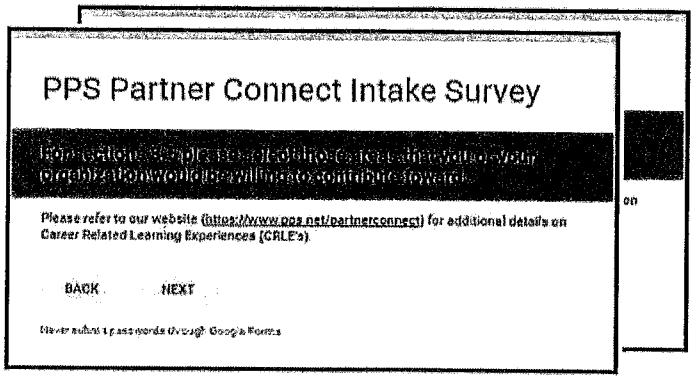
If your company is certified as a MBE, WBE, ESB, SDVBE, and/or DBE, please mark all that apply. If this does not apply, please mark N/A.

Is your company certified as a Minority Business Enterprise (MBE), a Women Business Enterprise (WBE), an Emerging Small Business (ESB), a Service-Disabled Veteran Business Enterprise (SDVBE), or a Disadvantaged Business Enterprise (DBE)? Check all that apply.

- ☐ MBE
- ☐ WBE
- ☐ ESB
- ☐ SDVBE
- ☐ DBE
- ☐ N/A (Not Applicable)

Career Related Learning Experiences are structured student activities that connect academic content and career-related learning to real life applications. In PPS we've broken them out into three tiers:

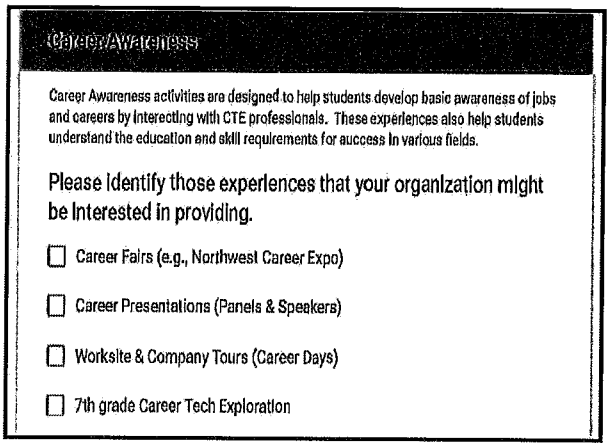
1. Career Awareness (primarily grades 7-9)
2. Career Exploration (primarily grades 9-11)
3. Career Preparedness (primarily grades 11-12)


PPS Partner Connect Intake Survey

Please refer to our website (https://www.pps.net/partnerconnect) for additional details on Career Related Learning Experiences (CRLE's).

BACK NEXT

Never submit passwords through Google Forms.


Career Awareness

Career Awareness activities are designed to help students develop basic awareness of jobs and careers by interacting with CTE professionals. These experiences also help students understand the education and skill requirements for success in various fields.

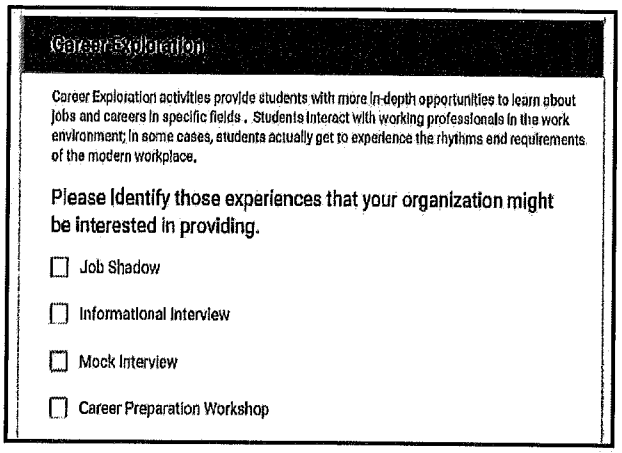
Please identify those experiences that your organization might be interested in providing.

- ☐ Career Fairs (e.g., Northwest Career Expo)
- ☐ Career Presentations (Panels & Speakers)
- ☐ Worksite & Company Tours (Career Days)
- ☐ 7th grade Career Tech Exploration

STEP 3-

Career Awareness activities are designed to help students develop basic awareness of jobs and careers by interacting with CTE professionals. These experiences also help students understand the education and skill requirements for success in various fields.

Please select the experiences that you are interested in providing.


Career Exploration

Career Exploration activities provide students with more in-depth opportunities to learn about jobs and careers in specific fields. Students interact with working professionals in the work environment; in some cases, students actually get to experience the rhythms and requirements of the modern workplace.

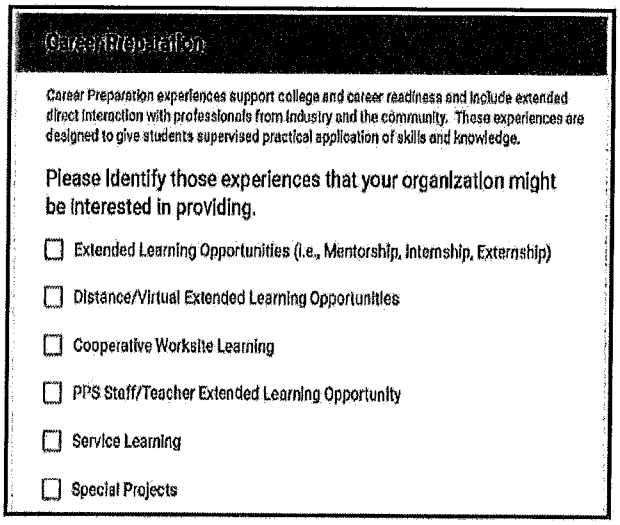
Please identify those experiences that your organization might be interested in providing.

- ☐ Job Shadow
- ☐ Informational Interview
- ☐ Mock Interview
- ☐ Career Preparation Workshop

STEP 4 -

Career Exploration activities provide students with more in-depth opportunities to learn about jobs and careers in specific fields. Students interact with working professionals in the work environment; in some cases, students actually get to experience the rhythms and requirements of the modern workplace.

Please select the experiences that you are interested in providing.


Career Preparation

Career Preparation experiences support college and career readiness and include extended direct interaction with professionals from industry and the community. These experiences are designed to give students supervised practical application of skills and knowledge.

Please identify those experiences that your organization might be interested in providing.

- ☐ Extended Learning Opportunities (i.e., Mentorship, Internship, Externship)
- ☐ Distance/Virtual Extended Learning Opportunities
- ☐ Cooperative Worksite Learning
- ☐ PPS Staff/Teacher Extended Learning Opportunity
- ☐ Service Learning
- ☐ Special Projects

STEP 5 -

Career Preparation experiences support college and career readiness and include extended direct interaction with professionals from industry and the community. These experiences are designed to give students supervised practical application of skills and knowledge.

Please select the experiences you are interested in providing.

STEP 6 -

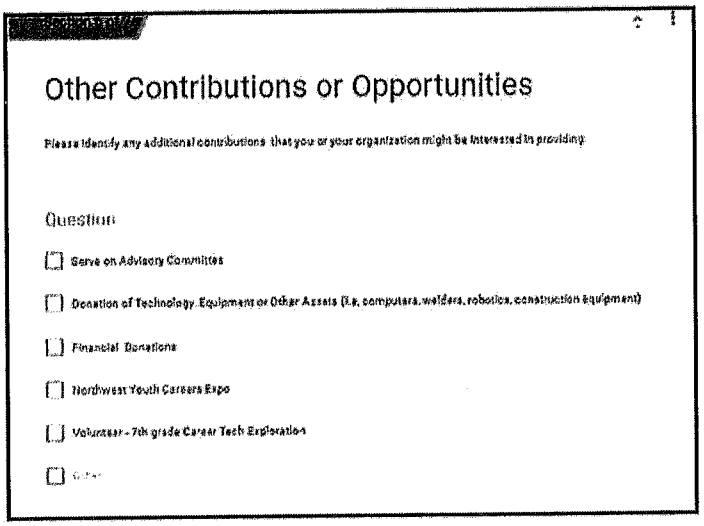
Please select the additional contributions or opportunities you would be interested in.

If you are interested in volunteering, please select "Volunteer." (e.g., guest speaker, field trips, classroom help, 7th grade Career Tech Exploration)

Examples of technology and equipment donations could include welding machines and materials, robots, construction tools, 3D printers, or possibly computers that would meet program recommendations.

PPS CTE Advisory Committees provide assistance to and promote the development of Career and Technical Education Programs to meet the needs of students, teachers, business and industry, and the community.

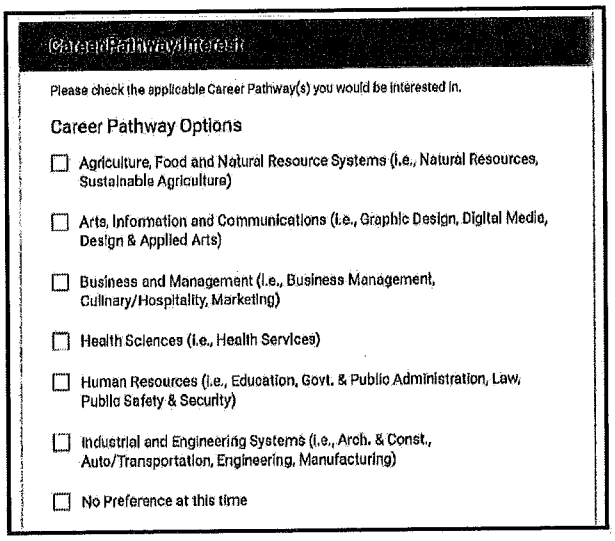
For more information on the NW Youth Careers Expo, please visit
http://www.portlandworkforcealliance.org/.


Other Contributions or Opportunities

Please identify any additional contributions that you or your organization might be interested in providing

Question

- [ ] Serve on Advisory Committee
- [ ] Donation of Technology Equipment or Other Assets (i.e. computers, welders, robotics, construction equipment)
- [ ] Financial Donations
- [ ] Northwest Youth Careers Expo
- [ ] Volunteer - 7th grade Career Tech Exploration
- [ ] Other


Career Pathway Interest

Please check the applicable Career Pathway(s) you would be interested in.

Career Pathway Options

- [ ] Agriculture, Food and Natural Resource Systems (i.e., Natural Resources, Sustainable Agriculture)
- [ ] Arts, Information and Communications (i.e., Graphic Design, Digital Media, Design & Applied Arts)
- [ ] Business and Management (i.e., Business Management, Culinary/Hospitality, Marketing)
- [ ] Health Sciences (i.e., Health Services)
- [ ] Human Resources (i.e., Education, Govt. & Public Administration, Law, Public Safety & Security)
- [ ] Industrial and Engineering Systems (i.e., Arch. & Const., Auto/Transportation, Engineering, Manufacturing)
- [ ] No Preference at this time

STEP 7 -

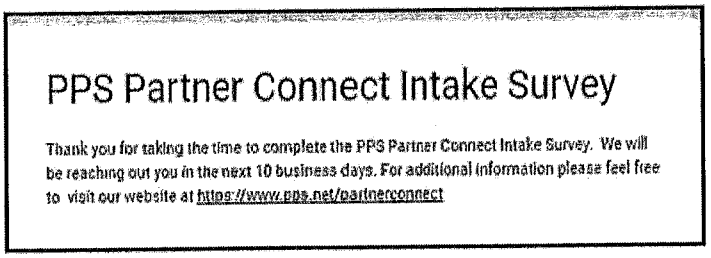
Please select the Career Pathway Options that are applicable to your interest(s). For more in-depth descriptions of the Career Pathway, please visit https://pps.net/pathways.

Final Step -

Thank you for completing our surveyl You will receive an auto reply email once you have submitted the form. If for some reason your do not receive an email, please email careerpath@pps.net and we will follow-up with you.

For additional information please visit:

https://www.pps.net/partnerconnect


PPS Partner Connect Intake Survey

Thank you for taking the time to complete the PPS Partner Connect Intake Survey. We will be reaching out you in the next 10 business days. For additional information please feel free to visit our website at https://www.pps.net/partnerconnect

NORTHWEST YOUTH CAREERS EXPO

Sponsor & Exhibitor Information

About the NW Youth Careers Expo

The annual NW Youth Careers Expo, hosted by the nonprofit Portland Workforce Alliance, is the state's largest career education experience for high school students. It shows students the region's amazing diversity of career opportunities, as well as the skills and education needed for those jobs.

The Expo's goals are to connect employers to their future workforce and help students make informed, inspired decisions about their education after high school – whether they choose a four-year university, community college or apprenticeship training center. The Expo grows every year, attracting many thousands of students and more than 100 of the region's top employers and postsecondary partners.

Expo sponsor and exhibitor opportunities

Become a sponsor: Generous sponsors make the Expo possible. Sponsors also invest in the year-round work of PWA, supporting high school students and the region's future workforce.

How your sponsorship helps: Your sponsorship helps pay for Expo costs. Our expenses include facility rental, booths, personnel and the PWA Breakfast. Our expense budget also includes significant funds to help high schools cover the costs of student transportation and substitute teachers.

Become an exhibitor: Join the region's leading businesses and organizations in telling students about career opportunities. Our exhibitors include top employers from every major sector, such as health care, business, technology, advanced manufacturing, construction, clean energy, government and the creative industries. They also include colleges and other postsecondary partners.

Registration is easy

Become a sponsor: Go to www.portlandworkforcealliance.org/expo and click on "Sponsor the Expo." Register online or use the printable form.

Become an exhibitor: Go to www.portlandworkforcealliance.org/expo and click on "Become an exhibitor." Register online or use the printable form.

Questions? Want to learn more?

PWA works with employers to offer career-learning experiences for students year-round, including career days, mentorship programs, internships, mock interviews and classroom presentations.
Visit PWA's "Contact us" page at http://www.portlandworkforcealliance.org/

Big dreams. Good jobs. All students.

ATTACHMENT I

BUILDING PORTLAND BUSINESS
SOCIAL EQUITY CONTRACTING

WORKFORCE TRAINING & HIRING PROGRAM
Contractor Checklist

This program applies to projects estimated at $200,000 or more and subcontracts of $100,000 or more

Portland Public Schools ("District") has engaged the City of Portland ("City"), Procurement Services to provide and administer the Workforce Training and Hiring Program ("Workforce Program"). The following Workforce Training & Hiring Program requirements are a summary of the key contractual obligations of contractors working on District projects. It is the Contractor's responsibility to read and fully understand this section of the bid specifications and to comply with all provisions of the program, regardless of whether they appear on this checklist. Contractors shall include in their bid all costs associated with complying with the Workforce Program.

The prime contractor and all applicable subcontractors are required to provide all workforce utilization related data electronically in LCP Tracker. The prime contractor is responsible for ensuring all subcontractors have completed all requested items.

Information related to contractor access of the system will be provided to a designated point of contact upon award of the contract. LCP Tracker is web-based and can be accessed at the following internet address: www.lcptracker.net

CHECKLIST:

For Contracts of $200,000 or More and Subcontracts of $100,000 or More, Contractors Must:

1. Submit a Workforce Plan (Exhibit 2) to City prior to submittal of first payroll report, or as otherwise designated. A copy of the Workforce Plan should be downloaded, filled out, and then uploaded into LCP Tracker. The Plan should detail your approach and strategies to achieve the targeted workforce goals established by the City.

2. Before starting work on this project, confirm registration as a Training Agent with the Bureau of Labor & Industries (BOLI), Apprenticeship & Training Division. Not a BOLI registered training agent? Contact BOLI (971-673-0760) or City of Portland (503-823-5047) for further information.

3. Ensure that a minimum of 20% of labor hours in each apprenticeable trade are worked by state registered apprentices. Contractors shall fulfill the 20% apprenticeship requirement without exceeding the apprentice ratios approved by the applicable apprenticeship program, if working in excess of 300 hours in any given trade.

4. Strive in good faith to meet the diversity goals of employing women and minorities (both journey and apprentice level workers).

5. Make all reasonable and necessary efforts to employ a workforce that reflects the diversity of the City of Portland, including recruitment of a diverse workforce through the unions, the apprenticeship programs, and other community resources, as described herein.

6. Maintain written documentation of all requests for workers from the unions, apprenticeship programs, and community organizations.

7. When an apprentice is hired: Notify the City's Contract Compliance Specialist assigned to the project.

8. Submit weekly certified payroll reports via the LCP Tracker system no later than the 5th of each month.

For additional information or questions, please contact the Contract Compliance Specialist assigned to the project or the City's Workforce Program Coordinator at 503-823-5047.

ATTACHMENT F

WORKFORCE TRAINING AND HIRING PROGRAM
Specifications

I. PURPOSE

A. General Program Description

The PPS Board of Education has specified that the District will ensure apprenticeship opportunities in the construction trades and will promote construction employment opportunities for minorities and women (ref. Equity in Purchasing and Contracting Policy 8.50.095-P). This objective includes a) ensuring that the District does business with contractors whose workforce reflects the diversity of the workforce found in the City of Portland and Multnomah County, and b) that their contracting dollars provide fair and equal opportunities to the Districts' diverse populations.

To implement this objective, the District has engaged City of Portland, Procurement Services to provide and administer the Workforce Training & Hiring Program ("Workforce Program"). The Workforce Program applies to all projects estimated at $200,000 or more and to each subcontractor having a subcontract of $100,000 or more on the project. The Contractor and all subcontractors are encouraged to fulfill the program requirements even if their contracts are less than these amounts.

Contractors shall make reasonable efforts to ensure that their workforce reflects the diversity of the City of Portland and Multnomah County.

One way contractors can make reasonable efforts to ensure that their workforce is diverse is to recruit, train, and employ minorities and women whenever possible. This portion of the Contract establishes requirements regarding that recruitment, training, and employment.

For purposes of the Workforce Program specifications, the following definitions shall apply:

"Contract" shall mean the contract awarded as a result of these bid specifications.

"Contractor" shall mean the Prime Contractor to whom a Contract is awarded, and any subcontractors with subcontracts of $100,000 or more.

"Minorities" shall include members of either sex who are African-Americans, Hispanic Americans, Asians or Pacific Islanders, Native Americans or Alaskan Native Americans.

"Owner" shall mean the government agency that awarded the Contract, or leveraged public involvement in the project through a loan or development agreement.

"Project" shall include all work performed pursuant to the Contract.

B. Organization of Program Requirements

The Workforce Program specifications are divided into several parts.

Section II - refers to the action the Prime must take in order to be eligible for award of a contract.

Section III - lists the actions that must be taken by the Prime to meet contractual obligations.

Section IV - refers to remedies available to the Owner if a Prime fails to meet the requirements of the Workforce Program specifications.

Section V - refers to the Owner's ability to monitor compliance with the Workforce Program specification by examination of Prime and subcontractor records.

ATTACHMENT F

II. ACTIONS REQUIRED PRIOR TO BEGINNING THE PROJECT

The Prime shall thoroughly read this Workforce Program specification and commit to perform all requirements described herein. The Prime shall submit, before work begins, a Workforce Plan, which demonstrates how the workforce on this project will fulfill all program requirements, including utilization of apprentices and targeted workforce goals.

III. ACTIONS REQUIRED TO SATISFY CONTRACTUAL OBLIGATIONS

A. Make Reasonable Efforts to Have Diverse Workforce

A Prime must make all necessary and reasonable efforts to have a workforce that reflects the diversity of the City of Portland and Multnomah County and is reasonably consistent with the availability of qualified women and minorities based on Equal Employment Opportunity data supplied by the City. This requirement is in addition to any other requirement of this portion of the Contract.

1. Provide written documentation of its good faith recruitment efforts. Contractors must follow the process for recruiting apprentices and journey workers described in Section III, subsection F of this specification. This process is considered by the City to be the minimum effort to recruit a diverse workforce.

2. The failure by a union with whom the Contractor has a collective bargaining agreement to refer either minorities or women shall not excuse the Contractor's obligations under this section of the specifications.

B. Ensure Compliance by Certain Subcontractors

1. The Prime shall ensure that each subcontractor having a subcontract of $100,000 or more, at any tier, shall comply with all of the provisions of the Workforce Program specifications. Contractors shall include in their price all costs associated with this requirement. No change order will be executed in order for the Prime to comply with the Workforce Program specifications.

2. The Prime shall provide a copy of this Workforce Program specification to all subcontractors with contracts of $100,000 or more executed for the project.

C. Register as a Training Agent

The Prime shall register with the Oregon Bureau of Labor and Industries (BOLI) as a Training Agent and ensure that all subcontractors who have contracts in the amount of $100,000 or more are registered as Training Agents. Registration as a Training Agent In a specific trade is not required if there are no training opportunities in that trade on the project, based on the maximum ratio allowed by BOLI.

1. Training programs approved by and registered with BOLI may be used to fulfill training requirements under the Workforce Program specifications. Other training alternatives must be approved by the City's Workforce Program Coordinator.

2. Training is intended to be primarily on-the-job training in apprenticeable crafts, and does not include classifications such as flag person, timekeeper, office engineer, estimator, bookkeeper, clerk/typist, fire fighter, or secretary. Hours performed in crafts, which are not apprenticeable occupations are exempt from the training requirements.

3. Exemptions to the training requirements must be approved by the Owner in writing prior to starting work on the project. Written requests for exemptions related to the training requirements will be considered by the Owner only for extreme circumstances during the course of the project, and must be approved in writing. All requests to exempt all or any portion of the work on a project shall be submitted to the Owner 14 calendar days before any work on the project begins. All exemptions must be approved by the Workforce Program Coordinator. *Please note: Procedures for granting exemptions are subject to change. For the most recent updates, please visit https://www.portlandoregon.gov/citycode/?c=26882&a=408189.*

D. Submit Documentation

The Prime shall submit documentation regarding the following subjects to the Owner. The Owner's failure to object to documentation submitted by the Prime or subcontractor shall not relieve them of the requirements of the Workforce Program specifications.

1. ***Training Agent Status***

   The Prime and all required subcontractors listed on the First Tier Subcontractor Disclosure Form must submit proof to the Contract Compliance Specialist that they are registered Training Agents with BOLI prior to beginning any work on the project.

2. ***Subcontractor Workforce Information***

   Each subcontractor with a contract of $100,000 or more, must submit a Workforce Plan, prior to submission of their first payroll report, or within 5 calendar days after the execution of the applicable subcontract, whichever occurs first. A copy of the Workforce Plan should be downloaded, filled out and then uploaded into LCP Tracker. Work by a subcontractor shall not begin prior to submission of such documentation.

3. ***Prime and Subcontractor Reports After Work Begins***

   Weekly Certified Payroll Reports must be submitted by the Prime and any subcontractor having a subcontract of $100,000 or more, via LCP Tracker, no later than the 5th of each month and will be used to track attainment toward the City's apprentice requirement and diversity goals. All hours subject to prevailing wage rates on public projects, in addition to supervisors, foremen and superintendents, shall be reported.

E. Use of Apprentices

The Prime shall:

1. Ensure that a minimum of 20% of labor hours in each apprenticeable trade performed on the project by the Prime, and subcontractors with subcontracts of $100,000 or more, are worked by state registered apprentices throughout the duration of the project. The Prime and subcontractors shall fulfill the 20% apprenticeship requirement without exceeding the apprentice ratios approved by the applicable apprenticeship program, if working in excess of 300 hours in any given trade.
2. Pay all apprentices the wages required by any applicable collective bargaining contract or pursuant to state or federal law and regulations.
3. Not use workers previously employed at journey-level or those who have successfully completed a training course leading to journey-level status to satisfy the requirements of these provisions.
4. Notify the Contract Compliance Specialist when an apprentice is hired for this project.
5. Count apprentice hours as follows:

   (a) Hours worked on the project by apprentices enrolled in state-approved apprenticeship programs. If the Contractor is unable to fulfill its 20% requirement, then the Contractor may also use methods (b) and (c) below;

   (b) Hours worked on the project by apprentices who are required to be away from the job site for related training during the course of the project, but only if the apprentice is rehired by the same employer after completion of training; and

   (c) Hours worked on the project by graduates of state-registered apprenticeship programs, provided that such hours are worked within the 12-month period following the apprentice's completion date.

ATTACHMENT F

F. Hiring, Requesting, Recruiting, or Replacing Workers

Contractors must follow all of these steps when hiring, requesting, recruiting or replacing workers:

For Apprentices:

1. Using the Worker Request Form, contact the appropriate apprenticeship program or dispatch center to request apprentices who are enrolled in the apprenticeship program; and

2. Request female or minority apprentices from the union or open shop apprenticeship program if such an action will help remedy historical underutilization in the Contractor's workforce.

3. If the apprenticeship program is unable to supply an apprentice and if the program is open for applications or allows direct entry from the Oregon Employment Division, make reasonable and necessary efforts to recruit apprentice applicants from WorkSource at the Oregon Employment Department, and seek to enroll them into an apprenticeship program.

   WorkSource Oregon is Oregon's largest source for job ready applicants:
   - Recruitment Services are locai, statewide, and nationwide
   - Computerized job match system matches applicants to job qualifications
   - On-the-job training resources available to offset cost of new hires
   - Go to: www.imatchskills.org or call 503-257-HIRE

For All Workers:

1. Make reasonable and necessary efforts to employ a diverse workforce. Such actions should include requests for minority and female applicants. Contractors are notified that direct hiring of employees (such as "walk-ons") without providing notification of that job opportunity may not be sufficient to establish the Contractor's efforts to satisfy the diversity goals; and

2. Document employment efforts. Use the Worker Request Form to keep a ***written*** record of requests to:
   a. Union halls for signatory contractors;
   b. Union or open shop apprenticeship programs;
   c. The Oregon Employment Department. Go to: www.imatchskills.org or call 503-257-HIRE;
   d. State-registered pre-apprenticeship programs: http://www.oregon.gov/BOLI/ATD/pages/a_ag_partners.aspx

3. Documentation will be requested by the Owner, if a Contractor is not following their Workforce Plan or meeting the workforce diversity goals, if it appears that the Contractor has not made reasonable and necessary efforts. When requested, the Contractor shall provide that documentation to the Contract Compliance Specialist within 7 calendar days.

NOTE: Contractors may contact the Contract Compliance Specialist for assistance related to any of the above issues.

IV. CONSEQUENCES OF NONCOMPLIANCE WITH WORKFORCE PROGRAM REQUIREMENTS

The Owner's commitment to this program is reflected, in part, by the cost of administering the program. Failure to meet the requirements of this section of the specifications negates such funding and impairs the Owner's efforts to promote workforce diversity and to provide fair and equal opportunities to the public as a whole as a result of the expenditure of public funds. Therefore, the parties mutually agree that failure to meet the requirements of this section of the specifications, including but not limited to the submission of required

documentation, constitutes a material breach of the Contract.

In the event of a breach of this section of the Contract, the Owner may take any or all of the following actions:

A. Withholding Progress Payments

The Owner may withhold all or part of any progress payment or payments until the Prime has remedied the breach of Contract. In the event that progress payments are withheld, the Prime shall not be entitled to interest on said payments.

If a subcontractor(s) is responsible for noncompliance with the Workforce Program requirements, the Owner may choose to withhold only their portion of the progress payment.

B. Retain Sums as Damages for Failure to Comply with Workforce Program Specifications

The parties mutually agree that it would be difficult, if not impossible, to assess the actual damage incurred by the Owner for the Prime's failure to comply with the Workforce Program specifications. The parties further agree that it is difficult, if not impossible, to determine the cost to the Owner when workforce opportunities are not provided. Therefore, if the Prime fails to comply with the Workforce Program provisions of this Contract, the Prime agrees to pay the sum of $250 per day for each day of missed apprenticeship hours or until the breach of Contract is remedied. Damages may be assessed for failure to meet the 20% apprenticeship training requirements by the Prime and each required subcontractor in each trade employed. Damages will be calculated based on the training hours not provided at a rate of $250 per day. For example, if the Contractor was required to provide 200 hours of carpenter training (20% of 1,000 total carpenter hours), and the Contractor only provided 150 training hours, then the difference (50 hours) is divided by 8 (one day of work) to determine the number of days of undelivered training. (50/8 = 6.25 x $250 = $1,562.5).

Damages may also be assessed for failure to fulfill the inclusive hiring process described in Section III, subsections F and G.

These damages are independent of any liquidated damages that may be assessed due to any delay in the project caused by the Contractor's failure to comply with the Workforce Program provisions of the Contract.

C. Retain Sums as Liquidated Damages for Delay

The Prime agrees that any delay to the specified contract time as a result of the Prime's failure to comply with the requirements of these specifications shall subject the Prime to the amount of liquidated damages specified elsewhere in the Contract.

D. Notification of Possible Debarment

By executing this Contract, the Prime agrees that it has been notified that failure to comply with the requirements of this portion of the Contract may lead to the Prime's disqualification from bidding on and receiving other Owner contracts.

E. Other Remedies

The remedies that are noted above do not limit any other remedies available to the Owner in the event that the Prime fails to meet the requirements of the Workforce Program specifications.

V. REVIEW OF RECORDS

In the event that the Owner reasonably believes that a violation of the requirements of the Workforce Program specifications has occurred, the Owner is entitled to review the books and records of the Prime and any subcontractors employed on the project to which the requirements of these specifications are applicable to determine whether such a violation has or has not occurred.

In the event that the Prime or any subcontractor fails to provide the books and records for inspection and copying when requested, such failure shall constitute a material breach of this Contract and permit the imposition of any of the remedies noted in Section IV above, including the withholding of all or part of any progress payment.

ATTACHMENT F

ATTACHMENTS:
Recommended Recruitment & Retention Practices
Apprenticeship Ratio Data

RESOURCES:
Copies of all required forms, including the Workforce Plan and Worker Request Form can be downloaded in the LCP Tracker system at www.lcptracker.net or are available on the City's website at: https://www.portlandoregon.gov/brfs/42255

For questions about the City's Workforce Training and Hiring Program requirements, visit: https://www.portlandoregon.gov/brfs/42255

For information on State-Approved Apprenticeship Programs visit the Bureau of Labor and Industries, Apprenticeship and Training Divisions website: http://www.oregon.gov/BOLI/ATD/pages/index.aspx.

For procedures related to granting exemptions to the training requirements, please visit: https://www.portlandoregon.gov/citycode/?c=26882&a=408189.

For a list of community resources to help with the recruitment of women and minorities, please visit: http://www.oregon.gov/BOLI/ATD/pages/a_ag_partners.aspx

If you have questions after reading the information contained herein and visiting the resources above, please contact Ay Saechao at (503) 823-1090, or the City's Workforce Program Manager at (503) 823-6888.

ATTACHMENT F

RECOMMENDED GOOD FAITH RECRUITMENT & RETENTION PRACTICES

A. Recruitment Efforts

Good faith recruitment efforts are those intense, aggressive, sincere, and result-oriented actions taken by the Contractor designed to accomplish the objectives of the City Workforce Training & Hiring, Good faith recruitment efforts include, but are not limited to:

1. Work aggressively with Contractor's Joint Apprenticeship Training Committee (JATC) to recruit minorities, women and disadvantaged individuals. Provide evidence of these efforts.
2. Assist the JATC by conducting a workshop with minority and women employees to enlist their assistance as recruiters and request their ideas on how to increase employment of underutilized groups.
3. Support the efforts of the Contractor's JATC by giving all apprentices referred to the Contractor a fair chance to perform successfully, allowing for possible lack of previous experience. Recognize that the Contractor is responsible for providing on-the-job training, and that all apprentices should not be expected to have previous experience.
4. Participate in job fairs, school-to-work, and community events to recruit minorities, women, and disadvantaged individuals into the construction trades.
5. Allow scheduled job site visits by participants in community programs, as safety allows, increasing awareness of job and training opportunities in the construction trades.
6. Keep applications of those not selected for an opening. Contact when opening occurs.

B. Retention Efforts

The Contractor shall endeavor to retain minorities, women, and disadvantaged individuals by implementing steps such as the following:

1. Maintain a harassment-free work place.
2. Ensure that employees are knowledgeable about the company's policies if they need to report a harassment problem.
3. Make reasonable attempts to keep apprentices working and train them in all work processes described in the apprenticeship standards.
4. Review and disseminate, at least annually, the company's EEO policy and affirmative action obligations under these specifications with all employees having any responsibility for hiring, assignment, layoff, termination or other employment decisions.
5. Conduct a review, at least annually, of all supervisors' adherence to and performance under the Contractor's EEO policies and affirmative action obligations.
6. Take steps to reduce feelings of isolation among minorities and women to curb hostile attitudes and behavior (e.g., have several minorities and women at the job site, provide access to support group system).
7. Provide adequate toilet facilities for women on the job site.
8. Match minority, female, or disadvantaged apprentices who may need support to complete their apprenticeship programs with a journey-level mentor.

ATTACHMENT F
Apprenticeship Ratio Data

*Ratios may change pursuant to actions taken by the Oregon State Apprenticeship & Training Council/BOLI. For the purposes of this contract, the ratios approved by BOLI on the date the bid is advertised shall prevail.

TRADE	APPRENTICE TO JOURNEY RATIO*		
	1st Apprentice	2nd Apprentice	Max
Asbestos/Insulation Workers	1/1	1/4	
Brick/Marble/Terrazzo/Tile Finisher	1/1	1/3	
Bricklayer/Masonry	1/1	1/3	
Carpenter (Portland)	1/1	1/1	1/1 for first three apprentices; 1/5 after
Carpet Installers/Floorlayers	1/1	1/3	
Cement Masons	1/2 (1/1 Open Shop)	1/3	
Drywall Applicator (Ext/Int Specialists)	1/1	1/1	1/1 for the first three apprentices; 1/5 thereafter
Drywall Finisher (Taper)	1/1	1/3	1/3 thereafter
Electricians			
Inside	1/1	1/3	Allowed 2 apprentices for every 3 journey
Limited Energy/Limited Residential	1/1	1/1	
Construction Lineman	1/1		Max. 2 apprentices a crew/subject to conditions
Limited Maintenance	1/1	1/2	
Stationary Engineer	1/1	1/3	
Elevator Contractor	1/1	1/3	
Environmental Control System (HVAC)	1/1	1/1	Additional apprentices at 1/3
Glass Installer (Glazier)	1/1	1/3	
Hod Carrier/Mason Tender	1/1	1/5	
Iron Worker	1/1	1/3	
Laborer (Construction)	1/1	1/5 (1/3 open shop)	1/10 Union – 10 max
Maintenance Mechanic	1/1	1/3	
Millwright	1/1		1/1 for first three apprentices, 1/5 after
Operating Engineer (Heavy)	1/1-4	2/5-9	3/10-19 4/20-24 5/25-29 30 or more 1/for each 5 additional operators
Painting & Sandblasting	1/1	1/3	
Painting (Traffic Control)	1/1	1/4	
Pile Drivers	1/1	1/1	1/1 for first three apprentices, 1/5 thereafter
Pipe Fitters	1/1	1/1	1/3 thereafter
Plasterers	1/1	1/3	
Plumber	1/1	1/1	1/1 for first two apprentices, 1/3 after
Roofer	1/1	1/1	
Scaffold Erector	1/1		1/1 for the first five apprentices; 1/5 thereafter
Sheet Metal Worker	1/1	1/1	1/1 for first two apprentices, 1/3
Sheet metal Worker (Residential)	1/1	1/3	
Sign Maker/Erector	1/1	1/1	
Sprinkler Fitter	1/1	1/1	1/1 for the first two apprentices on the job; 1/3 thereafter
Steamfitters	1/1	1/1	
Terrazzo Worker	1/1	1/3	
Tile/Marble Setter	1/1	1/3	
Truck Driver (Heavy)	1/1	1/1	

ATTACHMENT F

Exhibit 2

Workforce Plan

Instructions

1. This form must be completed by the prime and each subcontractor with a subcontract of $100,000 or more.
2. Please state how you plan to perform the work on this project, indicating the number of journey workers and apprentices, by trade.
3. This plan must demonstrate how your company will fulfill all Workforce Training & Hiring Program requirements, including utilization of apprentices, and diversity goals.

Bid #: **Project Name:**

Company Name: **Contract Amount:** $

Federal Tax ID: **Prime Contractor:** ☐ **Subcontractor:** ☐

List all Trades to be used on this Project (one trade, per line)	Total # of Journey Workers	Total # of Apprentices	Total # of Female Workers	Total # of Minority Workers	# and level of New Hires (i.e. 1A or 1J)	Anticipated Start Date	Estimated Total Hours (all workers in each trade)

Please list the apprentices who will work on this project. If you need more space, attach an additional sheet of paper. Compliance Staff must approve all apprentices on the project.

Name of Apprentice	Trade	Race	Gender	Date of Hire	STAFF USE ONLY

If no current apprentices, indicate when and how they will be hired:

Name of Workforce Plan Administrator (for Apprentice/Diversity Goals): Phone: Fax:

E-mail address?

Are you a registered Training Agent? ☐ Yes ☐ No Are you a Union or Open Shop Contractor? ☐ Union ☐ Open Shop

Which JATC dispatches apprentices to your company?

Name: Phone: Fax:
Name: Phone: Fax:

Please answer the following questions concerning your efforts to achieve the diversity goals on this project:

1. How do you plan to achieve the diversity goals on this project?

2. Other than your JATC, what resources will you use to recruit minority and female workers for this project (please check all that apply)?
   ☐ Oregon Tradeswomen ☐ ETAP ☐ Portland YouthBuilders
   ☐ Constructing Hope ☐ Job Corps ☐ Other

3. Do you need any assistance with meeting the apprenticeship requirements or diversity goals on this project?
   ☐ Yes ☐ No

Prepared By (print): **Signature:** **Date:**

Place Holder
For Exhibit J
OCIP Manual (OCIP Policy Not Issued by PPS as of August 2019)
Anticipated to be issued Spring 2021

Place Holder
For Exhibit K
OCIP Enrollment forms
(OCIP Policy Not Issued by PPS as of August 2019)
Anticipated to be issued Spring 2021

ASBESTOS MATERIALS

The following materials either tested positive or are presumed to be asbestos-containing. Materials that had mixed results are considered positive. Materials not sampled may contain asbestos and should be tested to verify asbestos content prior to impact, demolition, renovation, etc.

(+) Tested Positive, (M) Mixed Results (P) Presumed Positive

BENSON (115)

Result	Material	Location	Quantity
+	Caulk	Automotive D130; perimeter door, tan door frame caulk	C
+	Caulk	Base coat E110 tan door frame caulk	C
M	Vinyl Floor Tile	Classroom E122; 9" gray vinyl floor tile with black mastic	C
+	Gypsum Wallboard/Joint Compound	C-wing west mechanical area, gypsum and joint compound firewall	0
+	Built-up Roofing	C-wing west mechanical area, overbuilt flat tar roof section	0
+	Vinyl Floor Tile	East hall 9" gray vinyl floor tile with black mastic	0
M	Caulk	Electronics F127, gray perimeter door frame caulk	0
+	Sink Undercoating	Foundry building, staff room, black sink coating	0
+	Chalk	Foundry building; staff room, gray chalkboard	0
M	Sheet Floor Covering	Foundry building, upper custodial off-white speckled sheet floor covering	0
M	Sheet Floor Covering	Foundry; women's restroom tan sheet floor covering	0
M	Historical Materials	Historical Samples	0
M	Glued-on Ceiling Tiles	Pattern shop F102, 1" by 1" white textured ceiling tile with brown glue dots	0
+	Sink Undercoating	Prefab E109 white sink coating	0
+	Caulk	Sheet metal shop; storage, tan exterior door frame caulk	0
+	Cement Asbestos Board	Welding C145, transite welding booth panels	0

BENSON (115) BENSON - AUDITORIUM/B1 (115F)

Result	Material	Location	Quantity
P	Wall and Ceiling Plaster	Auditorium Wing (1931)	0

BENSON (115) BENSON - AUDITORIUM/ROOF (115F)

Result	Material	Location	Quantity
P	Roofing - Built up	Auditorium Wing	12000 sf

BENSON (115) BENSON - C-WING/FIRST FLOOR (115B)

Result	Material	Location	Quantity
P	Asbestos Pipe Insulation 4" - 12" OD	C Wing - Room C149	12 lf
P	Transite panels	C Wing - Room C149	270 sf
P	Mag Pipe Insulation 4" - 12" OD	Room C127	10 lf
P	Gypsum Wallboard/Joint Compound	Wing C	0

BENSON (115) BENSON - D-WING/FIRST FLOOR (115G)

Result	Material	Location	Quantity
P	Wall and Ceiling Plaster	D wing	0

BENSON (115) BENSON - E-WING/FIRST FLOOR (115D)

Result	Material	Location	Quantity
P	Wall and Ceiling Plaster	E wing	0

BENSON (115) BENSON - F-WING/FIRST FLOOR (115C)

Result	Material	Location	Quantity
P	Hard Fittings/Fiberglass 4" - 6" OD	F Wing - First Floor Pattern Storage	3 ea
P	Hard Fittings/Fiberglass 4" - 6" OD	F Wing - Room F102	5 ea
P	Hard Fittings/Fiberglass 4" - 6" OD	F Wing - Room F116	3 ea

BENSON (115) BENSON - KBPS/FIRST FLOOR (115K)

Result	Material	Location	Quantity
P	Wall and Ceiling Plaster	KBPS	0

BENSON (115) BENSON - LIBRARY ADDITION/FIRST FLOOR (115J)

Result	Material	Location	Quantity
P	Wall and Ceiling Plaster	1953 Library Science Addition	0

BENSON (115) BENSON - MAIN/ATTIC (115A)

Result	Material	Location	Quantity
P	Asbestos Pipe Insulation 4" - 12" OD	Attic Shop Wings C & E	1007 lf
P	Hard Fittings/Fiberglass 4" - 6" OD	Central Building Attic - Above G20' - G2C2	2 ea
P	Mag Pipe Insulation 4" - 12" OD	Central Building Attic - Above G201 - G2C2	55 lf
P	Mag Pipe Insulation 4" - 12" OD	Central Building Attic - West Fan Room	50 lf

BENSON (115) BENSON - MAIN/B1 (115A)

Result	Material	Location	Quantity
P	Asbestos Pipe Insulation 4" - 12" OD	Basement Custodian Storage 2	102 lf
P	Mag and cardboard Pipe Insulation	Boiler Room	1591 lf
P	Boiler Insulation - Two Boilers	Boiler Room	760 sf
P	Tank Insulation - Three Tanks	Boiler Room	357 sf
P	Mag Pipe Insulation 4" - 12" OD	Cafeteria Fan Room	160 lf
P	Mag Pipe Insulation 4" - 12" OD	Cafeteria tunnels	1770 lf
P	Asbestos Pipe Insulation 4" - 12" OD	Centra Building - Basement - Walls and Ceiling Above Cafeteria	1030 lf
P	Asbestos Pipe Insulation 4" - 12" OD	Central Building - Tunnel Under Orginal Building	1020 lf
P	Asbestos Pipe Insulation 4" - 12" OD	Central Building - Tunnels To Boys Gym	120 lf
P	Asbestos Pipe Insulation 4" - 12" OD	Central Building - Tunnels To Gym	200 lf
+	VAT of various colors 9" x 9"	Central Building Basement	5000 sf
P	Asbestos Pipe Insulation 4" - 12" OD	Custodian Storage 1 - Breakroom	310 lf
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym - Wing Basement - NW Stairwell	2 ea
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym Wing - Basement - South Hall G8	5 ea
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym Wing - Basement - Team Room G27A	3 ea
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym Wing - Basement - Team Room G31C	2 ea
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym Wing - Basement - Under NE Stair Landing	2 ea
P	Mag Pipe Insulation 4" - 12" OD	Gym Wing - Basement Mechanical Room	190 lf
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym Wing - Drying Room G23	10 ea

BENSON (115) BENSON - MAIN/B1 (115A)

Result	Material	Location	Quantity
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym Wing - Drying Room G30	11 ea
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym Wing - Drying Room G32	12 ea
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym Wing - Drying Room G34	12 ea
P	Asbestos Pipe Insulation 4" - 12" OD	Gym Wing - Girls Locker Room	5 lf
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym Wing - Girls Locker Room	15 ea
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym Wing - Team Room G33D	3 ea
P	Expansion tank insulation	Gym Wing Boys Locker Room - Fan Room	18 sf
P	Converter Insulation	Gym Wing Boys Locker Room - Fan Room	16 sf
P	Asbestos Pipe Insulation 4" - 12" OD	Main Tunnel From Boiler	1550 lf

BENSON (115) BENSON - MAIN/FIRST FLOOR (115A)

Result	Material	Location	Quantity
P	Fire Doors	Auto Shop Building - First Floor	15 sf
P	Cardboard pipe insulation 4" OD	Auto Shop Building - First Floor Corridor Belwween D121 - D112	8 lf
P	Mag Pipe Insulation 4" - 12" OD	Auto Shop Building - Room D107	164 lf
P	Mag Pipe Insulation 4" - 12" OD	Auto Shop Building - Room D112	296 lf
P	Mag Pipe Insulation 4" - 12" OD	Auto Shop Building - Room D121	280 lf
P	Mag Pipe Insulation 4" - 12" OD	Auto Shop Building - Room D140	38 lf
P	Air Cell Pipe Insulation 4" OD	Auto Shop Building - Room D143	19 lf
P	Mag and cardboard Pipe Insulation 4" OD	Auto Shop Building Room D103 (storage)	36 lf
P	Vinyl Floor Tile of various colors 9"x9"	Central Building - First Floor	12775 sf
P	Air Cell Pipe Insulation 4" OD	Main Building - Above/Behind Walls and Ceilings in Science Rooms	1000 lf
P	Mag and aircell Pipe Insulation	Main Building - Fan Room 110	410 lf
P	Duct Insulation	Main Building - Fan Room 110	400 sf
P	Hard Fittings/Fiberglass 4" - 6" OD	Main Building - First Floor East Corridor (near stock room)	7 ea
P	Hard Fittings/Fiberglass 4" - 6" OD	Main Building - Room 127A	3 ea
P	Mag Pipe Insulation 4" - 12" OD	Main Building - Storage Room 126	260 lf
P	Mag Pipe Insulation 4" - 12" OD	Room D130	112 lf
P	Cardboard pipe insulation 4" OD	Room D148	22 lf

BENSON (115) BENSON - MAIN/ROOF (115A)

Result	Material	Location	Quantity
P	Mag Pipe Insulation 4" - 12" OD	Central Building - Boys Gym Penthouse	315 lf
P	Asbestos Pipe Insulation 4" - 12" OD	Central Building - Penthouse E	200 lf
P	Duct tape	Central Building - Penthouse E	5 sf

BENSON (115) BENSON - MAIN/SECOND FLOOR (115A)

Result	Material	Location	Quantity
P	Mag Pipe Insulation 4" - 12" OD	Auto Shop Building - Room D201	70 lf
P	Mag Pipe Insulation 4" - 12" OD	Auto Shop Building - Room D202	60 lf
P	Fire Doors	Auto Shop Building - Second Floor	10 sf
P	Mag Pipe Insulation 4" - 12" OD	Auto Shop Building - Storage Room (across from D208)	25 lf
P	Vinyl Sheet Flooring	Central Building - Second Floor	150 sf
+	VAT of various colors 9" x 9"	Central Building - Second Floor	5000 sf
P	Transite tile	Central Building - Second Floor - NE Stairwell Ceiling	360 sf
P	Mag Pipe Insulation 4" - 12" OD	Main Building - Fan Room (near room 205)	45 lf
P	Mag Pipe Insulation 4" - 12" OD	Room D205	130 lf

BENSON (115) BENSON - NEW GYM/ROOF (115H)

Result	Material	Location	Quantity
P	Mag. air cell and cardboard pipe insulation 2" - 10" OD	1948 addition - North wing Attic	135 lf
P	Mag. air cell and cardboard pipe insulation 2" - 10" OD	1948 addition - South wing Attic	135 lf

BENSON (115) BENSON - OLD GYM/FIRST FLOOR (115E)

Result	Material	Location	Quantity
P	Wall and Ceiling Plaster	1925 Old Gym (west)	0
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym Wing - Boys G100	14 ea
P	Mag Pipe Insulation 4" - 12" OD	Gym Wing - Girls G105	6 lf
P	Hard Fittings/Fiberglass 4" - 6" OD	Gym Wing - Old Gym SW Storage	5 ea

MATERIALS THAT TESTED NEGATIVE

The following materials tested negative. Although no asbestos was detected, it is possible that further sampling could indicate asbestos content. It may be prudent to test prior to impact, demolition, renovation, etc.

BENSON (115)

Material	Location
Joint Compound	Automotive D130; black concrete expansion joint material
Gypsum Wallboard	Automotive D130; gypsum ceiling board
Ceramic Tile/Grout	Automotive D130; lavatory, tan ceramic tile and grout
Glued-on Ceiling Tiles	Automotive D130; office 1' by 1' white even-hole pattern ceiling tile with brown mastic
Joint Compound	Aviation 115 black concrete expansion joint material
CMU	Aviation D115 cement block and mortar
Brick	Aviation D115 storage, welding table fire brick
Mechanical Isolation Cloth	Body shop D140, black furnace mechanical isolation cloth
Duct Fell Tape	Body shop D140, hall, duct-tape yellow/gray fiberglass
Gypsum Wallboard	Body shop D140, mech area gypsum ceiling board
Lay-in Ceiling Tile	Body shop; upper storage 2' by 4' gypsum lay-in ceiling tile
Mechanical Isolation Cloth	Cafetena upper storagu, white woven mechanical isolation cloth
Brick	Classroom C145; red brick and mortar
Mastic	Classroom C145; yellow carpet mastic
Corkboard	Classroom D202; corkboard and brown mastic
Concealed Grid Ceiling Tile	Classroom D207; 1' by 1' white even hole pattern concealed grid ceiling tile
Covebase/Mastic	Classroom D207, 4" black covebase with brown mastic
Gypsum Wallboard	Classroom D207; wall, gypsum ceiling board
Gypsum Wallboard/Joint Compound	Classroom D206; gypsum and joint compound
Window	Classroom D206, tan Black interior window frame insert
Covebase/Mastic	Classroom E126; 4" black covebase with yellow and brown mastic
Caulk	Classroom E126; tan rubbery door frame caulk
Covebase/Mastic	Classroom F107, 4" black covebase with yellow mastic
Mastic	Classroom F113, yellow carpet mastic
Lay-in Ceiling Tile	Computer room 2' by 4' white lay-in ceiling tile
Covebase/Mastic	Computer room 4" black covebase with brown mastic

BENSON (115)

Material	Location
Gypsum and Plaster	Computer room: gypsum and plaster
Covebase/Mastic	C-wing hall: 4" black covebase with brown mastic
Mechanical Isolation Cloth	C-wing, west mechanical area: gray mechanical isolation cloth
Roofing Felt	C-wing; west mechanical area: overburden roof shingle and paper
Roofing Felt	C-wing, west mechanical area, overburden roof shingle and paper
Glued-on Ceiling Tiles	Diesel D101, office, 1' by 1' white ceiling tile with brown mastic
Vinyl Floor Tile	Drafting F201; 12" off-white vinyl floor tile with yellow mastic
Mechanical Isolation Cloth	East half, attic mechanical, gray cloth mechanical isolation cloth
Vinyl Floor Tile	Electronics E123; 12" tan vinyl floor tile with black mastic
Gypsum Wallboard/Joint Compound	Electronics E123; gypsum and joint compound ceiling above grid
Vinyl Floor Tile	Electronics E123, hall: 12" gray grid pattern vinyl floor tile with yellow mastic
Lay-in Ceiling Tile	Electronics E123; hall, 2' by 4' white cellulose lay-in ceiling tile
Covubase/Mastic	Electronics E123, hall, 4" gray covebase with yellow and brown mastic
Sink Undercoating	Electronics E123, hall, black sink coating
Vinyl Floor Tile	Electronics E127; 12" orange/white vinyl floor tile and black mastic
CMU	Electronics E127; CMU block and mortar
Tectum	Electronics E127, tectum ceiling tiles
Covebase/Mastic	Electronics E131, 4" brown covebase with brown mastic
Gypsum Wallboard/Joint Compound	Foundry building: gypsum and joint compound
Sheet Floor Covering	Foundry building: off-white speckled sheet floor covering
Sprayed Fibrous Fireproofing	Foundry building: south stairwell fluffy stair fireproofing
Sheet Floor Covering	Foundry building: stairwell, north, black stair tread with brown mastic

BENSON (115)

Material	Location
Sprayed Fibrous Fireproofing	Foundry building stairwell, north, fluffy stairl reproofing
Mastic	Foundry building upper hall, gray carpet square mastic
Hard Fittings/Fiberglass	Foundry building upper men's restroom, hard fitting on fiberglass insulation
Gypsum Wallboard/Joint Compound	Foundry ceramics office, gypsum and joint compound
Lay-in Ceiling Tile	Foundry ceramics 2' by 4' white fiberglass lay-in ceiling tile
Duct Fell Tape	Foundry ceramics thin white duct tape
Concealed Grid Ceiling Tile	Foundry F116; 1' by 1' off-white textured concealed grid ceiling tile
Covebase/Mastic	Foundry F116; 4' black covebase with brown mastic
Brick	Foundry F116; brick and mortar wall
Duct Fell Tape	Foundry F116, foundry exhaust AHU duct tape
Panel	Foundry F116, plaster window frame panel
CMU	Foundry storage room; cement block and mortar
Duct Fell Tape	Foundry; lockers hall thin white duct tape
Vinyl Floor Tile	Foundry, men's restroom, 12" off-white vinyl floor tile with black mastic
Gypsum Wallboard/Joint Compound	KPBS classroom 25 gypsum and joint compound
Mastic	KPBS classroom 26 orange wall panel mastic
Sink Undercoating	KPBS conference, black sink coating
Mortar	KPBS conference, white glass block mortar
Sheet Floor Covering	KPBS custodial room; gray sheet vinyl
Sheet Floor Covering	KPBS electrical room; gray jute-back sheet floor covering and white mastic on concrete
Sheet Floor Covering	KPBS men's restroom gray speckled sheet floor covering
Mastic	KPBS men's restroom tape and wainscot mastic
Mastic	KPBS production 17' waste and wallboard with fiberglass ceiling panels
Leveling Compound	KPBS reception, white leveling compound
Lay-in Ceiling Tile	KPBS records library; 2' by 4' white lay-in ceiling tile
Lay-in Ceiling Tile	KPBS southwest hall; 2' by 2' white grid-pattern lay-in ceiling tile

BENSON (115)

Material	Location
Duct Felt Tape	KPBS southwest hall white thin duct tape
Mastic	KPBS southwest hall yellow carpet mastic
Covebase/Mastic	KPBS sprinkler room; 4" blue covebase with yellow mastic
Gypsum Wallboard/Joint Compound	KPBS sprinkler room, gypsum and joint compound
Covebase/Mastic	KPBS stairwell; 4" tan covebase with white mastic
Gypsum Wallboard/Joint Compound	KPBS upper storage gypsum and joint compound
Duct Felt Tape	KPBS upper storage, white thin duct tape
Mastic	KPBS upper storage, yellow carpet mastic
Ceramic Tile/Grout	Men's E142; brown ceramic floor tile and grout
Ceramic Tile/Grout	Men's E142; pink ceramic wall tile and grout
Wall and Ceiling Plaster	Office E129, plaster walls
Duct Felt Tape	Pattern shop E102 thin exhaust system duct tape
Wall and Ceiling Plaster	Photo E109; dark room, plaster wall
Gypsum Wallboard/Joint Compound	Painting E105; gypsum and joint compound
Gypsum Wallboard/Joint Compound	Sheet metal shop; storage gypsum and joint compound
Vinyl Floor Tile	Storage E124, 12" white vinyl floor tile with orange mastic
Vinyl Floor Tile	Storage E124; rear annex, 12" gray grid pattern vinyl floor tile with black mastic
Gypsum Wallboard/Joint Compound	Storage E124 rear annex, gypsum and joint compound storage room construction
Covebase/Mastic	Tech C102, black 4" covebase with yellow mastic
Gypsum Wallboard/Joint Compound	Tech C102, newer office gypsum and joint compound
Wall and Ceiling Plaster	Tech C122, plaster soffits
Ceramic Tile/Grout	Welding C145 bathroom pink ceramic wall tile and grout
Caulk	Welding C145 black interior window sealant
CMU	Welding C145 storage cement masonry unit block and mortar
Brick	Welding C145 tan welding station brick blocks
Tectum	Welding C145 tectum ceiling tile

BENSON (115) BENSON - F-WING/FIRST FLOOR (115C)

Material	Location
Spray Ceiling Insulation	Central Building / First Floor / F Wing / Stairwell

BENSON (115) BENSON - LIBRARY ADDITION/FIRST FLOOR (115J)

Material	Location
Spray on	Central Building / First Floor / Library Addition

BENSON (115) BENSON - MAIN/B1 (115A)

Material	Location
Wall & Ceiling Plaster	Central Building / Basement / Walls and Ceiling
Ceiling Tile	Central Building / Basement / Walls and Ceiling
Glue-on Ceiling Tiles- Ceiling Tiles and Mastic	Central Building / Basement / Walls and Ceiling / Above Cafeteria

BENSON (115) BENSON - MAIN/FIRST FLOOR (115A)

Material	Location
Sprayed Fibrous Fireproofing	Central Building / First Floor / H Wing / Corridor
Gypsum and Ceiling plaster	Central Building / First Floor / H Wing / Walls and Ceilings
Gypsum Wall board	Central Building / First Floor / H Wing / Walls and Ceilings
Wall & Ceiling Plaster	Central Building / First Floor / Walls and Ceiling
Ceiling Tile	Central Building / First Floor / Walls and Ceiling
Wall and Ceiling Plaster	Original 1916 Construction (admin, Library, C wing)

BENSON (115) BENSON - MAIN/SECOND FLOOR (115A)

Material	Location
Gypsum Wallboard/Joint Compound-Wallboard and clear adhesive	Central Building / Attic / Shop Wings C & E
Wall & Ceiling Plaster	Central Building / Second Floor / A Wing / Walls and Ceiling
Subfloor sound insulation	Central Building / Second Floor / Main Building / Subfloor
Ceiling Tile	Central Building / Second Floor / Walls and Ceiling
Wall & Ceiling Plaster	Central Building / Second Floor / Walls and Ceiling

BENSON (115) BENSON - NEW GYM/FIRST FLOOR (115H)

Material	Location
Wall and Ceiling Plaster	1964 New Gym (east)

ASBESTOS SUMMARY

April 1996 to April 1996 - PBS bulk samples
Activity: O & M - Location: Roof

roof debris

April 1996 to April 1996 - Z4
Activity: O & M - Location: Roof - BENSON

roof debris

August 1996 to August 1996 - PBS bulk samples
Activity: O & M - Location: Boiler room, Machine Shop

unspecified material

November 1996 to November 1996 - H
Activity: O & M - Location: Rooms 107, 109, 201, 204, 209, 210, 214, 217

plaster, floor tile and mastic

November 1996 to November 1996 - 19
Activity: O & M - Location: Rooms 107, 109, 201, 204, 209, 210, 214, 217 - BENSON

plaster, floor tile and mastic

October 1997 to October 1997 - H
Activity: O & M - Location: Athletics Room

tile and mastic

July 1998 to July 1998 - Z5
Activity: O & M - Location: Roof area by Boiler room - BENSON

roofing insulation

July 1998 to July 1998 - H
Activity: O & M - Location: Roof area by Boiler room

roofing insulation

March 1999 to March 1999 - H
Activity: O & M - Location: Tech net room above ceiling

Paperboard and sheetrock

March 1999 to March 1999 - 17
Activity: O & M - Location: Tech net room above ceiling - BENSON

fiberboard and sheetrock

December 2000 to December 2000 - 01
Activity: O & M - Location: Boiler Room - BENSON

Glove bags 3 on boiler # 3

December 2000 to December 2000 - N
Activity: O & M - Location: Boiler Room

Glove bags 3 on boiler # 3

December 2000 to December 2000 - N
Activity: O & M - Location: Boiler Room

Removed ACM from around access door boiler #1

December 2000 to December 2000 - N
Activity: O & M - Location: Boiler Room

Glove bags at Boiler #2

June 2002 to June 2002 - PBS 6821.010
Activity: O & M - Location: C-Wing

Remove approx. 140 linear feet of pipe insulation from multiple wash basins

June 2002 to June 2002 - PBS 6821.010
Activity: O & M - Location: C-wing

Remove approx. 710 linear feet pipe insulation from multiple areas

June 2002 to June 2002 - PBS 6821.010
Activity: O & M - Location: Boiler room entrance

Remove approx. 90 linear feet of pipe insulation

June 2002 to June 2002 - 21
Activity: O & M - Location: C-Wing - BENSON

Remove approx. 140 linear feet of pipe insulation from multiple wash basins

March 2004 to March 2004 - 09
Activity: O & M - Location: Room D145 - BENSON

Repair damagod asbestos pipe insulation in the auto paint shop - overhead pipes damaged

March 2004 to March 2004 - H
Activity: O & M - Location: Room D145

Repair damaged asbestos pipe insulation in the auto paint shop - overhead pipes damaged

June 2004 to June 2004 - 6823.016
Activity: O & M - Location: Boiler room

Removal and disposal of asbestos-containing pipe insulation and mag block insulation

June 2004 to June 2004 - 20
Activity: O & M - Location: Boiler room - BENSON

Removal and disposal of asbestos-containing pipe insulation and mag block insulation

July 2008 to July 2008 - 30
Activity: Renovation/Repair/Painting - Location: Classroom C102 - BENSON

Removal and disposal of 4 LF of asbestos-containing pipe insulation

July 2008 to July 2008 - PBS Pr#6827.014
Activity: Renovation/Repair/Painting - Location: Classroom C102

Removal and disposal of 4 LF of asbestos-containing pipe insulation

December 2008 to December 2008 - PBS #6500.273
Activity: Renovation/Repair/Painting - Location: Restroom across from Classroom F210

Removal and disposal of 156 SF of asbestos-containing sheet vinyl flooring

December 2008 to December 2008 - 29
Activity: Renovation/Repair/Painting - Location: Restroom across from Classroom F210 - BENSON

Removal and disposal of 156 SF of asbestos-containing sheet vinyl flooring

August 2009 to August 2009 - 8
Activity: O & M - Location: various locations - BENSON

Friable <1 SF

August 2009 to August 2009 - H
Activity: O & M - Location: various locations

Friable <1 SF

May 2010 to May 2010 - PBS 6500.333
Activity: O & M - Location: Boiler room

removal of approx. 21 sq feet of boiler insulation.

May 2010 to May 2010 - 07
Activity: O & M - Location: Boiler room - BENSON

removal of approx. 21 sq feet of boiler insulation.

January 2013 to January 2013 - H
Activity: O & M - Location: Room 204 ceiling

92

October 2013 to October 2013 - H
Activity: O & M - Location: Mechanical room

na

March 2014 to March 2014 - H
Activity: O & M - Location: Boiler room

na

March 2014 to March 2014 - 28
Activity: Renovation/Repair/Painting - Location: Attic fan room above room E-131 - BENSON

Patch and Repair

March 2014 to March 2014 - PBS# 6000.537
Activity: Renovation/Repair/Painting - Location: Attic fan room above room E-131

Patch and Repair

April 2014 to April 2014 -
Activity: Clearance - Location: New gym - BENSON

New gym

April 2014 to April 2014 - H
Activity: Clearance - Location: New gym

na

December 2014 to December 2014 - H
Activity: O & M - Location: room 127

2 LF removal of TSI to access and repair steam leak

December 2014 to December 2014 - 14
Activity: O & M - Location: room 127 - BENSON

2 LF removal of TSI to access and repair steam leak

April 2015 to April 2015 - 06
Activity: O & M - Location: Gym stairwell - BENSON

poured flooring and covebase

April 2015 to April 2015 - H
Activity: O & M - Location: Gym stairwell

poured flooring and covebase

May 2015 to May 2015 - H
Activity: O & M - Location: Boys Gym, Penthouse

mag pipe insulation and asbestos pipe insulation

May 2015 to May 2016 - 18
Activity: O & M - Location: Boys Gym Penthouse - BENSON

mag pipe insulation and asbestos pipe insulation

December 2015 to December 2015 - 6500.632
Activity: O & M - Location: Health Clinic - BENSON

Benson HS Asbestos Abatement Closeout

December 2015 to December 2015 - PBS 6500.632
Activity: O & M - Location: Health Clinic

Benson HS Asbestos Abatement Closeout

December 2015 to April 2016 - 15
Activity: O & M - Location: Health Clinic - BENSON

Asbestos abatement and disposal

December 2015 to April 2016 - H
Activity: O & M - Location: Health Clinic

Asbestos abatement and disposal

February 2016 to February 2016 - H
Activity: O & M - Location: by Room 141

hard fitting on fiberglass line

February 2016 to February 2016 - H
Activity: O & M - Location: by Room 141

hard fitting on fiberglass line

February 2016 to February 2016 - 02
Activity: O & M - Location: by Room 141 - BENSON

hard fitting on fiberglass line

February 2016 to February 2016 - 03
Activity: O & M - Location: by Room 141 - BENSON

hard fitting on fiberglass line

May 2016 to May 2016 - H
Activity: O & M - Location: various locations

hard fittings mag pipe insulation

June 2016 to June 2016 - H
Activity: O & M - Location: G-20

roof duct insulation

June 2016 to June 2016 - H
Activity: O & M - Location: Roof al area of G20'

roofing insulation

July 2016 to July 2016 - 16
Activity: O & M - Location: Boiler Room - BENSON

boiler room insulation

July 2016 to July 2016 - H
Activity: O & M - Location: Boiler Room

boiler room insulation

August 2016 to August 2016 - H
Activity: O & M - Location: Boiler room

boiler room dust

August 2016 to August 2016 - H
Activity: O & M - Location: Boiler

na

October 2016 to October 2016 - H
Activity: O & M - Location: BENSON

TSI - Boiler

October 2016 to October 2016 - 12
Activity: O & M - Location: BENSON

TSI - Boiler

December 2016 to December 2016 - H
Activity: O & M - Location: Room 214

wall build out plaster board

January 2017 to January 2017 - H
Activity: O & M - Location: various locations throughout the school

mag and cibe insulation, hard fittings, breeching, tank and boiler insulation, VAT/mastic fire door, wall and ceiling plaster, transite board, joint compound

May 2018 to May 2018 - H
Activity: Database Update - Location: BENSON 2018 Asbestos Sample Migration

Import Historical Bulk Samples for BENSON from PBS Engineering and Environmental Website

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - C-WING/FIRST FLOOR Materials

Import Historical Materials for BENSON - C-WING/FIRST FLOOR from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - MAIN/ATTIC Materials

Import Historical Materials for BENSON - MAIN/ATTIC from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - MAIN/B1 Materials

Import Historical Materials for BENSON - MAIN/B1 from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - MAIN/FIRST FLOOR Materials

Import Historical Materials for BENSON - MAIN/FIRST FLOOR from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - F-WING/FIRST FLOOR Materials

Import Historical Materials for BENSON - F-WING/FIRST FLOOR from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - OLD GYM/FIRST FLOOR Materials

Import Historical Materials for BENSON - OLD GYM/FIRST FLOOR from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - AUDITORIUM/ROOF Materials

Import Historical Materials for BENSON - AUDITORIUM/ROOF from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - MAIN/ROOF Materials

Import Historical Materials for BENSON - MAIN/ROOF from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - MAIN/SECOND FLOOR Materials

Import Historical Materials for BENSON - MAIN/SECOND FLOOR from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - AUDITORIUM/B1 Materials

Import Historical Materials for BENSON - AUDITORIUM/B1 from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - LIBRARY ADDITION/FIRST FLOOR Materials

Import Historical Materials for BENSON - LIBRARY ADDITION/FIRST FLOOR from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - E-WING/FIRST FLOOR Materials

Import Historical Materials for BENSON - E-WING/FIRST FLOOR from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - KBPS/FIRST FLOOR Materials

Import Historical Materials for BENSON - KBPS/FIRST FLOOR from PBS Engineering and Environmental

May 2018 to May 2018 - H
Activity: Database Update - Location: Import BENSON - D-WING/FIRST FLOOR Materials

Import Historical Materials for BENSON - D-WING/FIRST FLOOR from PBS Engineering and Environmental

June 2018 to June 2018 - H
Activity: Database Update - Location: BENSON - NEW GYM/FIRST FLOOR 2018 Asbestos Migration

Import Historical Materials for BENSON - NEW GYM/FIRST FLOOR from PBS Engineering and Environmental

October 2018 to October 2018 - 2018-115
Activity: AHERA 3 Year Re-Inspection - Location: Benson

An Asbestos Hazard Emergency Response Act (AHERA) 3-year reinspection at this school/site

In accordance with federal regulations (40 CFR 763) an AHERA certified inspector inspected all accessible asbestos containing materials as detailed in the Asbestos Containing Materials Report.

January 2019 to February 2019 - 25000.112 Phase 0001
Activity: Inspection/Survey - Location: Throughout

ACTIVITIES

The following shows historic activities and projects. The information presented is limited to the information currently in the database.

For more detailed information or related documents see the individual asbestos activity in the database.

Activity Type	Location	Start Date	Related Documents
Inspection/Survey	Throughout	01/15/2019	Yes
AHERA 3 Year Re-Inspection	Benson	10/09/2018	No
Database Update	BENSON - NEW GYM/FIRST FLOOR 2018 Asbestos Migration	06/25/2018	No
Database Update	Benson	05/31/2018	No
Database Update	Import BENSON - C-WING/FIRST FLOOR Materials	05/23/2018	No
Database Update	Import BENSON - MAIN/ATTIC Materials	05/23/2018	No
Database Update	Import BENSON - MAIN/B1 Materials	05/23/2018	No
Database Update	Import BENSON - MAIN/FIRST FLOOR Materials	05/23/2018	No
Database Update	Import BENSON - F-WING/FIRST FLOOR Materials	05/23/2018	No

Activity Type	Location	Start Date	Related Documents
Database Update	Import BENSON - OLD GYM/FIRST FLOOR Materials	05/23/2018	No
Database Update	Import BENSON - AUDITORIUM/ROOF Materials	05/23/2018	No
Database Update	Import BENSON - MAIN/ROOF Materials	05/23/2018	No
Database Update	Import BENSON - MAIN/SECOND FLOOR Materials	05/23/2018	No
Database Update	Import BENSON - AUDITORIUM/B1 Materials	05/23/2018	No
Database Update	Import BENSON - LIBRARY ADDITION/FIRST FLOOR Materials	05/23/2018	No
Database Update	Import BENSON - E-WING/FIRST FLOOR Materials	05/23/2018	No
Database Update	Import BENSON - KBPS/FIRST FLOOR Materials	05/23/2018	No
Database Update	Import BENSON - D-WING/FIRST FLOOR Materials	05/23/2018	No
Database Update	BENSON 2018 Asbestos Sample Migration	05/17/2018	No
Periodic Surveillance	various locations throughout the school - Benson	01/31/2017	Yes
O & M	various locations throughout the school	01/31/2017	No
O & M	Room 214	12/22/2016	No
O & M	Room 214 - Benson	12/22/2016	Yes
O & M	BENSON	10/03/2016	Yes
O & M	BENSON	10/03/2016	No
O & M	Boiler	08/17/2016	No
O & M	Boiler room	08/09/2016	No
O & M	Boiler room - BENSON	08/09/2016	Yes
O & M	Boiler Room - BENSON	07/14/2016	Yes
O & M	Boiler Room	07/14/2016	No
O & M	Roof at area of G201	06/16/2016	No
O & M	Roof at area of G201 - BENSON	06/16/2016	Yes
O & M	G-201	06/15/2016	Yes
O & M	G-201	06/15/2016	No
O & M	various locations	05/10/2016	No
Periodic Surveillance	various locations - BENSON	05/10/2016	Yes
O & M	by Room 141	02/03/2016	No
O & M	by Room 141	02/03/2016	No
O & M	by Room 141 - BENSON	02/03/2016	Yes

Activity Type	Location	Start Date	Related Documents
O & M	by Room 141 - BENSON	02/03/2016	Yes
O & M	Health Clinic - BENSON	12/29/2015	Yes
O & M	Health Clinic	12/29/2015	No
O & M	Health Clinic	12/28/2015	No
O & M	Health Clinic - BENSON	12/28/2015	Yes
AHERA 3 Year Re-Inspection	Benson High School	07/01/2015	Yes
O & M	Boys Gym Penthouse - BENSON	05/06/2015	Yes
O & M	Boys Gym Penthouse	05/06/2015	No
O & M	Gym stairwell	04/13/2015	No
O & M	Gym stairwell - BENSON	04/13/2015	Yes
O & M	room 127	12/05/2014	No
O & M	room 127 - BENSON	12/05/2014	Yes
Clearance	New gym - BENSON	04/17/2014	Yes
Clearance	New gym	04/17/2014	No
Renovation/Repair/Painting	Attic fan room above room E-131	03/17/2014	No
Renovation/Repair/Painting	Attic fan room above room E-131 - BENSON	03/17/2014	Yes
O & M	Boiler room - BENSON	03/13/2014	Yes
O & M	Boiler room	03/13/2014	No
O & M	Mechanical room	10/16/2013	No
O & M	Mechanical room - BENSON	10/16/2013	Yes
O & M	Room 204 ceiling - BENSON	01/11/2013	Yes
O & M	Room 204 ceiling	01/11/2013	No
O & M	Boiler room - BENSON	05/11/2010	No
O & M	Boiler room	05/11/2010	No
O & M	various locations	08/24/2009	No
O & M	various locations - BENSON	08/24/2009	Yes
Renovation/Repair/Painting	Restroom across from Classroom F210 - BENSON	12/30/2008	Yes
Renovation/Repair/Painting	Restroom across from Classroom F210	12/30/2008	No
Renovation/Repair/Painting	Classroom C102	07/19/2008	No
Renovation/Repair/Painting	Classroom C102 - BENSON	07/19/2008	Yes
O & M	Boiler room - BENSON	06/22/2004	Yes

Activity Type	Location	Start Date	Related Documents
O & M	Boiler room	05/22/2004	No
O & M	Room D145	03/23/2004	No
O & M	Room D145 - BENSON	03/23/2004	No
O & M	C-Wing - BENSON	06/12/2002	No
O & M	C-Wing	06/12/2002	No
O & M	D-wing	06/12/2002	No
O & M	Boiler room entrance	06/12/2002	No
O & M	Boiler Room	12/28/2000	No
O & M	Boiler Room	12/28/2000	No
O & M	Boiler Room	12/28/2000	No
O & M	Boiler Room - BENSON	12/28/2000	Yes
O & M	Boiler Room - BENSON	12/28/2000	Yes
O & M	Boiler Room - BENSON	12/28/2000	Yes
O & M	Tech net room above ceiling - BENSON	03/10/1999	Yes
O & M	Tech net room above ceiling	03/10/1999	No
O & M	Roof area by Boiler room	07/29/1998	No
O & M	Roof area by Boiler room - BENSON	07/29/1998	Yes
O & M	Athletics Room - BENSON	10/28/1997	Yes
O & M	Athletics Room	10/28/1997	No
O & M	Rooms 107, 109, 201, 204, 109, 210, 214, 217	11/12/1996	No
O & M	Rooms 107, 109, 201, 204, 109, 210, 214, 217 - BENSON	11/12/1996	Yes
O & M	Boiler room, Machine Shop - BENSON	08/01/1996	Yes
O & M	Boiler room, Machine Shop	08/01/1996	No
O & M	Roof	04/02/1996	No
O & M	Roof - BENSON	04/02/1996	Yes

SCHOOL BUILDING IMPROVEMENT BOND

Building Information Modeling Guidelines

ACKNOWLEDGEMENTS

Portland Public Schools (District) and HEERY, as the District's Program Manager would like to thank and acknowledge the following agencies and projects. Their collective vision, practice and philosophy in the implementation and use of Building Information Modeling have served as a guide for the development of this guideline document.

Broward County Health – BIM Standards developed by Proactive Controls Group

OUS/OHSU - Collaborative Life Sciences Building & OHSU Skourtes Tower Project BIM Management Plan developed by SERA Architects and JE Dunn Construction Company

San Diego Community College District – BIM Standards for Architects, Engineers & Contractors – Version 2.0

Penn State University – "BIM Project Execution Planning" developed for the buildingSMART alliance Project by The Computer Integrated Construction Research Group

Portland Public Schools is an equal opportunity educator and employer.

1. INTRODUCTION

The intention of this BIM (Building Information Modeling) Guideline document is to identify and formalize the BIM process for all future PPS projects. When BIM expectations are clearly defined and understood by all project team members, everyone benefits, and we, the Owner, are able to realize more value from the BIM process being utilized on our projects. This document is not intended to supersede any other PPS standards or guidelines, but rather to supplement and clarify in more detail our BIM expectations for PPS projects and should be utilized as an instructional guideline for utilizing BIM to deliver projects in compliance with PPS standards and guidelines.

The following matrix represents PPS's goals and objectives for utilizing the BIM process

Project Goal	Objective	Project Timeframe
Better communicate with stakeholders and public regarding PPS projects	Improve oversight and public transparency through project visualization	Design and Construction Phases
Paperless review, research and internal presentation processes.	Increase project team sustainable practices through elimination of paper consumption	Throughout life of project
Develop, record and analyze metrics to improve the project delivery process	Improve project delivery through eliminating recurring/foreseeable conflicts/errors requiring additional resources to resolve	Throughout life of project
Reduce funding required to successfully deliver projects to stakeholders	Identify and eliminate conflicts before construction begins Identify alternative designs/process to allow for more efficient construction techniques	Design and Construction Phases
Reduce time required to successfully deliver projects to stakeholders	Identify and eliminate conflicts before construction begins and eliminate re-work Identify alternative designs/process to allow for more efficient construction techniques	Design and Construction Phases
Increase quality of built environment delivered by PPS projects	Identify and eliminate issues that could impact project quality in the field (i.e. shop vs. field welding)	Design and Construction Phases
Improve PPS's ability to provide safe/secure facilities and complete projects safely	Improve understanding of built-environment during design using project visualization Utilize "timelining" to visualize sequence of construction to identify and eliminate dangerous situations	Design and Construction Phases

2. BIM-Related Project Planning

A. Project BIM Execution Planning

A formal BIM Execution Plan (BIMEP) for each PPS project will be created using some modified format of the Penn State BIM Project Execution Plan (download at www.engr.psu.edu/bim). The BIM project execution planning process for each project will be authored by PPS, and will include collaborative input from the entire project team. Each BIM Project Execution Plan will be specific to the unique aspects of its representative project, but will remain within the BIM guidelines set forth within this document.

B. BIM-Related Project Master Schedule Activities

Each PPS project will be managed in accordance with a Project Master Schedule that will identify all key activities associated with the Project. The schedule will include a logic network to relate design and construction activities/durations/constraints in relationship to other project activities. Meeting(s) that involve PPS and key decision makers for the project team (including trade contractors if possible) will be conducted to establish an integrated schedule. The process will be collaborative, requiring input and concessions from all participants, with the ultimate goal of defining a critical-path methodology (CPM) schedule that meets PPS's requirements for the successful design and construction of the Project, and is achievable by each team member.

The project master schedule will incorporate the following BIM activities, at a minimum,

- Development of BIM Execution Plan
- Clash Detection/Reconciliation processes
- Integrated Concurrent Engineering (ICE) sessions
- Presentations of virtual model to Board of Education or other groups as required by PPS
- Submission dates of Design Models to PPS
- Submission date of Final As-Built Model and enhanced .PDF as-built records

Subsequent design and construction schedules shall be coordinated based on the dates, logic and constraints of the Project Master Schedule and the BIM requirements contained therein. Each member of the Project Team shall be responsible to update their portion of the schedule and incorporate it into their work plan for accomplishing their specific scope of work.

3. Model Uses

A. Design Authoring

See Section 4 (Model and Data Requirements)

B. Models to Communicate with Stakeholders and End-Users

The Project Team shall utilize models to communicate with stakeholders and end-users on a regular basis, as defined by PPS, throughout the project. BIM uses for such communication shall include, but not be limited to:

- 3D models developed for Schematic Design (or earlier) through Construction Documents
- 3D design review, including model walk-through
- 3D design mockups
- Building vs. site massing renderings and relative impact of the building/site on the surrounding neighborhood/community

C. Area Analysis

The BIM model shall be used as a tool to verify the program area matches the approved program throughout the entire design process. This will prevent creep in the building area and avoid designing a building that is beyond the scope and area as established.

D. EXISTING CONDITIONS MODELING

For all PPS projects, the exlsting site utilities, structures, facades and conditions at project interface points (between old and new construction) shall be validated and modeled by the Design Team. The level of dimensional accuracy for systems/structures/finishes that the Project must align/connect with shall be In accordance with "As-Builts" the table located in section 4k.

Additionally, any and all historically or culturally significant elements of the Project that shall be disturbed, or potentially disturbed, during the course of the Project shall also be fully documented. Depending upon the project, a model of the site may be obtained from PPS (if available) or commissioned by an external consultant using an approved 3D site and utility modeling BIM tool or as a part of the design scope of work for the project.

For all projects, the modeling of existing buildings shall be performed based upon Design Team conducted field verification or electronic measurements (ie "laser scanning") to develop a dimensionally accurate as-built model of the existing conditions of the facility. If the as-built model is provided by PPS, the Design Team shall validate and document the accuracy of the model prior to using it. Accuracy and tolerances are defined in Sectlon 4K (Model Accuracy and Tolerances). The General Contractor shall verify and accept the Design Team's existing conditions model(s) in writing prior to their use.

E. 3D SITE LOGISTICS PLANNING

The General Contractor shall provide PPS with a 3D site logistics planning model that illustrates how the site will be utilized, including cranes, lay down areas, traffic routing (including pedestrians) etc during construction. All elements within the model, such as cranes, shall be 3D parametric objects. 2D site logistics plans shall be created from the model.

F. 3D COORDINATION

See Section 5 (BIM Coordination)

G. 4D SCHEDULING

The Project Team shall propose at least two applIcations of 4D scheduling for aspects of the project where schedule visualization would help reduce project risk. These uses do not include site logistics planning or minimum planning process outlined below, but could include items such as construction sequencing visualization, Owner move-in sequencing, internal stakeholder transition/phasing, structural erecting vs. occupied adjacent space analysis, etc. Once the proposed uses for 4D scheduling are accepted by PPS, the Project Team, through the General Contractor shall execute the 4D scheduling and subsequent 4D schedule updating from the start to the completion of that particular aspect of the work.

The construction planning process requires the sequencing of activities in space and time. Linking the BIM model with an external schedule will allow the construction team to visualize the construction virtually, giving the construction team improved accuracy in construction sequencing and coordination. 4D simulation and sequencing is required, at a minlmum, on the following:

Site Model:	Excavation, retaining walls and main line underground utilities
Structural System:	Entire structural system including foundations, grade beams, slabs on grade, columns, load bearing walls, and floor and roof decking
Exterior Building Shell:	Walls, curtain walls, openings, glazing

Interior Core:	Walls
Roof System:	Roof assembly, major equipment and openings
Mechanical System:	Main ducting and equipment

H. 5D Quantity Verification

The General Contractor shall use the design models (and construction models, if available) to validate the material quantities it uses in creating the project estimate. The General Contractor shall provide PPS with the quantities extracted from the models, along with their manually generated takeoff quantities, each time it provides a project estimate to PPS.

If the General Contractor is involved with the project during the design phase and has specific modeling and/or naming conventions, the General Contractor shall convey these requests to the Design Team in writing, and the Design Team shall make every effort to accommodate the General Contractor's requests.

I. Facility Maintenance Modeling

See Section 7 (BIM Facility Maintenance Models and Data)

J. Non-Required BIM Uses

PPS encourages, but does not require, the Design and Construction Teams to utilize BIM beyond the scope of what is defined in this BIM Guideline document, including but not limited to the following:

- Energy, lighting (day and artificial), mechanical, structural design analysis
- Code verification analysis (Solibri)
- 3D pre-fabrication mockups
- 5D cost estimating (5D quantity verification is required)

If PPS decides to require any of these BIM uses, beyond what is specifically defined in this BIM Guideline document, PPS will clearly define the requirements in the RFP. Whether required by this document or through project specific RFP, each BIM use will be clearly defined in the BIM Project Execution Plan.

4. Model and Data Requirements

A. Design Model Requirements

All designers shall use Autodesk Revit software for design or an equivalent software system that is acceptable to PPS that the same utility to PPS as Revit including compatibility with PPS software systems/data. Architects will use Revit Architecture, structural designers will use Revit Structure, and mechanical, electrical, plumbing, and fire protection designers will use Revit MEP – all of which have been combined In the current version into a package called "Revit".

Parametric links should be maintained within the models at all times to enable automatic generation of all plans, sections, elevations, details, and schedules as well as 3D views. As such, the expectation shall be that all 2D representations of the design are fully coordinated with the concurrent building model.

Designers shall not insert 2D CAD based content into the models because this degrades model performance. If DWGs are absolutely required, link them to the Revit model only – do not insert them into the model. DWGs and other CAD formats should be excluded from Revit families brought into the model.

All information needed to describe the detailed design will be graphically or alphanumerically included in and derived from these design models only, except for the Specifications. Engineering details or other schematic diagrams (controls, wiring, flow diagrams) that cannot be derived from the model must still be included within the Revit model. 2D project drawings and documentation shall not be created outside of

Portland Public Schools is an equal opportunity educator and employer.

the BIM authoring software (Revit). However, this does not imply that the model itself is a contract document.

Both the Design Team and the Construction Team shall be responsible to incorporate BIM into the project in accordance with these guidelines. In the case where a particular sub-consultant or sub-contractor does not possess the requisite experience in BIM, the Architect or General Contractor shall assume the responsibility for implementing those aspects the sub-consultant/sub-contractor are responsible for.

SITE MODELS

Existing Conditions Model: Modeling of the project site is required for new construction and renovation projects. Depending on the project site, a model may be obtained from PPS. For all projects, modeling of the existing project site shall be performed based on District-provided as-built information, with field verification conducted by the project team to validate the level of accuracy. Existing conditions to be modified or demolished by a proposed renovation shall be modeled to the appropriate LOD as defined by the BIM Guidelines and the PPS Project Manager to properly represent and coordinate the Work to be completed.

Civil Model: The deliverable model shall be developed to include the systems as defined by the BIM Guidelines. BIM authoring software shall be used to model parametric components and objects not provided by the District. Modeled objects shall contain parameters and associated data applicable to the building system. The level of detail shall evolve as established by the model progression specification. The model will show site conditions and proposed grading, vertical elevation changes at walls, and building pads for use in joining 3D utility and building models into a common vertical and horizontal datum. The model can be used to locate buildings and generate one overall model of buildings, surfaces, and site utilities. The surface elevations will be based on available topography received from record drawings or survey. The surface will show detailed features such as existing walkways, roads, curbs, ramps, sport court and field striping, parking lot striping, and walls, with detailed elevation information for each feature. Components shall be modeled to produce grading plans and site sections.

Utility Model: All existing and new utilities to point of connection and within project boundary to within five feet of the building footprint shall be modeled, including hydrants, shut off valves, cleanouts, manholes, PIV, FDC and backflow preventers. The modeled pipe systems shall contain the following database information and produce accurate plans and profiles for the project site. Where depths of existing utilities are unknown, the project team will pothole utilities for accurate depth.

Systems to be model include but are not limited to,

- Storm Sewer
- Sanitary Sewer
- Potable Water
- Fire Service Water
- Irrigation Main
- Cold/Hot Water Return/Supply
- Natural Gas
- Air Supply/Vacuum
- Electrical
- Communications (voice & data systems)
- Landscaping (excavation and root zones only)

Information to be included in the model:

- Pipe material, size
- Line slope, elevation
- Year installed
- Pull boxes, clean outs or other access points
- Location of markers/tracer wire connections

ARCHITECTURAL MODELS

The deliverable model shall be developed to include the systems as defined by the BIM Guidelines. The level of development shall evolve as established by the model progression specification, but at minimum must include all features to accurately represent the design solution. The system models shall be linked into the architectural model and be displayed when producing schematic design, design development and construction documents.

Existing Conditions: Modeling of existing structures is required for new construction and renovation projects. Depending on the project, a model may be obtained from PPS. For all projects, the modeling of existing buildings shall be performed based on District-provided as-built information, with field verification conducted by the project team to validate the level of accuracy. Existing conditions to be modified or demolished by a proposed renovation shall be modeled.

Model Components: Model components shall contain parameters and associated data applicable to the building system. This includes: Phase Created, Dimensions, Model, Manufacturer, Assembly Code - UniFormat Code and Specification Number. The object attribute information that is input during design will be used throughout the building lifecycle and integrated into the final as-built database.

Minimum Architectural Model Requirements:

General: Model shall be developed using BIM Authoring software. Parametric links shall be maintained within the model to enable automatic generation of all plans, sections, elevations and schedules.

Architectural Site Plan: Site amenities and other architectural elements typically included on enlarged scale site plans.

Rooms/Spaces: Room names and numbers, accurate net square footage, occupancy, number of occupants, finish properties, programmatic information and space inventory information.

Walls and Curtain Walls: Interior and exterior walls shall be modeled to exact height, length, width, finish and rating (thermal, acoustic and fire) to properly reflect wall types. Curtain walls system to have mullions and window panes according to their true profile.

Doors, Windows and Louvers: Doors, windows and louvers shall be modeled to represent actual size, type and location, both interior and exterior.

Roof: The model shall include the roof type with overall thickness including insulation, drainage system, major penetrations, access ladders and specialties.

Ceilings: Ceiling system, soffits, openings, slopes and accessories, including framing and bracing.

Vertical Circulation: Elevator, stairs, handrails and guardrails.

Architectural Specialties and Casework: All architectural specialties, including toilet accessories, toilet partitions, grab bars, lockers, display case, shelving and other interior architectural elements. Casework shall be modeled and include dimensions, WI number and additional information as defined for model components.

Signage: All signage components shall be modeled.

Schedules: Provide door, window, door hardware, keying and finish schedules. Information must be extracted from the model components.

Fixtures and Equipment: Fixtures and equipment shall be modeled to meet layout requirements.

Access/ADA: Access areas in front of equipment, to points of general public space (i.e. face of ceiling or wall) shall be provided in the model to ensure accessibility for operational and maintenance servicing of equipment. ADA clearances shall also be models to facilities hard clash and clearance detection.

Portland Public Schools is an equal opportunity educator and employer.

Design/Build zones: Allowances shall be included in the various models to provide for routing of design/build elements that may be deferred in the design or permitting process. All such areas shall be coordinated with the trade contractors or other designers.

SYSTEM MODELS

System models are to be developed as separate BIM models by floor. The deliverables shall be developed to include the systems as defined by the BIM Guidelines. BIM authoring software shall be used to model parametric components and objects. Modeled objects shall contain parameters and associated data applicable to the building system. The level of detail shall evolve as established by the model progression specification. System models are required for structural, mechanical, electrical, communications (including voice and data systems), plumbing and fire protection.

Model Components: Model components shall contain parameters and associated data applicable to the building system. This includes: Phase Created, Dimensions, Model, Manufacturer, Assembly Code - UniFormat Code and Specification Number. Light fixture components shall include lamp type and photometric information including light loss factor, initial intensity, initial color and color filter. The object attribute information that is input during design will be used throughout the building lifecycle and integrated into the final as-built database.

Minimum Structural Model Requirements:

Foundations: All foundation and footing elements including zones of influence

Floor Slabs: Structural floor slabs including recesses, curbs, pads and major penetrations.

Structural Steel Framing and Decking: All steel framing including, columns, primary and secondary framing members, bracing, roof deck and floor deck.

Cast-in-Place Concrete: All retaining walls, footings, foundations, columns and beams.

Pre Cast Concrete: All primary and secondary elements.

Expansion Joints: Joints shall be accurately depicted.

Stairs: Stair framing members and necessary openings for the stair system.

Shafts and Pits: All shafts, pits and openings.

Minimum Mechanical Model Requirements:

HVAC Equipment: AHU, Fans, VAV boxes, compressors, chillers, cooling towers, air handlers, boilers, hoods and other major equipment.

HVAC Distribution: Air distribution ducts for supply, return, ventilation and exhaust ducts, duct hangers, seismic bracing, fire smoke dampers, control systems, registers, diffusers, grilles and louvers. Ducting to be modeled to outside face dimension.

Mechanical Piping: All piping 1" diameter and greater shall be modeled to outside diameter of pipe or pipe insulation, whichever is greater. Valves such as isolation or balancing valves and other accessories such as hangers shall also be modeled. Banks or groups of piping, although may be smaller in diameter than listed here, that pose a potential coordination or clash issue given the number of pipes involved and/or their routing, should also be modeled as a group.

Equipment Clearances & Service Zones: Clearances shall be modeled for use in clash detection process and maintenance access requirements. Access zones to face of ceiling shall be modeled to verify ease of access above ceiling for servicing.

Minimum Plumbing Model Requirements:

Fixtures and Equipment: All plumbing fixtures, sinks, toilets, carriers, floor and roof drains, leaders, sumps, booster pumps, grease interceptors, sediment separators and other major equipment.

Piping: All piping to five feet outside building footprint, including hot and cold water piping, sewer piping, storm drain piping, gas piping, pipe hangers, seismic bracing, valves and cleanouts. Piping shall be modeled to outside diameter of pipe or pipe insulation, whichever is greater. Banks or groups of piping, although may be smaller in diameter than listed here, that pose a potential coordination or clash issue given the number of pipes involved and/or their routing, should also be modeled as a group.

Equipment Clearances: Clearances and access zones shall be modeled for use in clash detection process and maintenance access requirements

Minimum Electrical/Communications/ Security Model Requirements:

General: Model shall be documented in the BIM Authoring software. Parametric links shall be maintained within the model to enable automatic generation of all plans, sections, elevations and schedules.

Power: Transformers, emergency generators, main and distribution panels, switch gear, outlets, switches and junction boxes. Electrical feeders and conduits 2" and greater shall be modeled, including underground.

Lighting: Permanently mounted light fixtures, lighting controls, switches and junction boxes.

Communications: All existing and new communications service controls, audio equipment, speakers, phone and data ports and connections, both above ground and underground. Projector and image throw to verify the projected image is not obstructed. Cable tray routing with hanger supports and seismic bracing. Communications conduit 2" and greater shall be modeled

Security: All security devices, keypads, cameras and motion sensors

Equipment Clearances: Clearances and access zones shall be modeled for use in clash detection process and maintenance access requirements.

Minimum Fire Protection Model Requirements:

General: Model shall be documented in the BIM Authoring software. Parametric links shall be maintained within the model to enable automatic generation of all plans, sections, elevations and schedules.

Fire Protection System: All fire protection components including main lines, branch piping, hangers, seismic bracing, sprinkler heads, valves, drains, pumps, tanks, sensors, heat and smoke detectors, notification devices, control panels and related equipment.

B. REVIT MODELING PROTOCOLS

The following modeling protocols shall be applied:

- Rooms
  - Rooms will be accurately bounded, completely enclosed, and not overlapping with other rooms. All "not placed" rooms shall be removed from the model.
  - Rooms will contain property data with the correct name and number.
  - Rooms will contain property data assigning it to the correct space, department, area, and level, such that accurate square footages can be obtained for rooms, spaces, areas, departments, levels, and entire building.
  - Rooms shall be a continuous cube with the height of the cube corresponding to the ceiling height.
- Closure and Adjacency

Portland Public Schools is an equal opportunity educator and employer.

- Rooms, spaces, departments etc. shall be properly enclosed using floors, walls, and ceilings that are touching, but not overlapped.
- Adjacent model elements shall be touching but not overlapped.
- The building envelope shall be "air tight".

- Walls
  - Walls shall contain the correct wall types (not generic).
  - Walls shall be modeled to the correct height based on wall type.
  - Interior and exterior walls shall be modeled to exact height, length, width, finish and rating (thermal, acoustic and fire) to properly reflect wall types. Curtain walls system to have mullions and window panes according to their true profile.
- Doors
  - Doors shall be associated with the correct level.
  - Doors shall contain the correct door type and hardware set type as property data.
  - Doors, windows and louvers shall be modeled to represent actual size, type and location, both interior and exterior.
- Roof
  - The model shall include the roof type with overall thickness including insulation, drainage system, major penetrations, access ladders and specialties.
- Ceilings
  - Ceiling system, soffits, openings, slopes and accessories, including framing and bracing.
- Vertical Circulation
  - Elevator, stairs, handrails and guardrails.
- Architectural Specialties and Casework
  - All architectural specialties, including toilet accessories, toilet partitions, grab bars, lockers, display case, shelving and other interior architectural elements. Casework shall be modeled and include dimensions, WI number and additional information as defined for model components.
- Signage
  - All signage components shall be modeled.
- Schedules
  - Provide door, window, door hardware, keying and finish schedules. Information must be extracted from the model components.
- Fixtures and Equipment
  - Fixtures and equipment shall be modeled to meet layout requirements.
- Minimum Structural Model Requirements:
  - General: Model shall be documented in the BIM Authoring software. Parametric links shall be maintained within the model to enable automatic generation of all plans, sections, elevations and schedules.
  - Foundations: All foundation and footing elements including zones of influence
  - Floor Slabs: Structural floor slabs including recesses, curbs, pads and major penetrations.
  - Structural Steel Framing and Decking: All steel framing including, columns, primary and secondary framing members, bracing, roof deck and floor deck.
  - Cast-in-Place Concrete: All retaining walls, footings, foundations, columns and beams.
  - Pre Cast Concrete: All primary and secondary elements.
  - Expansion Joints: Joints shall be accurately depicted.
  - Stairs: Stair framing members and necessary openings for the stair system.
  - Shafts and Pits: All shafts, pits and openings.
- M/E/P/FP/LV Models
  - General: Model shall be documented in the BIM Authoring software. Parametric links shall be maintained within the model to enable automatic generation of all plans, sections, elevations and schedules.
  - Sloped pipe is difficult to model in Revit. If the M/E/P/FP/LV engineers choose to model the sloped pipe as a flat pipe, a clearance box must be placed around the slope pipe such that

the top of the box is at the highest designed point of the pipe and the bottom of the box is at the lowest designed point of the pipe. This clearance box will then represent the area that the sloped pipe will occupy.

- For items like pneumatic tubing that are not modeled during design, the design team shall add a clearance zone to represent the space required for the system that will be designed in the future.
- Medical equipment supports shall be modeled by the design team to the level of detail required by the Project BIM Execution Plan.
- Distinct Types shall be created for M/E/P/FP/LV systems. For example, Pipe Types for Chilled Water, Heating Hot Water, Copper, Steel, etc. shall all be distinct.
- General: Model shall be documented in the BIM Authoring software. Parametric links shall be maintained within the model to enable automatic generation of all plans, sections, elevations and schedules.
- HVAC Equipment: AHU, Fans, VAV boxes, compressors, chillers, cooling towers, air handlers, boilers, hoods and other major equipment.
- HVAC Distribution: Air distribution ducts for supply, return, ventilation and exhaust ducts, duct hangers, seismic bracing, fire smoke dampers, control systems, registers, diffusers, grilles and louvers. Ducting to be modeled to outside face dimension.
- Mechanical Piping: All piping 1" diameter and greater shall be modeled to outside diameter of pipe or pipe insulation, whichever is greater.
- Fixtures and Equipment: All plumbing fixtures, sinks, toilets, carriers, floor and roof drains, leaders, sumps, booster pumps, grease interceptors, sediment separators and other major equipment.
- Piping: All piping to five feet outside building footprint, including hot and cold water piping, sewer piping, storm drain piping, gas piping, pipe hangers, seismic bracing, valves and cleanouts. Piping shall be modeled to outside diameter of pipe or pipe insulation, whichever is greater.
- Equipment Clearances: Clearances and access zones shall be modeled for use in clash detection process and maintenance access requirements
- Power: Transformers, emergency generators, main and distribution panels, switch gear, outlets, switches and junction boxes. Electrical feeders and conduits 2" and greater shall be modeled, including underground.
- Lighting: Permanently mounted light fixtures, lighting controls, switches and junction boxes.
- Communications: All existing and new communications service controls, audio equipment, speakers, phone and data ports and connections, both above ground and underground. Projector and image throw to verify the projected image is not obstructed. Cable tray routing with hanger supports and seismic bracing. Communications conduit 2" and greater shall be modeled
- Security: All security devices, keypads, cameras and motion sensors
- Equipment Clearances: Clearances and access zones shall be modeled for use in clash detection process and maintenance access requirements.
- Fire Protection System: All fire protection components including main lines, branch piping, hangers, seismic bracing, sprinkler heads, valves, drains, pumps, tanks, sensors, heat and smoke detectors, notification devices, control panels and related equipment.
- Equipment Clearances & Service Zones: Clearances shall be modeled for use in clash detection process and maintenance access requirements. Access zones shall be modeled to verify ease of access above ceiling for servicing.

- Miscellaneous
  - Model elements shall not be duplicated. For example, columns should not be in both the Architect's and Structural Engineer's model, but should only be in one model. Models should then be linked to view other elements.
  - All model elements shall be parametric with intelligence (not generic) so that they can be quantified.

- Objects, spaces, etc. shall use PPS defined nomenclature, or if none exists, then industry standard nomenclature shall be applied.
- Object shall be correctly defined: ie. use a table object for a table – do not "fudge it" with slab commands. It may look right but it will not be right for scheduling, analysis, as-built model or interoperability with other software.

C. DELIVERABLES SCHEDULE

	PHASE								
	MP	100% SD	90% DD	100% DD	50% CD	90% CD	Bid Docs	SC	
Pre-Design									
BIM Execution Plan	X								
Space Validation Schedule	X								
Concept Model (Massing)	X								
Design									
Presentation Renderings/Fly-Throughs	X	X	X		X				
Virtual Design Coordination (Clash)		X	X	X	X	X			
Discipline Coordination Model(s)				X	X	X	X		
For Construction Model							X		
Construction									
Trade Coordination Model(s)							X		
Updated Record Model							X		
Closeout									
As-Built Model								X	

MP = MASTER PLANNING

C. REVIT WARNINGS

The Design Team shall correct the following Revit warnings, following these additional protocols:

- There shall be no overlapping of design elements, especially walls and room boundaries
- Walls shall be connected to the top of slap at the bottom of the wall and bottom of the slab at the top (If full height)
- Floors shall be subdivided by room
- Space enclosures shall be bounded by walls and floors
- Spaces shall have a name and a room number
- There shall be only one space instance per space, no duplicates
- Orphans shall be resolved (resulting from using copy/paste)
- Mechanical spaces shall be defined floor to floor, unless there Is a plenum
- Plenums shall be defined as a separate space
- Mechanical systems shall be defined – every element shall belong to a system. This can be verified using the Revit MEP system browser.
- Sidewall diffusers shall be placed in a defined space and attached to corresponding walls.

- The Revit MEP file shall be linked to the Revit architectural file – This can be checked by using the Revit System Browser and verifying that the space name and space number columns are populated
- System components within a workset shall belong to that workset
- Mechanical zones shall be defined
- There shall be no unassigned components (View/User Interface/System Browser)
- MEP space names shall be mapped to Architectural room names

D. Z-Dimension Accuracy

All elements within the design and construction models will be accurately depicted in the "Z" dimension, including, but not limited to, wall partitions and ceilings. For walls, the studs shall be represented accurately and the drywall on both sides represented to the height of the highest drywall on either side of the wall. For Instance, if a drywall partition has drywall on one side that is 6" above the ceiling and on the other side the drywall extends to the bottom of deck, the drywall shall be represented to bottom of deck in the Revit model.

E. Model Definition and Progression Specification

During the Project BIM Execution Planning process, a Model Definition and Progression Specification (MDPS) will be collaboratively created and will include the detailed Uniformat Classifications and LOD as defined and represented in the example MDPS at Attachment 1. The elements within the design and construction models will reflect the LOD and geometric properties of the materials and/or systems in the model as defined in the project MDPS at each stage of the project.

Level of Detail (LOD) identifies the specific content requirements for each model element at each phase of a project. There are five progressively detailed levels of completeness. Each subsequent level builds on the previous level. The LOD described below shall be used to complete the model element table, which establishes the LOD for each model element at each phase of a project. As defined by the AIA Document E202 - 2008

- LOD 100
  - Model Content Requirements: Overall building massing indicative of area, volume, location and orientation modeled in BIM.
  - Authorized Uses: The model may be analyzed based on volume, area and orientation by application of performance analysis software. The model may be used to develop a cost estimate based on current area, volume or similar conceptual estimating techniques. The model may be used for project scheduling, project phasing and overall duration.
- LOD 200
  - Model Content Requirements: Model elements are modeled as generalized systems or assemblies with approximate quantities, size, shape, location and orientation. Non-geometric information shall be attached to model elements.
  - Authorized Uses: The model may be analyzed for performance of selected systems by application of performance analysis software. The model may be used to develop cost estimates based on the approximate data provided. The model may be used to show ordered, time-scaled appearance of major elements and systems
- LOD 300
  - Model Content Requirements: Model elements are modeled as specific assemblies accurate in terms of quantity, size, shape, location and orientation. Non-geometric information shall be attached to model elements
  - Authorized Uses: The model is suitable for the generation of traditional construction documents and shop drawings. The model may be analyzed for performance and coordination of selected systems by application of performance analysis and clash detection software. The model may be used to develop cost estimates based on specific data. The model may be used to show ordered, time scaled appearance of detailed elements and systems

- LOD 400
  - Model Content Requirements: Model elements are modeled as specific assemblies that are accurate in terms of size, shape, location, quantity and orientation with complete fabrication, assembly and detailing information. Non-geometric information may also be attached to model elements.
  - Authorized Uses: Model elements are virtual representations of the proposed element and are suitable for construction. The model may be analyzed for performance and coordination of selected systems by application of performance analysis and clash detection software. Costs are based on the actual cost of specific elements at buyout. The model may be used to show ordered, time-scaled appearance of detailed specific elements and systems including construction means and methods
- LOD 500
  - Model Content Requirements: Model elements are modeled as constructed assemblies that are actual and accurate in terms of size, shape location, quantity and orientation. Non-geometric information may also be attached to model elements.
  - Authorized Uses: The model may be utilized for integration into FM platform, maintaining, renovating, and adding to the project.

F. Completeness of Models

Physical building elements within the project will be modeled (except those clearly defined and excluded in the project MDPS) and will represent the complete design intent for each level and element of the building. For example, even if a single level of a new hospital patient tower is exactly the same as another level, each level will still be distinctly and completely represented in the design and construction models. This requirement will not allow the "short-cut" practice of using one part of the 3D model to represent a different part of the building on the 2D drawings.

G. Model Property and Parameter Data

Both the Design and Construction Models will accurately represent the geometric properties of the materials and/or systems in the model to the LOD defined in the project MDPS. All equipment schedules must be generated from the parameters embedded in the Revit model objects. Parameter fields shall be populated either centrally in the model or applied to individual Architectural and/or M/E/P/FP/LV system families.

H. Revit Model Matrix

The Design Team, in collaboration with the Construction Team, shall create a Revit Model Matrix that defines worksets, links, annotation, and copy monitoring, all of which shall be fully defined in the Project BIMEP. See Attachment 2 for an example Revit Model Matrix.

I. Tracking Model Revisions from the Construction Documents Stage Forward

After the start of the Construction Documents stage of the project through final project closeout, the Design Team shall track all changes to the model using a Model Revisions Log for each discipline. This Log shall contain, at a minimum, a revision number, description of the model revision, date of revision, person who made the revision, and 2D sheet numbers of sheets affected by the revision.

J. 2D Supplemental Drawings During Construction Administration

During construction administration, after 100% CD deliverables have been produced, PPS requires that all supplemental 2D documentation in drawing form for RFIs, ASIs, change orders, etc. be produced within the Revit design models. This will ensure that all the relevant drawing data is in one place (ie. the Revit file) and has been captured in electronic format, not hand-sketched.

K. Model Accuracy and Tolerances

The following tolerances apply to elements that require LOD 300 or higher:

PHASE	DISCIPLINE	TOLERANCE
EXISTING CONDITIONS MODELS	CIVIL (UNDERGROUND)	ACCURATE TO +/- [6"] OF ACTUAL SIZE ACCURATE TO +/- [12"] OF ACTUAL LOCATION
EXISTING CONDITIONS MODELS (ACCESSIBLE ITEMS)	ARCHITECTURAL STRUCTURAL M/E/P/FP	ACCURATE TO +/- [1/8"] OF DESIGN INTENT SIZE ACCURATE TO +/- [2"] OF DESIGN INTENT LOCATION
DESIGN DOCUMENT MODELS	CIVIL ARCHITECTURAL STRUCTURAL M/E/P/FP/LV	ACCURATE TO +/- [1/8"] OF DESIGN INTENT SIZE ACCURATE TO +/- [2"] OF DESIGN INTENT LOCATION
SHOP DRAWING MODELS	CIVIL INTERIORS ENVELOPE STRUCTURAL M/E/P/FP/LV	ACCURATE TO +/- [1/16"] OF ACTUAL SIZE ACCURATE TO +/- [1"] OF ACTUAL LOCATION
AS-BUILT MODELS	INTERIORS NOT RELATED TO CODE	ACCURATE TO +/- [1/8"] OF ACTUAL SIZE ACCURATE TO +/- [2"] OF ACTUAL LOCATION
AS-BUILT MODELS	INTERIORS RELATED TO CODE	ACCURATE TO +/- [1/8"] OF ACTUAL SIZE ACCURATE TO +/- [1/4"] OF ACTUAL LOCATION
AS-BUILT MODELS	CIVIL ENVELOPE STRUCTURAL M/E/P/FP/LV	ACCURATE TO +/- [1/16"] OF ACTUAL SIZE ACCURATE TO +/- [1"] OF ACTUAL LOCATION

L. Model Quality Control

The Design Team shall establish and use in-house model quality control guidelines and exchange protocols. Good BIM practices include but are not limited to:

- Adherence to the AIA standards
- Use of industry accepted nomenclature for objects and spaces
- Use of viewing, checking, and standard output file formats as needed
- Use of open standards and IFC compliance for file transfers
- Performance of weekly model cleanup and family integrity checks
- Use of model checking software such as Solibri
- Use of Navisworks (or equivalent) clash detection software (required)

CHECKS	DEFINITION	RESP PARTY	RECOMMENDED SOFTWARE	FRE-QUENCY	DELIVER-ABLE

VISUAL CHECKS	Ensure there are no unintended model components and the design intent has been followed	Design Team	Revit	Weekly or More	Written Commentary
INTERFERENCE CHECKS	Detect problems in the model where two building components are clashing including soft and hard clashes	Design / Construction Teams	Navisworks	Bi-Weekly / Weekly or More	Clash Report
STANDARDS CHECKS	Ensure that the BIM and CAD Standard have been followed (fonts, dimensions, line styles, levels/layers, etc)	PPS / Design Team	N/A	Prior to Deliverables	Written Commentary
MODEL INTEGRITY CHECKS	Describe the QC validation process used to ensure that the Project Facility Data set has no undefined, incorrectly defined or duplicated elements and the reporting process on non-compliant elements and corrective action plans	Design Team	Solibri	Prior to Deliverables	Solibri Report

M. Object / Equipment Stripping

In order to keep model file sizes from becoming unmanageable, PPS allows "stripping" an object within the model by replacing, for instance, a manufacturer's equipment product model with a simpler object of accurate dimensions that includes connections / tie-in points. However, the required property data from the original product model must be maintained within the stripped product model so that the data can retrieved and quantified from the model.

N. Software Interoperability

Software interoperability is the seamless exchange of data at the software level among various applications. Interoperability is achieved by assembling each application's internal data structure to a universal model. All software platforms used for PPS must be compliant with the most current version of industry Foundation Class (IFC) file format and interoperable with commercially available collaboration software applications (e.g. NavisWorks or equal).

5. BIM Coordination

A. Early Design Coordination

During the early stages of design (no later than initial DD):

- The Design Team shall submit to PPS a hierarchy of M/E/P/FP/LV systems, including system precedence and elevations that will be generally applied in designing the project systems. This hierarchy shall take into account both constructability and operations and maintenance accessibility. This hierarchy will be reviewed and approved by both PPS and the General Contractor (if engaged at that point).
- The Design Team shall create (and revise as necessary) a 3D grid file and separate 3D room number file to be used by the Design and Construction Teams during the coordination process, as well as record model submission. The 3D files are the 2D grids and room numbers that have been given a small z dimension so that they can be seen from angles other than plan view.

B. Design Coordination

The Design Team shall produce a design in which all design elements fit within the intended spaces provided, including required clearances and access requirements. To help achieve this goal, the Design Team shall have a formal 3D spatial analysis and clash resolution process.

Thls spatial analysis and clash resolution process shall include regularly scheduled clash review meetings, the use of Navisworks clash detection software (or equivalent), an area by area and discipline by discipline clash review approach, and a 3D coordination log that includes fields for, at a minimum, clash tolerance, clash name, clash group #, area, level, description, x-y coordinates, responsibillty, date identified, open/closed status, date closed, priority, and resolution. The clash name and clash group # shall correspond to saved viewpoints within the model such that clashes can be quickly and easily identified within the model.

PPS does not expect a "clash free" design. PPS does, however, expect a design that has been spatially analyzed and validated such that all systems are constructible and will fit within the spaces in which they have been designed. To confirm that this spatial validation process has occurred, PPS requires that prior to the completion of each design deliverable (SD, DD, CD), the Design Team shall publish a clash resolution report that shows that each area of the model with clashes has been validated. A matrix of clash and clearance detection analyses Is included in Appendix B.

C. Design Coordination Collaboration

PPS has taken the approach on many projects of bringlng the General Contractor and M/E/P/FP/LV Trade Contractors onto the project during the design stage with the purpose of collaborating with the Design Team for the coordination process, constructablllty reviews, and value engineering. This approach varies from project to project, and will be clearly defined in the BIM project execution planning process in order to achieve maximum collaboration while maintaining design effIciency. If PPS decides to take this approach on a project, the Construction Team will collaborate with the Design Team to provide support for the design coordination process, ultimately resulting in the signoff described In Section 5D (General Contractor Design Model Acceptance).

If engaged during design, the Construction Team shall also provide a Design Priority List to the Design Team that clearly specifies what systems need to be designed first in order to support construction (this will occur within the parameters defined in the BIM-Related Design Milestone Planning described in Section 2B). Once the Desiqn Priority List is agreed upon, the Design Team, with the support of the Construction Team, will make every reasonable effort to complete the design as defined by the design priority list.

D. General Contractor Design Model Acceptance

If the General Contractor has been engaged prior to completion of design, the General Contractor shall review the design deliverable models at the 50% Design Development, 100% Design Development, 50% Construction Documents, 75% Construction Documents, and 100% Construction Documents stages and validate that all systems will fit within the spaces in which they have been designed. If the General Contractor Is engaged after completion of design, the General Contractor shall review the 100% CD design models and valldate that all systems will fit within the spaces in which they have been designed within 31 calendar days of engagement or a duration mutually agreed upon by PPS and the General Contractor. If the General Contractor finds, during any review of design deliverable models at any stage, that systems will not fit into the spaces provided, the General Contractor will notify the Design Team through a 3D coordination log – as defined in Sections 5B (Design Coordlnation) and 5E (Construction Coordination) – within 21 calendar days of completion of the design deliverable models, and collaboratively convey the results of their findings along with recommended solutions to each issue. The Design Team will then be responsible to make the necessary revisions to the design so that the systems will fit.

After revisions have been made to the design models, the General Contractor will verify in writing its acceptance of the design models as follows:

Portland Public Schools is an equal opportunity educator and employer.

_____ (General Contractor) has received the following design model files _____ (list file names), dated _____ from _____ (list design author(s)), which we have reviewed and, by our signature below, verify that the design intent represented in these models is constructible and will fit in the spaces provided, including required or necessary clearances.

If the General Contractor does not notify the Design Team of constructability or space issues with the design, using a 3D coordination log, within 21 calendar days of the completion of the design deliverable models, then the design will be automatically considered accepted by the General Contractor, per the language in the acceptance paragraph above.

PPS recommends that the General Contractor involves the relevant Trade Contractors in the review of the design models and also gets them to accept the design models, but the General Contractor's acceptance of the design models will suffice for PPS's purposes.

E. CONSTRUCTION COORDINATION

The Construction Team shall provide the following, at a minimum, for construction coordination:

- Clash detection and coordination shall be done using Navisworks software (or equivalent).
- The General Contractor shall track clash resolution using a 3D coordination log that includes fields for, at a minimum, clash tolerance, clash name, clash group #, area, level, description, x-y coordinates, responsibility, date identified, open/closed status, date closed, priority, and resolution.
- Trade Contractors shall use intelligent 3D modeling software such as Revit, or DWG based software such as TSI, Cadpipe, Quickpen etc.
- The General Contractor shall require Trade Contractors to model, at a minimum, structural steel, envelope connections, secondary framing, any element that requires seismic bracing, studs, drywall, ceilings, mechanical, electrical, data, plumbing, gas, fire protection, pneumatic tube, and any racked elements.
- All Trade Contractor modeling of steel, connections, and M/E/P/FP/LV systems shall be to a fabrication level of detail. All other Trade Contractor modeling shall be as detailed as necessary to accurately represent the major construction elements being modeled (ie. curtainwall should not be modeled as a solid wall, but should have separate elements for mullions and glass).
- All models must include clearances and access zones for code and for anything requiring a human hand to touch it for operating or maintaining the facility.
- Trade Contractors shall apply the following model guidelines for models used for clash detection and coordination:
    - Purge model files of any extraneous 2D references and/or 3D rogue elements prior to submission.
    - Keep file size to minimum for application speeds.
    - Keep text and line work on different layers from 3D components where possible.
    - Cleanup drawings, remove items drawn off to the sides of drawings.
    - Use separate layers for space constraints.
    - Detach x-ref's from drawings.
    - Do not draw on the "0" layer.
    - Change view settings to 2D wireframe.
    - Place model in top view.
    - Zoom extents.
- For Trade Contractors using a DWG based modeling program, layer names do not have to be changed, but can remain according to the Trade Contractor's internal format. Trade Contractors shall provide the General Contractor (who shall provide Design Team and PPS) a layering list with a brief description of each.

- The combined coordination model for a particular area/zone must be clash free prior to the submission of Trade Contractor shop drawings. Both the combined coordination models and combined shop drawings shall be signed off by all Trade Contractors.
- For projects where structure is being installed in an area before coordination is complete in that area, all sleeve and penetration coordination must be complete prior to full construction coordination, and in time to support the structural installation.
- The General Contractor shall provide sufficient manpower to meet the construction coordination schedule and design coordination schedule.

F. Streamlining M/E/P/FP/LV Design and Coordination

In an effort to streamline M/E/P/FP/LV design and coordination, reduce inefficiency, and remove modeling redundancy between the M/E/P/FP/LV Design Team and the M/E/P/FP/LV Construction Team, PPS shall work with the Design and Construction Teams to clearly define where the M/E/P/FP/LV designers' scope of modeling work shall end and where the M/E/P/FP/LV Trade Contractors' scope of modeling work shall begin. For instance, it is not efficient for the plumbing designer to model 1" copper pipe when, in all likelihood, the plumbing contractor will both model and install the 1" line differently than shown in the design model. In this case, it would be sufficient for the plumbing designer to provide 2D schematic representation of the 1" pipe. This modeling scope distinction will be clearly defined in the BIM Project Execution Plan Model Development and Progression Specification.

G. Coordination-Enabled Pre-fabrication

PPS sees great benefit in BIM-enabled pre-fabrication and pre-assembly of systems, including increased labor efficiency, quality, and safety. PPS strongly encourages general contractors and Trade Contractors to pre-fabricate and pre-assemble (including racking multiple M/E/P/FP/LV systems) key components of the work off site such as:

- Mechanical System Ductwork
- Mechanical System Piping
- Plumbing (including medical gas)
- Electrical (including low voltage)
- Fire Protection
- Equipment (e.g., chillers, boilers, pumps, etc)
- Drywall
- Modular Head Wall Units
- Modular Restrooms
- Curtain Wall
- Building Envelope
- FF&E

Portland Public Schools is an equal opportunity educator and employer.

6. TECHNICAL INFRASTRUCTURE FOR BIM PROCESS

A. BIM INFORMATION MANAGER/INFORMATION COORDINATORS

The BIM efforts for the project shall be led by the BIM Information Manager (IM) who may be a PPS staff member or a designated project team member. The BIM IM shall be responsible for facilitating the development of the BIM Execution Plan and coordinating the various BIM related efforts of the project team. In the case of conflicts between various aspects of the BIM process, the BIM IM shall make the definitive decision which shall be binding on the team upon approval by the PPS Project Manager.

All BIM design data transfer, including BIM data from all Sub-consultants, will be overseen by a designated Design Team BIM Information Coordinator (IC). All BIM construction data transfer, including BIM data from Trade Contractors, will be overseen by a designated Construction Team BIM IC.

In addition to the Design Team and Construction Team BIM ICs, each Sub-consultant and Trade Contractor that is involved with the BIM process will also provide a BIM IC who will report to either the Design Team or Construction Team BIM IC as appropriate.

The BIM IM and each BIM IC shall have experience with relevant BIM software (ie. Revit, Navisworks, DWG based software etc.), BIM data sharing and file transfer, and BIM coordination. Resumes for BIM IC's shall be provided to PPS upon request.

B. MODEL STRUCTURE

Separate models shall be created for each discipline and shall represent portions of the building such that they are not too large for other team members to utilize efficiently for visualization and coordination. Design Models shall have worksets by floor and Construction Models shall created by area/zone. Model structure shall be fully defined in the Project BIMEP.

C. COLOR CODING OF MODEL ELEMENTS

The following colors shall be utilized for all federated models – Coordination, As-Built, and Record Models:

Architectural Models	
Architectural	white (255,255,255)
Envelope (Curtainwall, Precast, Other)	light gray (211,211,211)
Masonry	gray (128,128,128)
Structural Models	
Steel	maroon (128,0,0)
Concrete	gray (128,128,128)
Masonry	gray (128,128,128)
M/E/P/FP/LV Models	
Mechanical Ductwork Supply	Blue (0,0,255)
Mechanical Ductwork Return	Blue (153,204,255)
Mechanical Ductwork Exhaust	Blue (105,105,255)
Mechanical Piping Supply	Cyan (0,160,155)
Mechanical Piping Return	Cyan (0,255,255)
Electrical Conduit / Cable Tray	Yellow (255,255,0)
Electrical Lighting	Gold (218,165,32)

Plumbing Domestic Water	Green (124,252,0)
Plumbing Storm / Roof Drain	Green (0,100,0)
Plumbing Waste / Vent	Green (154,205,50)
Medical Gas	Green (0,155,0)
Fire Protection	Red (255,0,0)
Fire Alarm / Data/IT / Controls	Coral (255,127,80)
Pneumatic Tubing	Magenta (139,0,139)
Miscellaneous Models	
Framing	Orange (255,110,0)
Medical Supports	Brown (105,51,0)
General Equipment Clearances	Dark Red (139,0,0)

D. COMPUTER HARDWARE

Design and Construction Team members shall utilize computer hardware that is sufficient to efficiently handle single model files of up to 500MB and federated/combined models of up to 1.5GB.

E. COLLABORATION

During the Project BIM Execution Planning process, the Design and Construction Teams shall collaboratively define protocols and frequency for BIM file sharing, BIM coordination meetings, and model deliverables. PPS shall determine if any BIM coordination Design and Construction Team co-location shall be required for the project.

7. BIM FACILITY MAINTENANCE MODELS AND DATA

A. UPDATING DESIGN MODELS WITH "SIGNIFICANT" CHANGES

During construction, the Design Team shall maintain and update the Architectural Design Model(s) and Structural Design Model(s) with all "architecturally and structurally significant" changes made through RFIs, ASIs, Change Orders, etc. A good rule of thumb to determine whether a change is "significant" is that if the 3D geometry of the model changes, it will likely be deemed significant (PPS will be the final say on whether a change is significant or not). These Architectural and Structural Design Update Models shall be updated each time a significant change occurs and shall be submitted to the BIM IM after each update. Each submission shall include the full model(s) with all necessary objects and reference drawings. These model updating services shall be provided by the Design Team to PPS at no additional cost, except in the case of a change in which PPS adds scope.

Equipment in M/E/P/FP/LV models shall be updated during the construction shop drawing process once the Trade Contractor selects each specific piece of equipment. M/E/P/FP/LV models shall also be updated as necessary to produce drawings in response to RFIs, ASIs, Change Orders, etc. as required by Section 4G (Model Property and Parameter Data). Final revisions to M/E/P/FP/LV models shall be made according to the Record Modeling process defined in Section 7D (Design Team Record Models).

B. TRADE CONTRACTOR AS-BUILT MODELS

Within 31 calendar days of each Trade Contractor completing installation of their scope of work in any given area or level of the project (as defined by the Project BIMEP) or a duration mutually agreed to by PPS and the Contractor, Trade Contractors will update their Construction Models (used for shop drawings and fabrication) into As-Built Models. These As-Built Models shall capture all as-built differences between

Portland Public Schools is an equal opportunity educator and employer.

what was actually installed in the field and what was originally represented in the Construction Models, and shall contain final accurate PPS room numbers and PPS asset/equipment IDs. The General Contractor shall verify the accuracy of the Trade Contractor As-Built Models, and shall submit to PPS in writing that Trade Contractor As-Built Models accurately represent what was installed in the field within the tolerances defined in Section 4K (Model Accuracy and Tolerances).

For each asset within the Construction models Trade Contractors shall input property information (which shall correspond to the Asset Matrix provided by the General Contractor as defined in Section 7C) for asset type, asset name, asset equipment tag ID number, manufacturer, material (should already be in the model parametric data), size (should already be in the model parametric data), model number, and serial number.

As-Built Models shall be provided to the BIM IM and PPS for use by the Design Team by the 31st day, and shall include models in native file format, along with all necessary object enablers, as well as Federated As-Built Models in Navisworks nwf (targeting native files) and nwd file format. The General Contractor shall include a full description of how to assemble the Federated As-Built Model from each native As-Built Model.

C. ASSET MATRIX

Within 31 calendar days of completion of installation of each project asset or a duration mutually agreed upon by PPS and the General Contractor, the General Contractor shall provide the Design Team with an (updated) Asset Matrix for each asset on the project which shall include the following:

- Facility
- Room number (must be final PPS approved room number)
- Asset type
- Asset name
- Asset equipment tag ID number (must conform to PPS Equipment Class List)
- Manufacturer
- Manufacturer contact info (address, email, phone, website)
- Material
- Size
- Model number
- Serial number

PPS will specifically define assets requiring this data during the Project BIM Execution Planning process, and may include specialty items, M/E/P/FP/LV assets that require maintenance (VAVs, chillers etc.), M/E/P/FP/LV assets that are required for maintaining the building (valves, dampers etc.), and other project-specific assets.

The General Contractor shall link up to seven (7) electronic documents or data, as defined by PPS, to the Asset Matrix. These documents may include, but are not limited to, items such as submittals, operations and maintenance manuals, warranty information, cut sheets, manufacturer websites, commissioning reports, testing and balancing reports etc.

D. DESIGN TEAM RECORD MODELS

Within 31 calendar days of project substantial completion or a duration mutually agreed upon by PPS and the General Contractor, the Design Team shall submit to PPS the Record Models as follows:

- Architectural Record Models
    - The Architect shall use the final Trade Contractor As-Built Models, submitted per Section 7B (Trade Contractor As-Built Models), to determine if there are any differences in geometry between the models (not including differences due to the lower level of development of the Architect's models as compared to the Trade Contractor models). This can be done by

overlaying models in Navisworks, Revit, or other model merging software. If differences in the models exist, the Architect shall confirm that the as-built condition in the Trade Contractor model is accurately represented, and then revise the Architect's Revit model accordingly.

- The Architect shall create parameters for asset type, asset name, asset equipment tag ID number, manufacturer, material (should already be in the Revit parametric data), size (should already be in the Revit parametric data), model number, and serial number for each architectural asset within the Revit model, and shall input the asset data for each asset per the Asset Matrix provided by the General Contractor as defined in Section 7C (Asset Matrix).
- These final revised Revit models shall be the Architectural Record Models.

- Structural Record Models
  - The Structural Engineer shall use the final Trade Contractor As-Built Models, submitted per Section 7B (Trade Contractor As-Built Models), to determine if there are any differences in geometry between the models (not including differences due to the lower level of development of the Structural Engineer's models as compared to the Trade Contractor models). This can be done by overlaying models in Navisworks, Revit, or other model merging software. If differences in the models exist, the Structural Engineer shall confirm that the as-built condition in the Trade Contractor model is accurately represented, and then revise the Structural Engineer's Revit model accordingly.
  - These final revised Revit models shall be the Structural Record Models.

- M/E/P/FP/LV Record Models
  - The M/E/P/FP/LV Engineer shall use the final Trade Contractor As-Built Models, submitted per Section 7B (Trade Contractor As-Bullt Models), to determine if there are any differences in geometry between the models (not including differences due to the lower level of development of the M/E/P/FP/LV Engineer's models as compared to the Trade Contractor models). This can be done by overlaying models in Navisworks, Revit, or other model merging software. It is likely that there will be significant differences in the M/E/P/FP/LV Design Models as compared to the Trade Contractor As-Bullt models. In any case, all differences in geometry shall be revised in the Engineer's Revit models accordingly.
  - In the absence of an initial design model (ie. if, for instance, fire protection design was performed by the Trade Contractor or system hangers/supports), the M/E/P/FP/LV engineer shall use the Trade Contractor model to create an equivalent Revit model. Revit may not be able to provide a fabrication level of detail, but the model should be as accurate In size and location as the Trade Contractor model.
  - The M/E/P/FP/LV Engineer shall create parameters for asset type, asset name, asset equipment tag ID number, manufacturer, material (should already be in the Revit parametric data), size (should already be in the Revit parametric data), model number, and serial number for each architectural asset within the Revit model, and shall input the asset data for each asset per the Asset Matrix provided by the General Contractor as defined in Section 7C (Asset Matrix).
  - These final revised Revit models shall be the M/E/P/FP/LV Record Models.

- Federated Record Model
  - The Architect shall combine all Record Models into a single Federated Record Model using Navisworks.

- Record Model Files
  - Record Model formats: rvt, nwc, ifc (latest version)
  - Federated Record Model formats: nwf (targeting nwc files), nwd
  - Include all associated and linked files

- Include shared parameters Revit file
- Include full model(s) with all necessary objects and all reference drawings
- Include all necessary object enablers

- Record Model Utilization Instructions
  - The Architect shall include a full description of how to assemble the Federated Record Model from each native Record Model, including the Revit Model Matrix (see example at Attachment 2) as defined in Section 4H (Revit Model Matrix), along with final software and version numbers of all source files in the Federated Record Model.
  - The Architect shall provide a detailed set of instructions for extracting all 2D documentation from the Record (Revit) Models.

- Room Numbers
  - All As-Built Record Models shall contain accurate room numbers according to final PPS-approved room names.

E. Closeout

As a part of the Closeout process and notwithstanding other requirements of this standard or the requirement of the project specifications, the following deliverables shall be provided to PPS.

- Composite record model – dimensionally accurate in accordance tolerances (.nwd and .dwf)
- Coordination models in native file format and .IFC
- Record documents (bound .dwg format)
- Electronic field sets (linked .pdf format including page navigation links)
- O&M manuals (.pdf format)

F. Record Drawings

Record Drawings shall be produced directly from the Record Models described in 7D and thus should be an accurate representation of as-built conditions. All Record Drawings shall contain accurate room numbers according to final PPS-approved room names.

8. Ownership of Models and Liability

A. Ownership and Rights of Data

PPS shall have ownership and corresponding rights to all project data, including Building Information Models, CAD files, drawings, documents, and any other data developed for any PPS project, per the terms of the PPS Master Agreement.

B. Liability for Models – Contractual Language

The Design and Construction Teams represent that the dimensions in their Models are accurate to the extent that this BIM Guidelines specifies. Building Information Models are not considered Contract Drawings, therefore all dimensions must be verified with the Contract Drawings, and if ever there is a discrepancy the Contract Drawings will take precedence over the Models.

Design Models are Intended to provide only the level of detail specified in the Project BIMEP, and therefore any material or object quantities extracted from Design Models by the Construction Team are not guaranteed to be accurate.

Nothing in this BIM Guidelines document shall supersede or replace the standard of care required in the PPS Agreement with either the Architect or General Contractor.

Each Party waives claims against the other Parties to the Governing Contract for consequential damages arising out of or relating to the use of or access to a Model, including but not limited to damages for loss of use of the Project, rental expenses, loss of income or profit, costs of financing, loss of business, principal office overhead and expenses, loss of reputation or insolvency.

Portland Public Schools is an equal opportunity educator and employer.

APPENDIX – GLOSSARY OF TERMS

4D Schedule
4D = 3D + schedule (time). 4D schedules are created in various software programs by linking a 3D model to a project schedule, allowing a 3D time-based visual animation of the progression of the project schedule.

5D Quantity Verification
5D = 3D + cost information. Building Information Models allow automated quantity extraction due to the fact that model elements are parametric and information rich. 5D quantity verification is the process of utilizing model extracted quantities to verify traditional take-off quantities in a cost estimate.

5D Cost Estimating
5D = 3D + cost information. Building Information Models allow automated quantity extraction due to the fact that model elements are parametric and information rich. 5D cost estimates are created by linking model generated quantities to a cost database to produce a cost estimate.

As-Built Model
A Contractor model that accurately represents as-constructed building elements.

Asset Matrix
A spreadsheet or database containing information related to project assets and equipment.

BIM
Building Information Model / Modeling (BIM). A three-dimensional (3D) information-rich digital representation of the physical and functional characteristics of a facility; a shared knowledge resource for information about a facility, forming a reliable basis for decisions during its life-cycle. The term BIM may be used as a noun to describe a single model or multiple models used in the aggregate. The term BIM may also be used as a verb in the context of Building Information Modeling, the process of creating, modifying, and maintaining the model.

CAFM
Computer-Aided Facility Maintenance (CAFM). A software package that supports facility management. CAFM software may have modules that can be utilized for space management, asset management, real estate portfolio administration, lease administration, move management, project management, facility maintenance, and sustainability. CAFM programs are closely related to CMMS programs, and some people use the terms interchangeably.

CMMS
Computerized Maintenance Management System. A software package that maintains a computer database of information about an organization's maintenance operations. This information is intended to help maintenance workers do their jobs more effectively (for example, determining which machines require maintenance and which storerooms contain the spare parts they need) and to help management make informed decisions (for example, calculating the cost of machine breakdown repair versus preventive maintenance for each machine, possibly leading to better allocation of resources). CMMS data may also be used to verify regulatory compliance. CMMS programs are closely related to CAFM programs, and some people use the terms interchangeably.

Combined Coordination Model
An aggregate model comprised of more than one construction model (ie. structural steel, mechanical ductwork plumbing, electrical, etc.) that is created for the purpose of spatially coordinating building elements.

Communication Systems
Communication systems include all building components that service voice and/or data conveyance such as voice-over-IP systems, intercom, network time-keeping and data systems.

DWG
An Autodesk file format for 2D and 3D AutoCAD based files.

Enriched Record Model
A record model to which additional operations and maintenance-related electronic documentation has been added.

Federated Record Model
An aggregate model comprised of more than one Architect or Engineer record model that is created for record purposes.

LOD
Level of Development (LOD). Levels of model development include the following levels:

- 100 – Schematic Design; overall building massing; whole building analysis (volume, orientation, square footage costs)
- 200 – Design Development; generalized systems/assemblies (approximate quantities, size, shape, location, orientation); selected system performance analysis
- 300 – Construction Documentation; generation of traditional CDs; analysis and simulation of detailed elements/systems; includes attributes and parameters defined by Owner
- 400 – Construction Administration / Shop Drawings; includes specific assemblies which are accurate in terms of quantity, size, shape, location, and orientation; virtual representations of the proposed elements, suitable for construction, fabrication, and assembly
- 500 – Project Completion / Record Drawings / As-Built Conditions; model is configured to be the central data storage for integration into the building maintenance and operations systems; includes completed parameters and attributes as specified by Owner.

Although people often refer to LOD as "level of detail", "detail" is a misnomer. A model may have a significant amount of geometry detail, and yet be very conceptual as it relates to the maturity of design intent. Level of development addresses both the required level of model detail as well as the maturity of the design, or how close to a finalize design that component of the model is.

MDPS
Model Definition and Progression Specification (MDPS). The MDPS is also know as a Model Element Table in the AIA E202 document, and is a matrix that defines specific model elements by uniformat classification and their required Level of Development and model component author for that stage of the project.

Navisworks
An Autodesk software program that can be used to combine almost any model of any file type, navigate models, perform clash detection, and link models to project schedules (4D).

M/E/P/FP/LV
Mechanical, electrical, plumbing, and fire protection.

Parametric

Portland Public Schools is an equal opportunity educator and employer.

An element that is defined by parameters such as size, material, type etc. If the object's parameters are changed, the object automatically changes to represent the new parameters.

Project BIM Execution Plan (BIMEP)
A document created, based on and in conformance with the Owner's BIM Guidelines, that defines how the BIM requirements will be executed based on that specific project.

Record Model
An Architect or Engineer model that captures significant changes to the architectural, structural, or M/E/P/FP/LV building elements based on RFIs, ASIs, change orders, and as-constructed information.

Revit
An Autodesk software tool for designers. The software allows users to produce Building Information Models, corresponding 2D drawings, which are "snapshots" of the model, and access the building information from a model database.

Revit Family
The parametric Revit objects used to create building elements such as walls, doors, windows etc.

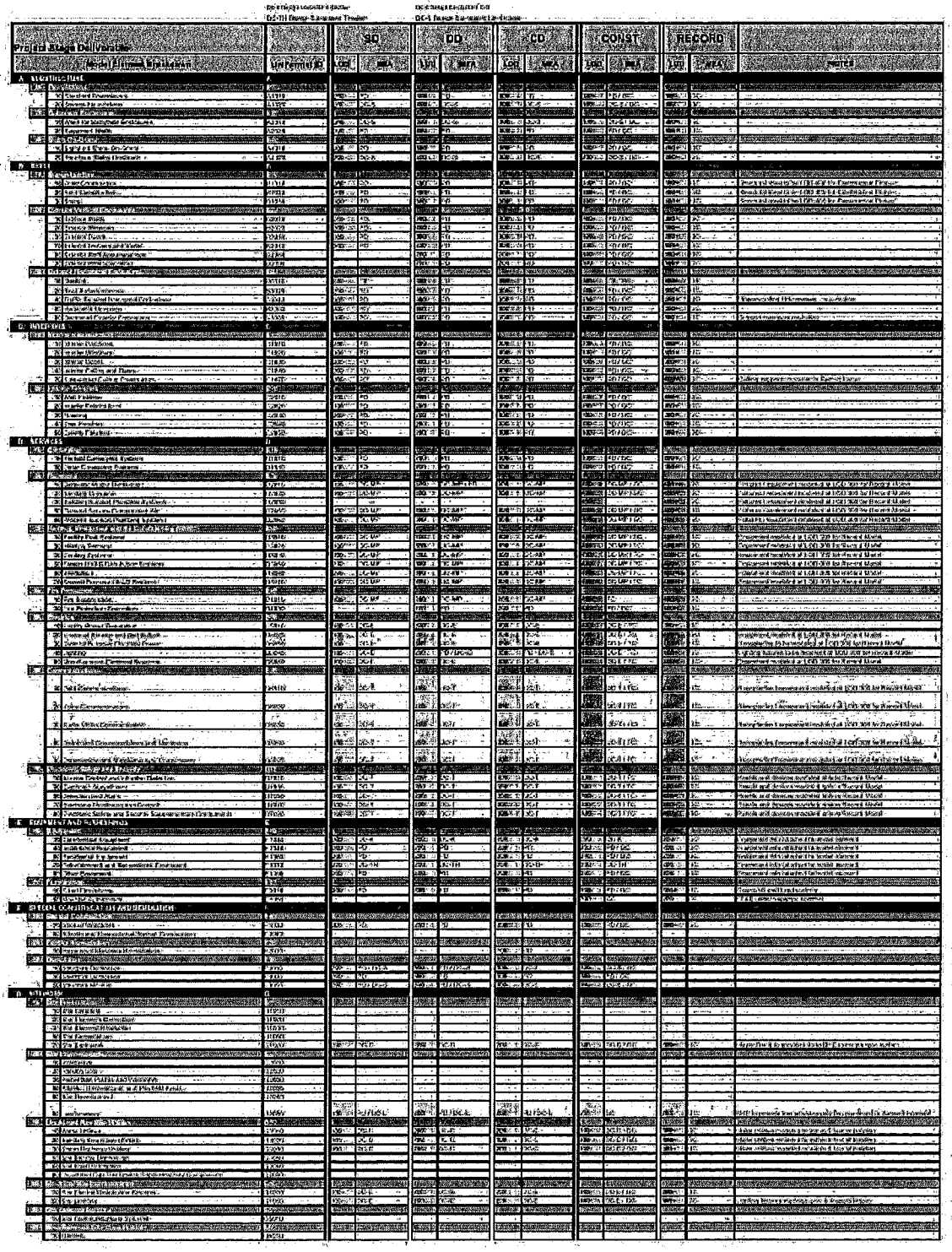
Solibri
A rules-based software tool that analyzes Building Information Models for things such as code compliance, data integrity, material quantities, and clashes.

SD, DD, CD
Schematic Design (SD), Design Development (DD), Construction Documentation (CD). Traditional stages of the development of the building design.

Z-Dimension
The third dimension of a model, adding height to an object / model, assuming the X-dimension is length and the Y-dimension is width.

ATTACHMENT 1 – LOD MATRIX

LEVEL OF DEVELOPMENT (LOD) MATRIX



SCHEDULE OF VALUES

PP5 PROJECT #: GH5MOD
CONTRACTOR: FILL IN NAME HERE
PROJECT: **Grant High School**

Application #: #
Period to: ddfmmfyyyy
GC Project # ###

A	B	C	D	E	F	G	H	I	J	K
Item #		Description of Work		Scheduled Value	Work Completed: From Previous Application (I)	Work Completed: This Period	Materials Presently Stored (Not in G)	Total Completed & Stored to Date (F+G+H)	% Complete (I/E)	Balance to Finish (not inc. Retention) (E-I)
1				$ 1.00				$ -	0.0%	$ 1.00
2				$ 2.00	$ 0.10			$ 0.10	5.0%	$ 1.90
3				$ 3.00	$ 0.20	$ 0.10		$ 0.30	10.0%	$ 2.70
4				$ 4.00	$ 0.30	$ 0.20	$ 0.10	$ 0.60	15.0%	$ 3.40
5				$ 5.00	$ 0.40	$ 0.30	$ 0.20	$ 0.90	18.0%	$ 4.10
6				$ 6.00	$ 0.50	$ 0.40	$ 0.30	$ 1.20	20.0%	$ 4.80
7				$ 7.00	$ 0.60	$ 0.50	$ 0.40	$ 1.50	21.4%	$ 5.50
8				$ 8.00	$ 0.70	$ 0.60	$ 0.50	$ 1.80	22.5%	$ 6.20
9				$ 9.00	$ 0.80	$ 0.70	$ 0.60	$ 2.10	23.3%	$ 6.90
10				$ 10.00	$ 0.90	$ 0.80	$ 0.70	$ 2.40	24.0%	$ 7.60
11				$ 11.00	$ 1.00	$ 0.90	$ 0.80	$ 2.70	24.5%	$ 8.30
12				$ 12.00	$ 1.10	$ 1.00	$ 0.90	$ 3.00	25.0%	$ 9.00
13				$ 13.00	$ 1.20	$ 1.10	$ 1.00	$ 3.30	25.4%	$ 9.70
14				$ 14.00	$ 1.30	$ 1.20	$ 1.10	$ 3.60	25.7%	$ 10.40
15				$ 15.00	$ 1.40	$ 1.30	$ 1.20	$ 3.90	26.0%	$ 11.10
16				$ 16.00	$ 1.50	$ 1.40	$ 1.30	$ 4.20	26.3%	$ 11.80
17				$ 17.00	$ 1.60	$ 1.50	$ 1.40	$ 4.50	26.5%	$ 12.50
18				$ 18.00	$ 1.70	$ 1.60	$ 1.50	$ 4.80	26.7%	$ 13.20
19				$ 18.00	$ 1.70	$ 1.60	$ 1.50	$ 4.80	26.7%	$ 13.20
20				$ 18.00	$ 1.70	$ 1.60	$ 1.50	$ 4.80	26.7%	$ 13.20
21				$ 1.00				$ -	0.0%	$ 1.00
22				$ 2.00	$ 0.10			$ 0.10	5.0%	$ 1.90
23				$ 3.00	$ 0.20	$ 0.10		$ 0.30	10.0%	$ 2.70
24				$ 4.00	$ 0.30	$ 0.20	$ 0.10	$ 0.60	15.0%	$ 3.40
25				$ 5.00	$ 0.40	$ 0.30	$ 0.20	$ 0.90	18.0%	$ 4.10
26				$ 6.00	$ 0.50	$ 0.40	$ 0.30	$ 1.20	20.0%	$ 4.80
27				$ 7.00	$ 0.60	$ 0.50	$ 0.40	$ 1.50	21.4%	$ 5.50
28				$ 8.00	$ 0.70	$ 0.60	$ 0.50	$ 1.80	22.5%	$ 6.20
29				$ 9.00	$ 0.80	$ 0.70	$ 0.60	$ 2.10	23.3%	$ 6.90
30				$ 10.00	$ 0.90	$ 0.80	$ 0.70	$ 2.40	24.0%	$ 7.60
31				$ 11.00	$ 1.00	$ 0.90	$ 0.80	$ 2.70	24.5%	$ 8.30
32				$ 12.00	$ 1.10	$ 1.00	$ 0.90	$ 3.00	25.0%	$ 9.00
33				$ 13.00	$ 1.20	$ 1.10	$ 1.00	$ 3.30	25.4%	$ 9.70
34				$ 14.00	$ 1.30	$ 1.20	$ 1.10	$ 3.60	25.7%	$ 10.40
35				$ 15.00	$ 1.40	$ 1.30	$ 1.20	$ 3.90	26.0%	$ 11.10
36				$ 16.00	$ 1.50	$ 1.40	$ 1.30	$ 4.20	26.3%	$ 11.80
37				$ 17.00	$ 1.60	$ 1.50	$ 1.40	$ 4.50	26.5%	$ 12.50
38				$ 18.00	$ 1.70	$ 1.60	$ 1.50	$ 4.80	26.7%	$ 13.20
39										
40		**SOV SUBTOTAL**		**$ 378.00**	**$ 34.00**	**$ 30.40**	**$ 27.00**	**$ 91.40**	**24.2%**	**$ 286.60**

OWNER CHANGE ORDERS

PP5 PROJECT #: GH5MOD
CONTRACTOR: FILL IN NAME HERE
PROJECT: **Grant High School**

Application #: #
Period to: ddfmmfyyyy
GC Project # ###

A	B	C	D	E	F	G	H	I	J	K
Item #	CR#	Description of Work		Scheduled Value	Work Completed: From Previous Application (I)	Work Completed: This Period	Materials Presently Stored (Not in G)	Total Completed & Stored to Date (F+G+H)	% Complete (I/E)	Balance to Finish (not inc. Retention) (E-I)
41	1	RFI #001 – Relocate drain field.		$ 2.00	$ 0.10	$ 0.20	$ 0.50	$ 0.80	40.0%	$ 1.20
42								$ –	#DIV/0!	$ –
43								$ –	#DIV/0!	$ –
44								$ –	#DIV/0!	$ –
45								$ –	#DIV/0!	$ –
46								$ –	#DIV/0!	$ –
47								$ –	#DIV/0!	$ –
48								$ –	#DIV/0!	$ –
49								$ –	#DIV/0!	$ –
50								$ –	#DIV/0!	$ –
51								$ –	#DIV/0!	$ –
52								$ –	#DIV/0!	$ –
53								$ –	#DIV/0!	$ –
54								$ –	#DIV/0!	$ –
55								$ –	#DIV/0!	$ –
56								$ –	#DIV/0!	$ –
57								$ –	#DIV/0!	$ –
58								$ –	#DIV/0!	$ –
59								$ –	#DIV/0!	$ –
60								$ –	#DIV/0!	$ –
61								$ –	#DIV/0!	$ –
62								$ –	#DIV/0!	$ –
63								$ –	#DIV/0!	$ –
64								$ –	#DIV/0!	$ –
65								$ –	#DIV/0!	$ –
66								$ –	#DIV/0!	$ –
67								$ –	#DIV/0!	$ –
68								$ –	#DIV/0!	$ –
69								$ –	#DIV/0!	$ –
70								$ –	#DIV/0!	$ –
71								$ –	#DIV/0!	$ –
72								$ –	#DIV/0!	$ –
73								$ –	#DIV/0!	$ –
74								$ –	#DIV/0!	$ –
75								$ –	#DIV/0!	$ –
76								$ –	#DIV/0!	$ –
77										
78		**OCO SUBTOTALS**		$ -	$ -	$ -	$ -	$ -	**#DIV/0!**	$ -
79										
80		**TOTALS (SOV + OCO'S)**		**$ 378.00**	**$ 34.00**	**$ 30.40**	**$ 27.00**	**$ 91.40**	**24.2%**	**$ 286.60**

ATTACHMENT 2 – CLASH/CLEARANCE DETECTION MATRIX

EXHIBIT Q

Portland Public Schools

Prime Contractor, (CM/GC) **Conditional Waiver** and Release Upon **Progress Payment**

The undersigned CM/GC, upon receipt of a check in the sum of _____ Dollars ($_____) payable to CM/GC, and when the check has been properly endorsed and has been paid by the bank upon which it is drawn, hereby waives and releases any stop notice and any and all claims CM/GC has with respect to it Work on the , ("Project") under and related to its prime contract for the Project with Portland Public Schools, ("District") dated _____ ___, 201_, to the following extent. This waiver and release is effective as to a progress payment for labor, services, overhead, materials, and equipment furnished and any and all other claims by the CM/GC and its subcontractors and suppliers at all tiers during the period commencing on and including _____, 201_ and ending and including _____, 201_, excluding retainage. This document may be relied upon by the Agency, and principal and surety on a bond, and any lender providing financing for the Project; provided that any party intending to rely upon this document should first verify evidence of payment to the CM/GC of the full amount set out above.

Date:_____ CM/GC _____

By: _____ (signature)

Name: _____ (printed or typed)
Title:

Prime Contractor, (CM/GC) **Unconditional Waiver** and Release Upon **Progress Payment**

The undersigned CM/GC, has received the sum of _____ Dollars ($_____) payable to CM/GC, and hereby waives and releases any stop notice and any and all claims CM/GC has with respect to it Work on the , ("Project") under and related to its prime contract with the District for the Project dated _____ ___, 201_, to the following extent. This waiver and release is effective as to a progress payment for labor, services, overhead, materials, and equipment furnished and any and all other claims by the CM/GC and its subcontractors and suppliers at all tiers during the period prior to and including _____, 201_ , excluding retainage. This document may be relied upon by the Agency, and principal and surety on a bond, and any lender providing financing for the Project; provided that any party intending to rely upon this document should first verify evidence of payment to the CM/GC of the full amount set out above.

Date:_____ CM/GC _____

By: _____ (signature)

Name: _____ (printed or typed)
Title:

EXHIBIT N – DISTRICT MILESTONE SCHEDULE

Significant Milestone Activity Name	Start	Finish
Master Planning	1/1/2016	12/18/18
Schematic Design	12/18/18	8/19/19
Design Development	8/20/19	7/6/20
Construction Documents	7/7/20	6/21/21
GMP Approval	1/1/21	3/31/21
Construction	6/15/21	6/15/24
Substantial Completion	6/15/24	6/15/24
Owner Move In	6/16/24	8/16/24

EXHIBIT S

APPLICATION AND CERTIFICATE FOR PAYMENT

To DISTRICT:	Attn: Christine Gartland PPS	PPS PROJECT #:	GHSMOD	Application #:	#	Distribution to:
	S01 N Dixon Street			Period to:	ddfmmfyyyy	x E-builder
	Portland, OR 97227			GC Project #:	###	
From CONTRACTOR:	FILL IN NAME HERE	ARCHITECT:	Mahlum Architects	Contract Date:	ddfmmfyyyy	
CONTRACTOR ADDRESS:	FILL IN ADDRESS HERE					
CONTRACT for:	Grant High School					

CONTRACTOR'S APPLICATION FOR PAYMENT

Application is made for payment, as shown below, in connection with the Contract.
Schedule of Values is attached.

1. ORIGINAL CONTRACT SUM	$ 378.00	
2. TOTAL CHANGE ORDERS TO DATE	$ 0.00	
3. CONTRACT SUM TO DATE (Line 1 + Line 2)	$ 378.00	
4. TOTAL COMPLETED & STORED TO DATE (Column I on the Schedule of Values)	$ 91.40	
5. RETAINAGE:		
a. Retainage on Completed Work (5% of Line 4)	$ 4.57	
b. Retainage Released (Previously) (Key-In Line 5b + Sc from Previous Application)	$ 1.00	
c. Retainage Released (Current Application) (Key-In)	$ 2.00	
d. Total Retainage Released to Date (Line 5b + 5c)	$ 3.00	66%
e. Total Retained (Including this Application) (Line Sa - 5d)	$ 1.57	
6. TOTAL EARNED LESS RETAINAGE (Line 4 - Line 5e)	$ 89.83	
7. LESS PREVIOUS CERTIFICATES FOR PAYMENT (Key-In Line 6 from Previous Application)	$ 21.55	
8. CURRENT PAYMENT DUE (Line 6 - Line 7)	$ 68.28	
9. BALANCE TO FINISH, INCLUDING RETAINAGE (Line 3 - Line 6)	$ 288.17	

The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief, the Work covered by this Application for Payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the District, and that current payment shown therin is now due.

CONTRACTOR:

By: _____ Date: _____

State of: Oregon

County of: The United States of America

Subscribed and sworn to before me this: _____ day of _____

Notary Public: _____

Commission expires: _____

CERTIFICATE FOR PAYMENT

In accordance with Contract Documents, based on on-site observations and the data comprising application, the Architect certifes to the District that to the best of the Architect's knowledge, information and belief, the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment of the AMOUNT CERTIFIED.

AMOUNT CERTIFIED $ _____

(Attach explaination if amount certified differs from the amount applied for. Initial all figures on this application and on the Schedule of Values that are changed to conform to the amount certified.)

ARCHITECT:

By: _____ Date: _____

This Certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner of Contractor under this Contract.

ACCEPTED FOR PAYMENT

Project Manager: _____ Date: _____

ATTACHMENT H
Portland Public Schools
Career Learning Requirements

A. **Registration on PPS Partner Connect**

1) The Contractor is required to register on the District's Career Learning database tool, PPS Partner Connect, which is located at https://www.pps.net/partnerconnect
   - When registering, the Contractor must follow the detailed instructions attached.

2) The Contractor must offer Career Learning opportunities as follows:

   a) If this contract has a value between $100,000 and $1,000,000, Contractor must:
      - Register with PPS Partner Connect and offer at least two Career Learning opportunities to PPS students. For contracts lasting longer than one year, the Contractor must offer at least two opportunities every year during the active term of the contract.

   b) If this contract has a value greater than $1,000,000, Contractor must:
      - Register with PPS Partner Connect and offer at least four Career Learning opportunities to PPS students. For contracts lasting longer than one year, Contractors must offer at least four opportunities every year during the active term of the contract; and
      - Register to participate as an exhibitor in the Portland Workforce Alliance's annual Northwest Youth Careers Expo every year during the active term of the contract. Follow the detailed registration instructions attached. (If Contractor is unable to participate as an exhibitor, Contractor must register to participate as a sponsor at an equivalent level.)

B. **Program Administration**

1) Contractors will report registration with PPS Partner Connect to the District prior to contract execution:
   - Contractors must submit the registration confirmation email or similar proof of registration to the District with its signed contract.

2) Contractors will receive requests from District Career Coordinators to provide Career Learning opportunities to PPS students.

3) Contractors will coordinate with the District's Career Coordinators to plan, schedule, and conduct the Career Learning events or activities.

4) Career Coordinators will coordinate student participation before and during scheduled events and activities.

Please send any questions about these Career Learning Requirements to careerpath@pps.net

PORTLAND PUBLIC SCHOOLS | CAREER AND TECHNICAL EDUCATION

PPS PARTNER CONNECT— CONNECTING PARTNERS AND PPS STUDENTS

PPS Partner Connect is our new web-based tool which makes it easy for parents, alumni and industry professionals to connect with K-12 educators. Professionals can share their skills and expertise to bring real-world, authentic learning opportunities to all our students helping to create the next generation of innovators. Through in-person matches and virtual sessions, professionals can help students and teachers connect their classroom experiences to the world of work. ***Together we can make a difference.***

Students need context for what they are learning in the classroom. *PPS Partner Connect can help match your expertise and insight to connect with the schools and students in your community. This easy-to-use tool enables educators to match student-learning needs with professionals whose skills fit their request.*

Benefits to professionals and employers:

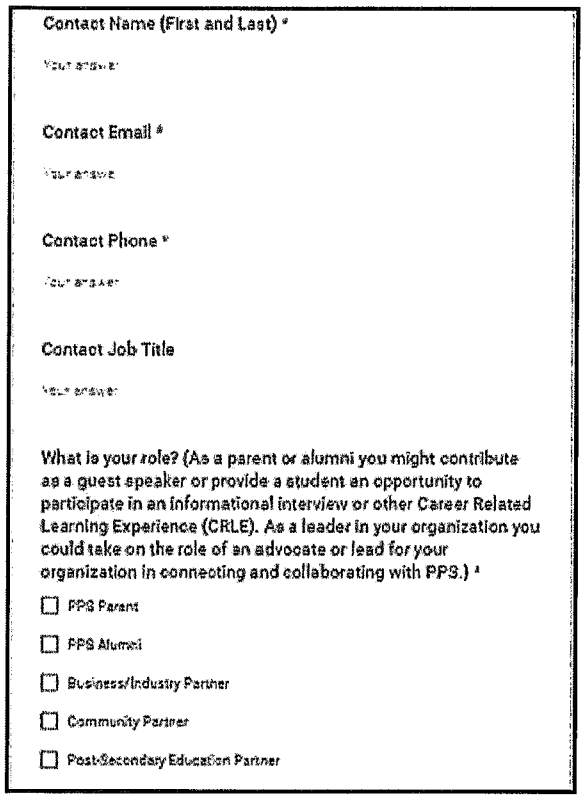
- Provides meaningful ways to engage in education
- Connects professionals with educators based on their skills, volunteer interests, and location
- Exposes future workforce to career opportunities
- Allows companies to centralize and scale education outreach
- Tracks employee engagement based on a variety of metrics and generates reports
- Enhances employee engagement and achieves corporate responsibility goals
- Demonstrates your commitment to your community through volunteering

How it works:

- Community members and professionals register and set up a profile at https://www.pps.net/partnerconnect
- Career Coordinators create a request based on a topic or activity at their school that can benefit from an industry connection.
- PPS Partner Connect enables high school Career Coordinators to match the skills of industry professional(s) with requests and helps mediate the process of connecting them to the right classroom and students.
- Career Coordinators coordinate with professionals who can choose to accept matches and connect in-person or virtually to share expertise.

ENGAGE— PREPARE — INSPIRE

The District is committed to equal opportunity and nondiscrimination in all its educational and employment activities. The District prohibits discrimination based on race; national or ethnic origin; color; sex; religion; age; sexual orientation; gender expression or identity; pregnancy; marital status; familial status; economic status or source of income; mental or physical disability or perceived disability; or military service.



Contact Name (First and Last) *

Your answer

Contact Email *

Your answer

Contact Phone *

Your answer

Contact Job Title

Your answer

What is your role? (As a parent or alumni you might contribute as a guest speaker or provide a student an opportunity to participate in an informational interview or other Career Related Learning Experience (CRLE). As a leader in your organization you could take on the role of an advocate or lead for your organization in connecting and collaborating with PPS.) *

- ☐ PPS Parent
- ☐ PPS Alumni
- ☐ Business/Industry Partner
- ☐ Community Partner
- ☐ Post-Secondary Education Partner

PPS Partner Connect Guide

STEP 1 -

1. Go to PPS Partner Connect https://www.pps.net/partnerconnect and complete the Partner Intake Survey
2. Complete your Profile Information:

a. Please provide your first and last name, the best e-mail to contact you, and best contact phone number.

b. Please select your role: (Check all that apply)

- ❖ PPS Parent - The parent of a student or students
- ❖ PPS Alumni - Those who have graduated from a PPS school.
- ❖ Business/Industry Partner - Those working in the business/industry sector including those who have a contract with PPS.
- ❖ Community Partner - Community-based pro-grams and organizations providing direct or indlrect support to our schools and students.
- ❖ Post-Secondary Education Partner - Apprentice & trade organizations, community colleges, other Higher-Ed institutions
- ❖ Volunteer - Those who wish to volunteer or are currently volunteering with PPS

STEP 1 (Cont.)

3. If you are submitting on behalf of a company or organization:
   a. Please provide your company/organization name.
   b. Please select a type that best matches your company/organization.

Company/Organization Name (Preferred information though not required if submitting as an Alumni or Parent)

Your answer

Company/Organization Type (Preferred Information though not required if submitting as an Alumni or Parent)

- ○ Business/Industry
- ○ Post-Secondary
- ○ Non-Profit
- ○ Government
- ○ Community Based Organization
- ○ Business Association
- ○ Other:

STEP 2 -

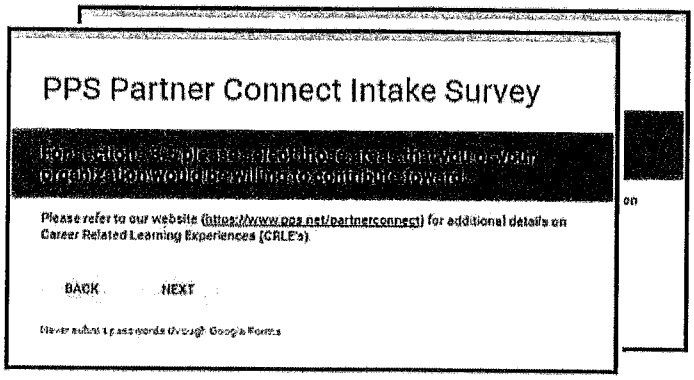
If your company is certified as a MBE, WBE, ESB, SDVBE, and/or DBE, please mark all that apply. If this does not apply, please mark N/A.

Is your company certified as a Minority Business Enterprise (MBE), a Women Business Enterprise (WBE), an Emerging Small Business (ESB), a Service-Disabled Veteran Business Enterprise (SDVBE), or a Disadvantaged Business Enterprise (DBE)? Check all that apply.

- ☐ MBE
- ☐ WBE
- ☐ ESB
- ☐ SDVBE
- ☐ DBE
- ☐ N/A (Not Applicable)

Career Related Learning Experiences are structured student activities that connect academic content and career-related learning to real life applications. In PPS we've broken them out into three tiers:

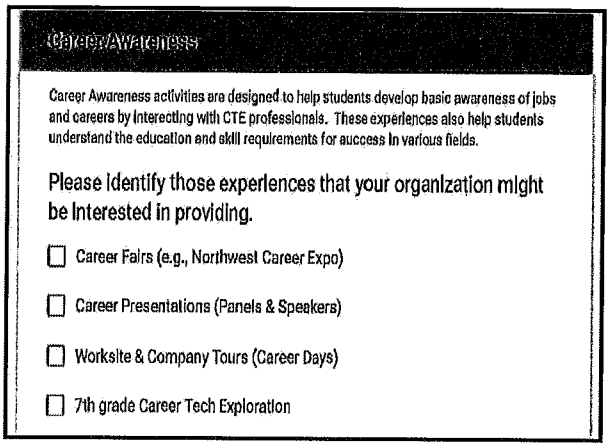
1. Career Awareness (primarily grades 7-9)
2. Career Exploration (primarily grades 9-11)
3. Career Preparedness (primarily grades 11-12)


PPS Partner Connect Intake Survey

Please refer to our website (https://www.pps.net/partnerconnect) for additional details on Career Related Learning Experiences (CRLE's).

BACK NEXT

Never submit passwords through Google Forms.


Career Awareness

Career Awareness activities are designed to help students develop basic awareness of jobs and careers by interacting with CTE professionals. These experiences also help students understand the education and skill requirements for success in various fields.

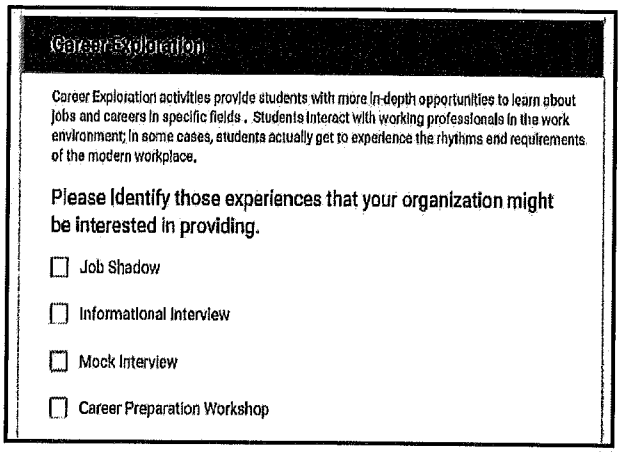
Please identify those experiences that your organization might be interested in providing.

- ☐ Career Fairs (e.g., Northwest Career Expo)
- ☐ Career Presentations (Panels & Speakers)
- ☐ Worksite & Company Tours (Career Days)
- ☐ 7th grade Career Tech Exploration

STEP 3-

Career Awareness activities are designed to help students develop basic awareness of jobs and careers by interacting with CTE professionals. These experiences also help students understand the education and skill requirements for success in various fields.

Please select the experiences that you are interested in providing.


Career Exploration

Career Exploration activities provide students with more in-depth opportunities to learn about jobs and careers in specific fields. Students interact with working professionals in the work environment; in some cases, students actually get to experience the rhythms and requirements of the modern workplace.

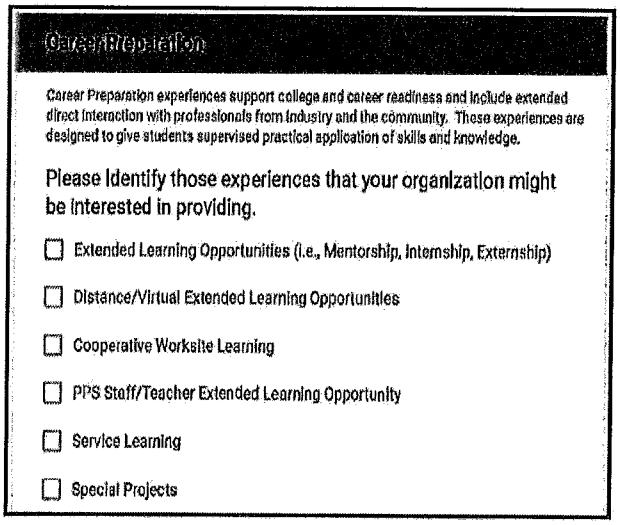
Please identify those experiences that your organization might be interested in providing.

- ☐ Job Shadow
- ☐ Informational Interview
- ☐ Mock Interview
- ☐ Career Preparation Workshop

STEP 4 -

Career Exploration activities provide students with more in-depth opportunities to learn about jobs and careers in specific fields. Students interact with working professionals in the work environment; in some cases, students actually get to experience the rhythms and requirements of the modern workplace.

Please select the experiences that you are interested in providing.


Career Preparation

Career Preparation experiences support college and career readiness and include extended direct interaction with professionals from industry and the community. These experiences are designed to give students supervised practical application of skills and knowledge.

Please identify those experiences that your organization might be interested in providing.

- ☐ Extended Learning Opportunities (i.e., Mentorship, Internship, Externship)
- ☐ Distance/Virtual Extended Learning Opportunities
- ☐ Cooperative Worksite Learning
- ☐ PPS Staff/Teacher Extended Learning Opportunity
- ☐ Service Learning
- ☐ Special Projects

STEP 5 -

Career Preparation experiences support college and career readiness and include extended direct interaction with professionals from industry and the community. These experiences are designed to give students supervised practical application of skills and knowledge.

Please select the experiences you are interested in providing.

STEP 6 -

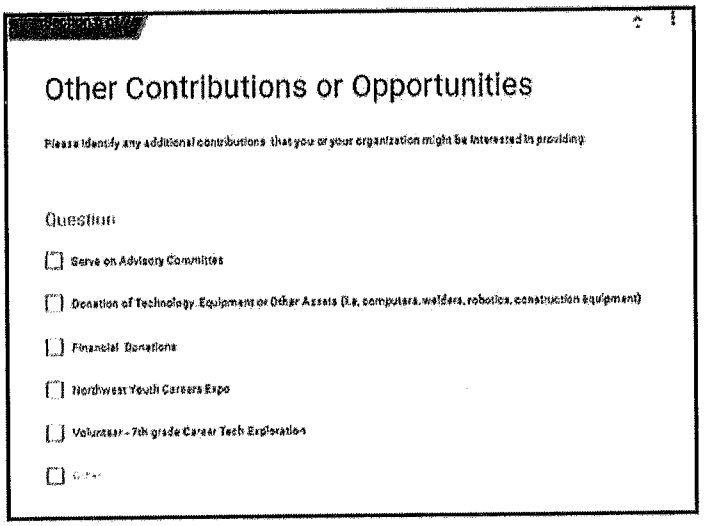
Please select the additional contributions or opportunities you would be interested in.

If you are interested in volunteering, please select "Volunteer." (e.g., guest speaker, field trips, classroom help, 7th grade Career Tech Exploration)

Examples of technology and equipment donations could include welding machines and materials, robots, construction tools, 3D printers, or possibly computers that would meet program recommendations.

PPS CTE Advisory Committees provide assistance to and promote the development of Career and Technical Education Programs to meet the needs of students, teachers, business and industry, and the community.

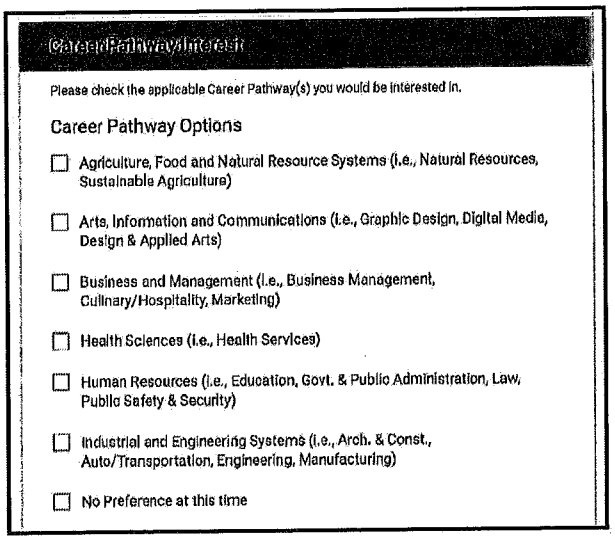
For more information on the NW Youth Careers Expo, please visit
http://www.portlandworkforcealliance.org/.


Other Contributions or Opportunities

Please identify any additional contributions that you or your organization might be interested in providing

Question

- [ ] Serve on Advisory Committee
- [ ] Donation of Technology Equipment or Other Assets (i.e. computers, welders, robotics, construction equipment)
- [ ] Financial Donations
- [ ] Northwest Youth Careers Expo
- [ ] Volunteer - 7th grade Career Tech Exploration
- [ ] Other


Career Pathway Interest

Please check the applicable Career Pathway(s) you would be interested in.

Career Pathway Options

- [ ] Agriculture, Food and Natural Resource Systems (i.e., Natural Resources, Sustainable Agriculture)
- [ ] Arts, Information and Communications (i.e., Graphic Design, Digital Media, Design & Applied Arts)
- [ ] Business and Management (i.e., Business Management, Culinary/Hospitality, Marketing)
- [ ] Health Sciences (i.e., Health Services)
- [ ] Human Resources (i.e., Education, Govt. & Public Administration, Law, Public Safety & Security)
- [ ] Industrial and Engineering Systems (i.e., Arch. & Const., Auto/Transportation, Engineering, Manufacturing)
- [ ] No Preference at this time

STEP 7 -

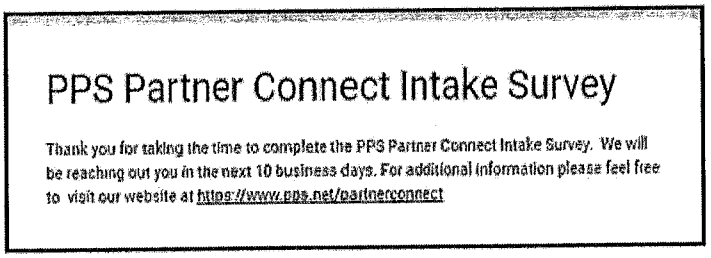
Please select the Career Pathway Options that are applicable to your interest(s). For more in-depth descriptions of the Career Pathway, please visit https://pps.net/pathways.

Final Step -

Thank you for completing our surveyl You will receive an auto reply email once you have submitted the form. If for some reason your do not receive an email, please email careerpath@pps.net and we will follow-up with you.

For additional information please visit:

https://www.pps.net/partnerconnect


PPS Partner Connect Intake Survey

Thank you for taking the time to complete the PPS Partner Connect Intake Survey. We will be reaching out you in the next 10 business days. For additional information please feel free to visit our website at https://www.pps.net/partnerconnect

NORTHWEST YOUTH CAREERS EXPO

Sponsor & Exhibitor Information

About the NW Youth Careers Expo

The annual NW Youth Careers Expo, hosted by the nonprofit Portland Workforce Alliance, is the state's largest career education experience for high school students. It shows students the region's amazing diversity of career opportunities, as well as the skills and education needed for those jobs.

The Expo's goals are to connect employers to their future workforce and help students make informed, inspired decisions about their education after high school – whether they choose a four-year university, community college or apprenticeship training center. The Expo grows every year, attracting many thousands of students and more than 100 of the region's top employers and postsecondary partners.

Expo sponsor and exhibitor opportunities

Become a sponsor: Generous sponsors make the Expo possible. Sponsors also invest in the year-round work of PWA, supporting high school students and the region's future workforce.

How your sponsorship helps: Your sponsorship helps pay for Expo costs. Our expenses include facility rental, booths, personnel and the PWA Breakfast. Our expense budget also includes significant funds to help high schools cover the costs of student transportation and substitute teachers.

Become an exhibitor: Join the region's leading businesses and organizations in telling students about career opportunities. Our exhibitors include top employers from every major sector, such as health care, business, technology, advanced manufacturing, construction, clean energy, government and the creative industries. They also include colleges and other postsecondary partners.

Registration is easy

Become a sponsor: Go to www.portlandworkforcealliance.org/expo and click on "Sponsor the Expo." Register online or use the printable form.

Become an exhibitor: Go to www.portlandworkforcealliance.org/expo and click on "Become an exhibitor." Register online or use the printable form.

Questions? Want to learn more?

PWA works with employers to offer career-learning experiences for students year-round, including career days, mentorship programs, internships, mock interviews and classroom presentations.
Visit PWA's "Contact us" page at http://www.portlandworkforcealliance.org/

Big dreams. Good jobs. All students.

ATTACHMENT I

BUILDING PORTLAND BUSINESS
SOCIAL EQUITY CONTRACTING

WORKFORCE TRAINING & HIRING PROGRAM
Contractor Checklist

This program applies to projects estimated at $200,000 or more and subcontracts of $100,000 or more

Portland Public Schools ("District") has engaged the City of Portland ("City"), Procurement Services to provide and administer the Workforce Training and Hiring Program ("Workforce Program"). The following Workforce Training & Hiring Program requirements are a summary of the key contractual obligations of contractors working on District projects. It is the Contractor's responsibility to read and fully understand this section of the bid specifications and to comply with all provisions of the program, regardless of whether they appear on this checklist. Contractors shall include in their bid all costs associated with complying with the Workforce Program.

The prime contractor and all applicable subcontractors are required to provide all workforce utilization related data electronically in LCP Tracker. The prime contractor is responsible for ensuring all subcontractors have completed all requested items.

Information related to contractor access of the system will be provided to a designated point of contact upon award of the contract. LCP Tracker is web-based and can be accessed at the following internet address: www.lcptracker.net

CHECKLIST:

For Contracts of $200,000 or More and Subcontracts of $100,000 or More, Contractors Must:

1. Submit a Workforce Plan (Exhibit 2) to City prior to submittal of first payroll report, or as otherwise designated. A copy of the Workforce Plan should be downloaded, filled out, and then uploaded into LCP Tracker. The Plan should detail your approach and strategies to achieve the targeted workforce goals established by the City.

2. Before starting work on this project, confirm registration as a Training Agent with the Bureau of Labor & Industries (BOLI), Apprenticeship & Training Division. Not a BOLI registered training agent? Contact BOLI (971-673-0760) or City of Portland (503-823-5047) for further information.

3. Ensure that a minimum of 20% of labor hours in each apprenticeable trade are worked by state registered apprentices. Contractors shall fulfill the 20% apprenticeship requirement without exceeding the apprentice ratios approved by the applicable apprenticeship program, if working in excess of 300 hours in any given trade.

4. Strive in good faith to meet the diversity goals of employing women and minorities (both journey and apprentice level workers).

5. Make all reasonable and necessary efforts to employ a workforce that reflects the diversity of the City of Portland, including recruitment of a diverse workforce through the unions, the apprenticeship programs, and other community resources, as described herein.

6. Maintain written documentation of all requests for workers from the unions, apprenticeship programs, and community organizations.

7. When an apprentice is hired: Notify the City's Contract Compliance Specialist assigned to the project.

8. Submit weekly certified payroll reports via the LCP Tracker system no later than the 5th of each month.

For additional information or questions, please contact the Contract Compliance Specialist assigned to the project or the City's Workforce Program Coordinator at 503-823-5047.

ATTACHMENT F

WORKFORCE TRAINING AND HIRING PROGRAM
Specifications

I. PURPOSE

A. General Program Description

The PPS Board of Education has specified that the District will ensure apprenticeship opportunities in the construction trades and will promote construction employment opportunities for minorities and women (ref. Equity in Purchasing and Contracting Policy 8.50.095-P). This objective includes a) ensuring that the District does business with contractors whose workforce reflects the diversity of the workforce found in the City of Portland and Multnomah County, and b) that their contracting dollars provide fair and equal opportunities to the Districts' diverse populations.

To implement this objective, the District has engaged City of Portland, Procurement Services to provide and administer the Workforce Training & Hiring Program ("Workforce Program"). The Workforce Program applies to all projects estimated at $200,000 or more and to each subcontractor having a subcontract of $100,000 or more on the project. The Contractor and all subcontractors are encouraged to fulfill the program requirements even if their contracts are less than these amounts.

Contractors shall make reasonable efforts to ensure that their workforce reflects the diversity of the City of Portland and Multnomah County.

One way contractors can make reasonable efforts to ensure that their workforce is diverse is to recruit, train, and employ minorities and women whenever possible. This portion of the Contract establishes requirements regarding that recruitment, training, and employment.

For purposes of the Workforce Program specifications, the following definitions shall apply:

"Contract" shall mean the contract awarded as a result of these bid specifications.

"Contractor" shall mean the Prime Contractor to whom a Contract is awarded, and any subcontractors with subcontracts of $100,000 or more.

"Minorities" shall include members of either sex who are African-Americans, Hispanic Americans, Asians or Pacific Islanders, Native Americans or Alaskan Native Americans.

"Owner" shall mean the government agency that awarded the Contract, or leveraged public involvement in the project through a loan or development agreement.

"Project" shall include all work performed pursuant to the Contract.

B. Organization of Program Requirements

The Workforce Program specifications are divided into several parts.

Section II - refers to the action the Prime must take in order to be eligible for award of a contract.

Section III - lists the actions that must be taken by the Prime to meet contractual obligations.

Section IV - refers to remedies available to the Owner if a Prime fails to meet the requirements of the Workforce Program specifications.

Section V - refers to the Owner's ability to monitor compliance with the Workforce Program specification by examination of Prime and subcontractor records.

ATTACHMENT F

II. ACTIONS REQUIRED PRIOR TO BEGINNING THE PROJECT

The Prime shall thoroughly read this Workforce Program specification and commit to perform all requirements described herein. The Prime shall submit, before work begins, a Workforce Plan, which demonstrates how the workforce on this project will fulfill all program requirements, including utilization of apprentices and targeted workforce goals.

III. ACTIONS REQUIRED TO SATISFY CONTRACTUAL OBLIGATIONS

A. Make Reasonable Efforts to Have Diverse Workforce

A Prime must make all necessary and reasonable efforts to have a workforce that reflects the diversity of the City of Portland and Multnomah County and is reasonably consistent with the availability of qualified women and minorities based on Equal Employment Opportunity data supplied by the City. This requirement is in addition to any other requirement of this portion of the Contract.

1. Provide written documentation of its good faith recruitment efforts. Contractors must follow the process for recruiting apprentices and journey workers described in Section III, subsection F of this specification. This process is considered by the City to be the minimum effort to recruit a diverse workforce.

2. The failure by a union with whom the Contractor has a collective bargaining agreement to refer either minorities or women shall not excuse the Contractor's obligations under this section of the specifications.

B. Ensure Compliance by Certain Subcontractors

1. The Prime shall ensure that each subcontractor having a subcontract of $100,000 or more, at any tier, shall comply with all of the provisions of the Workforce Program specifications. Contractors shall include in their price all costs associated with this requirement. No change order will be executed in order for the Prime to comply with the Workforce Program specifications.

2. The Prime shall provide a copy of this Workforce Program specification to all subcontractors with contracts of $100,000 or more executed for the project.

C. Register as a Training Agent

The Prime shall register with the Oregon Bureau of Labor and Industries (BOLI) as a Training Agent and ensure that all subcontractors who have contracts in the amount of $100,000 or more are registered as Training Agents. Registration as a Training Agent In a specific trade is not required if there are no training opportunities in that trade on the project, based on the maximum ratio allowed by BOLI.

1. Training programs approved by and registered with BOLI may be used to fulfill training requirements under the Workforce Program specifications. Other training alternatives must be approved by the City's Workforce Program Coordinator.

2. Training is intended to be primarily on-the-job training in apprenticeable crafts, and does not include classifications such as flag person, timekeeper, office engineer, estimator, bookkeeper, clerk/typist, fire fighter, or secretary. Hours performed in crafts, which are not apprenticeable occupations are exempt from the training requirements.

3. Exemptions to the training requirements must be approved by the Owner in writing prior to starting work on the project. Written requests for exemptions related to the training requirements will be considered by the Owner only for extreme circumstances during the course of the project, and must be approved in writing. All requests to exempt all or any portion of the work on a project shall be submitted to the Owner 14 calendar days before any work on the project begins. All exemptions must be approved by the Workforce Program Coordinator. *Please note: Procedures for granting exemptions are subject to change. For the most recent updates, please visit https://www.portlandoregon.gov/citycode/?c=26882&a=408189.*

D. Submit Documentation

The Prime shall submit documentation regarding the following subjects to the Owner. The Owner's failure to object to documentation submitted by the Prime or subcontractor shall not relieve them of the requirements of the Workforce Program specifications.

1. ***Training Agent Status***

   The Prime and all required subcontractors listed on the First Tier Subcontractor Disclosure Form must submit proof to the Contract Compliance Specialist that they are registered Training Agents with BOLI prior to beginning any work on the project.

2. ***Subcontractor Workforce Information***

   Each subcontractor with a contract of $100,000 or more, must submit a Workforce Plan, prior to submission of their first payroll report, or within 5 calendar days after the execution of the applicable subcontract, whichever occurs first. A copy of the Workforce Plan should be downloaded, filled out and then uploaded into LCP Tracker. Work by a subcontractor shall not begin prior to submission of such documentation.

3. ***Prime and Subcontractor Reports After Work Begins***

   Weekly Certified Payroll Reports must be submitted by the Prime and any subcontractor having a subcontract of $100,000 or more, via LCP Tracker, no later than the 5th of each month and will be used to track attainment toward the City's apprentice requirement and diversity goals. All hours subject to prevailing wage rates on public projects, in addition to supervisors, foremen and superintendents, shall be reported.

E. Use of Apprentices

The Prime shall:

1. Ensure that a minimum of 20% of labor hours in each apprenticeable trade performed on the project by the Prime, and subcontractors with subcontracts of $100,000 or more, are worked by state registered apprentices throughout the duration of the project. The Prime and subcontractors shall fulfill the 20% apprenticeship requirement without exceeding the apprentice ratios approved by the applicable apprenticeship program, if working in excess of 300 hours in any given trade.
2. Pay all apprentices the wages required by any applicable collective bargaining contract or pursuant to state or federal law and regulations.
3. Not use workers previously employed at journey-level or those who have successfully completed a training course leading to journey-level status to satisfy the requirements of these provisions.
4. Notify the Contract Compliance Specialist when an apprentice is hired for this project.
5. Count apprentice hours as follows:

   (a) Hours worked on the project by apprentices enrolled in state-approved apprenticeship programs. If the Contractor is unable to fulfill its 20% requirement, then the Contractor may also use methods (b) and (c) below;

   (b) Hours worked on the project by apprentices who are required to be away from the job site for related training during the course of the project, but only if the apprentice is rehired by the same employer after completion of training; and

   (c) Hours worked on the project by graduates of state-registered apprenticeship programs, provided that such hours are worked within the 12-month period following the apprentice's completion date.

ATTACHMENT F

F. Hiring, Requesting, Recruiting, or Replacing Workers

Contractors must follow all of these steps when hiring, requesting, recruiting or replacing workers:

For Apprentices:

1. Using the Worker Request Form, contact the appropriate apprenticeship program or dispatch center to request apprentices who are enrolled in the apprenticeship program; and

2. Request female or minority apprentices from the union or open shop apprenticeship program if such an action will help remedy historical underutilization in the Contractor's workforce.

3. If the apprenticeship program is unable to supply an apprentice and if the program is open for applications or allows direct entry from the Oregon Employment Division, make reasonable and necessary efforts to recruit apprentice applicants from WorkSource at the Oregon Employment Department, and seek to enroll them into an apprenticeship program.

   WorkSource Oregon is Oregon's largest source for job ready applicants:
   - Recruitment Services are locai, statewide, and nationwide
   - Computerized job match system matches applicants to job qualifications
   - On-the-job training resources available to offset cost of new hires
   - Go to: www.imatchskills.org or call 503-257-HIRE

For All Workers:

1. Make reasonable and necessary efforts to employ a diverse workforce. Such actions should include requests for minority and female applicants. Contractors are notified that direct hiring of employees (such as "walk-ons") without providing notification of that job opportunity may not be sufficient to establish the Contractor's efforts to satisfy the diversity goals; and

2. Document employment efforts. Use the Worker Request Form to keep a ***written*** record of requests to:
   a. Union halls for signatory contractors;
   b. Union or open shop apprenticeship programs;
   c. The Oregon Employment Department. Go to: www.imatchskills.org or call 503-257-HIRE;
   d. State-registered pre-apprenticeship programs: http://www.oregon.gov/BOLI/ATD/pages/a_ag_partners.aspx

3. Documentation will be requested by the Owner, if a Contractor is not following their Workforce Plan or meeting the workforce diversity goals, if it appears that the Contractor has not made reasonable and necessary efforts. When requested, the Contractor shall provide that documentation to the Contract Compliance Specialist within 7 calendar days.

NOTE: Contractors may contact the Contract Compliance Specialist for assistance related to any of the above issues.

IV. CONSEQUENCES OF NONCOMPLIANCE WITH WORKFORCE PROGRAM REQUIREMENTS

The Owner's commitment to this program is reflected, in part, by the cost of administering the program. Failure to meet the requirements of this section of the specifications negates such funding and impairs the Owner's efforts to promote workforce diversity and to provide fair and equal opportunities to the public as a whole as a result of the expenditure of public funds. Therefore, the parties mutually agree that failure to meet the requirements of this section of the specifications, including but not limited to the submission of required

documentation, constitutes a material breach of the Contract.

In the event of a breach of this section of the Contract, the Owner may take any or all of the following actions:

A. Withholding Progress Payments

The Owner may withhold all or part of any progress payment or payments until the Prime has remedied the breach of Contract. In the event that progress payments are withheld, the Prime shall not be entitled to interest on said payments.

If a subcontractor(s) is responsible for noncompliance with the Workforce Program requirements, the Owner may choose to withhold only their portion of the progress payment.

B. Retain Sums as Damages for Failure to Comply with Workforce Program Specifications

The parties mutually agree that it would be difficult, if not impossible, to assess the actual damage incurred by the Owner for the Prime's failure to comply with the Workforce Program specifications. The parties further agree that it is difficult, if not impossible, to determine the cost to the Owner when workforce opportunities are not provided. Therefore, if the Prime fails to comply with the Workforce Program provisions of this Contract, the Prime agrees to pay the sum of $250 per day for each day of missed apprenticeship hours or until the breach of Contract is remedied. Damages may be assessed for failure to meet the 20% apprenticeship training requirements by the Prime and each required subcontractor in each trade employed. Damages will be calculated based on the training hours not provided at a rate of $250 per day. For example, if the Contractor was required to provide 200 hours of carpenter training (20% of 1,000 total carpenter hours), and the Contractor only provided 150 training hours, then the difference (50 hours) is divided by 8 (one day of work) to determine the number of days of undelivered training. (50/8 = 6.25 x $250 = $1,562.5).

Damages may also be assessed for failure to fulfill the inclusive hiring process described in Section III, subsections F and G.

These damages are independent of any liquidated damages that may be assessed due to any delay in the project caused by the Contractor's failure to comply with the Workforce Program provisions of the Contract.

C. Retain Sums as Liquidated Damages for Delay

The Prime agrees that any delay to the specified contract time as a result of the Prime's failure to comply with the requirements of these specifications shall subject the Prime to the amount of liquidated damages specified elsewhere in the Contract.

D. Notification of Possible Debarment

By executing this Contract, the Prime agrees that it has been notified that failure to comply with the requirements of this portion of the Contract may lead to the Prime's disqualification from bidding on and receiving other Owner contracts.

E. Other Remedies

The remedies that are noted above do not limit any other remedies available to the Owner in the event that the Prime fails to meet the requirements of the Workforce Program specifications.

V. REVIEW OF RECORDS

In the event that the Owner reasonably believes that a violation of the requirements of the Workforce Program specifications has occurred, the Owner is entitled to review the books and records of the Prime and any subcontractors employed on the project to which the requirements of these specifications are applicable to determine whether such a violation has or has not occurred.

In the event that the Prime or any subcontractor fails to provide the books and records for inspection and copying when requested, such failure shall constitute a material breach of this Contract and permit the imposition of any of the remedies noted in Section IV above, including the withholding of all or part of any progress payment.

ATTACHMENT F

ATTACHMENTS:
Recommended Recruitment & Retention Practices
Apprenticeship Ratio Data

RESOURCES:
Copies of all required forms, including the Workforce Plan and Worker Request Form can be downloaded in the LCP Tracker system at www.lcptracker.net or are available on the City's website at: https://www.portlandoregon.gov/brfs/42255

For questions about the City's Workforce Training and Hiring Program requirements, visit: https://www.portlandoregon.gov/brfs/42255

For information on State-Approved Apprenticeship Programs visit the Bureau of Labor and Industries, Apprenticeship and Training Divisions website: http://www.oregon.gov/BOLI/ATD/pages/index.aspx.

For procedures related to granting exemptions to the training requirements, please visit: https://www.portlandoregon.gov/citycode/?c=26882&a=408189.

For a list of community resources to help with the recruitment of women and minorities, please visit: http://www.oregon.gov/BOLI/ATD/pages/a_ag_partners.aspx

If you have questions after reading the information contained herein and visiting the resources above, please contact Ay Saechao at (503) 823-1090, or the City's Workforce Program Manager at (503) 823-6888.

ATTACHMENT F

RECOMMENDED GOOD FAITH RECRUITMENT & RETENTION PRACTICES

A. Recruitment Efforts

Good faith recruitment efforts are those intense, aggressive, sincere, and result-oriented actions taken by the Contractor designed to accomplish the objectives of the City Workforce Training & Hiring, Good faith recruitment efforts include, but are not limited to:

1. Work aggressively with Contractor's Joint Apprenticeship Training Committee (JATC) to recruit minorities, women and disadvantaged individuals. Provide evidence of these efforts.
2. Assist the JATC by conducting a workshop with minority and women employees to enlist their assistance as recruiters and request their ideas on how to increase employment of underutilized groups.
3. Support the efforts of the Contractor's JATC by giving all apprentices referred to the Contractor a fair chance to perform successfully, allowing for possible lack of previous experience. Recognize that the Contractor is responsible for providing on-the-job training, and that all apprentices should not be expected to have previous experience.
4. Participate in job fairs, school-to-work, and community events to recruit minorities, women, and disadvantaged individuals into the construction trades.
5. Allow scheduled job site visits by participants in community programs, as safety allows, increasing awareness of job and training opportunities in the construction trades.
6. Keep applications of those not selected for an opening. Contact when opening occurs.

B. Retention Efforts

The Contractor shall endeavor to retain minorities, women, and disadvantaged individuals by implementing steps such as the following:

1. Maintain a harassment-free work place.
2. Ensure that employees are knowledgeable about the company's policies if they need to report a harassment problem.
3. Make reasonable attempts to keep apprentices working and train them in all work processes described in the apprenticeship standards.
4. Review and disseminate, at least annually, the company's EEO policy and affirmative action obligations under these specifications with all employees having any responsibility for hiring, assignment, layoff, termination or other employment decisions.
5. Conduct a review, at least annually, of all supervisors' adherence to and performance under the Contractor's EEO policies and affirmative action obligations.
6. Take steps to reduce feelings of isolation among minorities and women to curb hostile attitudes and behavior (e.g., have several minorities and women at the job site, provide access to support group system).
7. Provide adequate toilet facilities for women on the job site.
8. Match minority, female, or disadvantaged apprentices who may need support to complete their apprenticeship programs with a journey-level mentor.

ATTACHMENT F
Apprenticeship Ratio Data

*Ratios may change pursuant to actions taken by the Oregon State Apprenticeship & Training Council/BOLI. For the purposes of this contract, the ratios approved by BOLI on the date the bid is advertised shall prevail.

TRADE	APPRENTICE TO JOURNEY RATIO*		
	1st Apprentice	2nd Apprentice	Max
Asbestos/Insulation Workers	1/1	1/4	
Brick/Marble/Terrazzo/Tile Finisher	1/1	1/3	
Bricklayer/Masonry	1/1	1/3	
Carpenter (Portland)	1/1	1/1	1/1 for first three apprentices; 1/5 after
Carpet Installers/Floorlayers	1/1	1/3	
Cement Masons	1/2 (1/1 Open Shop)	1/3	
Drywall Applicator (Ext/Int Specialists)	1/1	1/1	1/1 for the first three apprentices; 1/5 thereafter
Drywall Finisher (Taper)	1/1	1/3	1/3 thereafter
Electricians			
Inside	1/1	1/3	Allowed 2 apprentices for every 3 journey
Limited Energy/Limited Residential	1/1	1/1	
Construction Lineman	1/1		Max. 2 apprentices a crew/subject to conditions
Limited Maintenance	1/1	1/2	
Stationary Engineer	1/1	1/3	
Elevator Contractor	1/1	1/3	
Environmental Control System (HVAC)	1/1	1/1	Additional apprentices at 1/3
Glass Installer (Glazier)	1/1	1/3	
Hod Carrier/Mason Tender	1/1	1/5	
Iron Worker	1/1	1/3	
Laborer (Construction)	1/1	1/5 (1/3 open shop)	1/10 Union – 10 max
Maintenance Mechanic	1/1	1/3	
Millwright	1/1		1/1 for first three apprentices, 1/5 after
Operating Engineer (Heavy)	1/1-4	2/5-9	3/10-19 4/20-24 5/25-29 30 or more 1/for each 5 additional operators
Painting & Sandblasting	1/1	1/3	
Painting (Traffic Control)	1/1	1/4	
Pile Drivers	1/1	1/1	1/1 for first three apprentices, 1/5 thereafter
Pipe Fitters	1/1	1/1	1/3 thereafter
Plasterers	1/1	1/3	
Plumber	1/1	1/1	1/1 for first two apprentices, 1/3 after
Roofer	1/1	1/1	
Scaffold Erector	1/1		1/1 for the first five apprentices; 1/5 thereafter
Sheet Metal Worker	1/1	1/1	1/1 for first two apprentices, 1/3
Sheet metal Worker (Residential)	1/1	1/3	
Sign Maker/Erector	1/1	1/1	
Sprinkler Fitter	1/1	1/1	1/1 for the first two apprentices on the job; 1/3 thereafter
Steamfitters	1/1	1/1	
Terrazzo Worker	1/1	1/3	
Tile/Marble Setter	1/1	1/3	
Truck Driver (Heavy)	1/1	1/1	

ATTACHMENT F

Exhibit 2

Workforce Plan

Instructions

1. This form must be completed by the prime and each subcontractor with a subcontract of $100,000 or more.
2. Please state how you plan to perform the work on this project, indicating the number of journey workers and apprentices, by trade.
3. This plan must demonstrate how your company will fulfill all Workforce Training & Hiring Program requirements, including utilization of apprentices, and diversity goals.

Bid #: **Project Name:**

Company Name: **Contract Amount:** $

Federal Tax ID: **Prime Contractor:** ☐ **Subcontractor:** ☐

List all Trades to be used on this Project (one trade, per line)	Total # of Journey Workers	Total # of Apprentices	Total # of Female Workers	Total # of Minority Workers	# and level of New Hires (i.e. 1A or 1J)	Anticipated Start Date	Estimated Total Hours (all workers in each trade)

Please list the apprentices who will work on this project. If you need more space, attach an additional sheet of paper. Compliance Staff must approve all apprentices on the project.

Name of Apprentice	Trade	Race	Gender	Date of Hire	STAFF USE ONLY

If no current apprentices, indicate when and how they will be hired:

Name of Workforce Plan Administrator (for Apprentice/Diversity Goals): Phone: Fax:

E-mail address?

Are you a registered Training Agent? ☐ Yes ☐ No Are you a Union or Open Shop Contractor? ☐ Union ☐ Open Shop

Which JATC dispatches apprentices to your company?

Name: Phone: Fax:
Name: Phone: Fax:

Please answer the following questions concerning your efforts to achieve the diversity goals on this project:

1. How do you plan to achieve the diversity goals on this project?

2. Other than your JATC, what resources will you use to recruit minority and female workers for this project (please check all that apply)?
   ☐ Oregon Tradeswomen ☐ ETAP ☐ Portland YouthBuilders
   ☐ Constructing Hope ☐ Job Corps ☐ Other

3. Do you need any assistance with meeting the apprenticeship requirements or diversity goals on this project?
   ☐ Yes ☐ No

Prepared By (print): **Signature:** **Date:**

Portland Public Schools OCIP - Enrollment Forms – Submission Guidelines

Sample Only- OCIP Policy under review/revision by PPS, anticipated sprint 2021

To: Construction Participant

From: Builders Protection Group LLC

You have been designated as a recipient of a construction contract on a project included in the **Portland Public Schools OCIP** program (OCIP Program). The Commercial General Liability and Contractors Pollution Liability for this project is administered through an OCIP (Owner Controlled Insurance Policy), commonly called a "Wrap" or "Wrap-Up" Program. Builders Protection Group LLC has been retained as the Wrap Administrator for the OCIP Program. It is our job to assist you in understanding the OCIP Program and your obligations under it. Your participation begins with the completion of this OCIP enrollment packet. Included in this packet are the following documents:

√ Explanation of Requirements

√ OCIP/Wrap-Up Enrollment Form (Form 1-A)

√ Subcontractor Schedule (Form 1-B)

√ Insurance Credit Worksheet (Form 1-C)

If any of the above-listed documents are not included with this packet, please notify the Wrap Administrator immediately by calling 512-676-4305 (phone) or e-mail at brandee@buildersprotect.com.

To enroll in the OCIP and have permission to begin work on the project, it is your responsibility to provide the following to Builders Protection Group LLC:

- Completed OCIP Wrap-Up Enrollment Form 1-A.
- Complete OCIP Wrap-Up Enrollment Form 1-B. Please include all information on any and all Subcontractors of any tier. This form must be completed no less than **ten (10) days** prior to any Subcontractor(s) beginning onsite work on the project.
- Completed Insurance Credit Worksheet Form 1-C.
- Evidence/Certificates of insurance for Automobile Liability, Workers' Compensation, and Commercial General Liability **activities outside/away from the project Site/location.**
- Declarations/Rate pages from your current CGL insurance policy.

Subcontractors:
Please Submit to Andersen Construction
Attn: Brad Barcroft/Sr. Project Manager
via email: bbarcroft@andersen-const.com

(Andersen will forward onto the OCIP Administrator)

Please ensure the information on the form is complete in its entirety. Personnel from a company that has not been completely documented (including the above-listed documents) will not be allowed onto the project jobsite.

After faxing/e-mailing the OCIP Wrap-Up Enrollment Form 2-A, Subcontractor Form 2-B (if applicable), Insurance Cost Worksheet 2-C, requested Certificates of Insurance **and** Declarations/Rate pages, please retain original copies for your files.

Please direct all questions regarding the above and immediately submit via fax or e-mail all completed forms and documents named in their entirety to:

Builders Protection Group LLC
512-676-4305 (phone)
512-676-4347 (fax)
brandee@buildersprotect.com

Please direct all questions with regards to the Wrap insurance *policy* and corresponding *coverage* to:

Craig Payne
Brown & Brown Northwest
503.219.3267
cpayne@bbnw.com

Respectfully,

Brandee Beebe
Wrap Administrator/ Project Manager
Builders Protection Group LLC

Subcontractors:
Please Submit to Andersen Construction
Attn: Brad Barcroft/Sr. Project Manager
via email: bbarcroft@andersen-const.com

(Andersen will foward onto the OCIP Adminstrator)

Explanation of Requirements

Evidence/Certificates of Insurance Needed for OCIP Wrap Enrollment

In order to be successfully enrolled in this project's OCIP insurance Program, we need to collect copies of a few key documents. From time to time, we get questions as to why the insurance carrier requires these items. Below is a quick explanation for each required document. If you would like to go over these items with us further, please feel free to contact Builders Protection Group LLC at 512-676-4305.

General Liability – Please provide Builders Protection Group LLC with evidence of Commercial General Liability (CGL) insurance for any of your activities performed outside/away from this project site/location.

> *Why this is needed for Wrap Enrollment:* To show evidence/proof of CGL coverage for all other projects outside of this project. This evidence/proof will help protect the Wrap Insurance Policy against exposures arising from work done outside/away from this Project Site/Location.

Workers' Comp – Please provide Builders Protection Group LLC with evidence/proof of Workers' Compensation insurance for your own employees. If your company is exempt from Workers' Compensation requirements, please provide us with proof/letter on your letterhead stating you have no employees working for your company and that you are exempt from Workers' Compensation insurance.

> *Why this is needed for Wrap Enrollment:* To show evidence/proof that your employees are protected/covered for workplace accidents that could happen to one of them while working on this or any other projects for your company.

Auto Liability – Please provide Builders Protection Group LLC with evidence/proof of Automobile Liability insurance for any/all automobiles driving to and from the project site/location.

> *Why this is needed for Wrap Enrollment:* To show evidence/proof that any/all automobiles are covered in case an accident should occur while driving to and/or from the project site/location and/or onto the premises of the Project Site/Location.

NOTE: Depending on the scope of your work, there may be additional insurance requirements including, but not limited to, specific ACORD Form #'s, minimum AM Best ratings, Umbrella/Excess Liability, Additional Insured Endorsements, Waivers of Subrogation, and/or Professional Liability. **Please review your contract for specifics on additional insurance requirements beyond those described above.**

Explanation of Requirements

CGL Insurance Declarations/Rate Pages Needed for OCIP Wrap Enrollment

In order to be successfully enrolled in this project's OCIP insurance Program, we need to collect copies of a few other key documents as well. Oftentimes, we get questions as to why the Sponsor requires these items. Below is a quick explanation for each required document. If you would like to go over these items with us further, please feel free to contact Builders Protection Group LLC at 512-676-4305.

Because the insurance program that covers this project is an OCIP Wrap Program, this project may not be reflected on your existing Commercial General Liability (CGL) insurance policy(ies). As such, when you are being audited by your existing CGL carrier you may decide to exclude this project from your own coverage so you may receive a premium credit. The OCIP policy premium for this project has been paid by the Portland Public School District, but in order for the District to measure the overall "avoided" insurance cost if it had not chosen to purchase an OCIP Wrap Program, it will be necessary to calculate each enrolled participant's Insurance Credit.

As an enrolled participant, your Insurance Credit will be calculated by Builders Protection Group LLC. This cost savings is determined based on your scope of work and total contract value or estimated payroll, depending on how you are charged by your current CGL carrier, as found on your Declarations and Rate page(s) in effect at the time of your enrollment. In order for Builders Protection Group LLC to calculate an accurate cost savings, it will be necessary to review the rates you are being charged under your existing CGL policy.

Declarations Page – Please provide Builders Protection Group LLC with documentation/verification of your current Commercial General Liability (CGL) Declarations page. This is usually the first page(s) of your CGL policy.

> *Why this is needed for Wrap Enrollment:* Generally speaking, this is to verify that the First Named Insured is your company name, that your policy term is currently active, and that your policy number matches the policy number on the accompanying Rate page document required below. This documentation assists us to fairly and accurately determine the appropriate rate to calculate your OCIP Insurance Credit.

Rate Page(s) – Please provide Builders Protection Group LLC with documentation/verification of your current Commercial General Liability (CGL) Rate page(s). This page will usually state a rate based on either Revenue or Payroll per $100 or per $1,000.

> *Why this is needed for Wrap Enrollment:* This is to identify your existing CGL policy premium rate for your scope of work performed on this Project and to verify that your policy number matches the policy number on the accompanying Declarations document required above. This documentation assists us to fairly and accurately determine the appropriate rate to calculate your OCIP Insurance Credit.

Explanation of Credit Calculations

Methodology Used to Determine OCIP Credits

The OCIP cost savings will be determined by examining the rating method your existing CGL insurance carrier uses to charge you for your premium. There are three main methods that CGL carriers utilize. Below is a quick explanation of each of the three methods. If you would like more details on this process, please feel free to contact Builders Protection Group LLC at 512-676-4305.

Receipts – The rates for some Commercial General Liability (CGL) policies are based on the contractor's gross receipts (sales). This is the total amount of your contract value for work performed on the project. Usually, the gross amount is then divided by 1,000 and then multiplied by a numerical rate assigned for your scope of work, also called a "classification code". If you normally perform multiple scopes of work, your policy may assign a different rate depending on the relative risk assessment of each "class code" or type of work. As one might expect, work that is riskier will generally be charged a higher rate than work that is less hazardous to perform and/or less prone to become a hazard later on.

> *Let's look at an example:* Goode Werks has a CGL policy rate based on gross receipts (sales).
> Goode Werks' total receipts for the OCIP project are $75,000 (found in its contract).
> Goode Werks' CGL rate is $12.36 per $1,000 of sales (found on its CGL policy Rate page(s)).
>
> *$75,000 divided by $1,000 multiplied by $12.36* = $927 (the amount of Goode Werks' OCIP credit)

Payroll – The rates for some Commercial General Liability (CGL) policies are based on the contractor's payroll. This is the gross amount of your total payroll for work performed on the project. Usually, the gross amount is then divided by 100 and then multiplied by a numerical rate assigned for your scope of work, also called a "classification code". If you normally perform multiple scopes of work, your policy may assign a different rate depending on the relative risk assessment of each "class code" or type of work. As one might expect, work that is riskier will generally be charged a higher rate than work that is less hazardous to perform and/or less prone to become a hazard later on.

> *Let's look at an example:* Goode Werks has a CGL policy rate based on its payroll.
> Goode Werks' total payroll for the OCIP project is $35,000 (found in its contract amount).
> Goode Werks' CGL rate is $2.62 per $100 of payroll (found on its CGL policy Rate page(s)).
>
> *$35,000 divided by $100 multiplied by $2.62* = $917 (the amount of Goode Werks' OCIP credit)

Other – The rates for some Commercial General Liability (CGL) policies are based on some method other than either total gross receipts (sales) or payroll. This could be a rate based on square footage, work hours, # of employees, a composite rate or some other factor. Since it may be difficult to determine a numerical "rate" for your work, Builder Protection Group LLC may assess a fair credit based on current comparable rates for similar trades, records of which are maintained in our extensive database.

> *Let's look at an example:* Goode Werks has a CGL policy rate based on a non-standard method. The rate usually charged for trades similar to Goode Werks is 0.12% of contract value (found in our database).
> Goode Werks' total contract amount for the OCIP project is $75,000 (found in its contract).
>
> *$75,000 multiplied by 0.012* = $900 (the amount of Goode Werks' OCIP credit)

OCIP WRAP-UP
SUBCONTRACTOR ENROLLMENT FORM (FORM 1-A)
PORTLAND PUBLIC SCHOOLS

PROJECT INFORMATION

Project Name _____

Type of Work to be Done _____

_____

Est. Start Date _____ Est. End Date _____

SUBCONTRACTOR INFORMATION

Company Name _____ License # _____

LLC ☐ Ptshp ☐ Corp ☐ Other ☐ _____ Federal ID # _____

Company Address _____ Suite _____

City _____ State _____ ZIP _____

Office Contact _____ Phone _____ Fax _____

E-Mail _____

Site Contact _____ Phone _____ Fax _____

E-Mail _____

SUBCONTRACTOR INSURANCE INFORMATION

General Liability Carrier _____ CGL Policy # _____

Workers' Comp. Carrier _____ WC Policy # _____

Business Auto. Carrier _____ Policy # _____

Fill out the **Sub- tier contractor Form 1-B** (provided with your enrollment documents) with the appropriate information on all **Sub- tier contractors** intended to provide services on the project. This form must be completed and submitted **ten (10) days** prior to any Subcontractors performing any onsite work. If you have employed any Subcontractors, it is the task of your organization to recover any insurance deducts from that Subcontractor. Fill out the Insurance Credit Worksheet Form 1-C (provided with your enrollment documents).

NOTE: The **following** information must also be submitted with this application:

☑ Copy of **Certificate of Insurance for Workers Compensation, Auto and General** liability, with **Your General Contractors** name as the certificate holder

☑ **Either a blanket Additional Insured endorsement** for your **General Liability** with your GL policy number on it or one naming the **following**:

- **School District No. 1J, Multnomah County**, OR (**Portland Public Schools**) 501 N. Dixon Street Portland, OR 97227
- Your **General Contractors** Name.

☑ Copy of **Declarations and Rate pages** from your current CGL policy

I hereby certify to the best of my knowledge that all of the above information is true and accurate in all respects and I am requesting to be enrolled in the OCIP referenced in this document.

Signed on this _____ day of _____, 20___

Authorized Representative Signature: _____

Printed Name: _____

Title: _____

Send this form and/or direct any questions to the Wrap Administrator:

Brandee Beebe
Builders Protection Group LLC
201 W Howard Lane
Austin, Texas 78753
512-676-4305 (Phone)
512-676-4347 (fax)
brandee@buildersprotect.com

SUB CONTRACTOR SCHEDULE (FORM 1-B)

Fill out the table below with the appropriate information on all **Sub tier contractors** (***construction participants with which you have a direct contract***) to be used on the project. We understand that you may not have a complete list of all Subcontractors at this time. *If you are certain you will not be hiring any Subcontractors, please mark the fields below as N/A or None*. Include this Form with your OCIP Wrap-Up Enrollment Form 1-A. Please inform Builders Protection Group LLC if additional forms are required.

Send this form in with the other enrollment forms to your BPG Wrap Administrator:

Via FAX: **512-676-4347**

Via E-MAIL: brandee@buildersprotect.com

Via MAIL: Attention: Brandee Beebe (Portland Public Schools OCIP)
Builders Protection Group LLC
201 W Howard Lane
Austin, Texas 78753

Sub tier contractor #1

Company Name		Address #1	
Contact Name		Address #2	
Phone Number		City, State, ZIP	
Fax Number		Contract Amount	$
E-Mail Address		CCB#	
Scope of Work			

Sub tier contractor #2

Company Name		Address #1	
Contact Name		Address #2	
Phone Number		City, State, ZIP	
Fax Number		Contract Amount	$
E-Mail Address		CCB#	
Scope of Work			

Sub tier contractor #3

Company Name		Address #1	
Contact Name		Address #2	
Phone Number		City, State, ZIP	
Fax Number		Contract Amount	$
E-Mail Address		CCB#	
Scope of Work			

Subcontractor Form 2-B

Sub tier contractor #4

Company Name		Address #1	
Contact Name		Address #2	
Phone Number		City, State, ZIP	
Fax Number		Contract Amount	$
E-Mail Address		CCB#	
Scope of Work			

Sub tier contractor #5

Company Name		Address #1	
Contact Name		Address #2	
Phone Number		City, State, ZIP	
Fax Number		Contract Amount	$
E-Mail Address		CCB#	
Scope of Work			

Sub tier contractor #6

Company Name		Address #1	
Contact Name		Address #2	
Phone Number		City, State, ZIP	
Fax Number		Contract Amount	$
E-Mail Address		CCB#	
Scope of Work			

Sub tier contractor #7

Company Name		Address #1	
Contact Name		Address #2	
Phone Number		City, State, ZIP	
Fax Number		Contract Amount	$
E-Mail Address		CCB#	
Scope of Work			

INSURANCE CREDIT WORKSHEET (FORM 1-C)
PORTLAND PUBLIC SCHOOLS OCIP

PROJECT NAME: _____

CONTACT INFO:

Sub-contractor Name: _____

Address, City, ST Zip Code: _____

Contact Person: _____ Title: _____

Phone: _____ Fax: _____

email: _____

CONTRACT DETAILS:

Work Performed: _____

% Self-Performed: _____

Are you performing: ____ Asbestos removal ___ Hazardous waste remediation ___

Supplying materials ONLY ___

Premium is based on: Sales/Receipts ___ Contract Amount: $ _____

Payroll ___ Est. Payroll Amount: $ _____

Other ___ Please describe: _____

GL Rate: $ _____

Premium is calculated (pick one): Per $100 ___ Per $1,000 ___

Calculated Premium: $ _____

By signing below, I hereby warrant that the information provided on this Worksheet is complete and accurate to the best of my knowledge. I will provide documentation from my **CGL policy** that supports the information on this Worksheet. I agree that my payroll may be audited in the event that my reported payroll is less than the industry standard for my trade.

_____ _____ _____

Signature **Title** **Date**

Please complete and return via fax at **512-676-4347** or email to brandee@buildersprotect.com.

Your GL Rate and Declarations pages must accompany this worksheet!

EXHIBIT O

PORTLAND PUBLIC SCHOOLS, SCHOOL DISTRICT NO. 1J
MULTNOMAH COUNTY, OREGON
INSURANCE REQUIREMENTS

Sample of Proposed Language from similar project to be incorporated into BHS Prime Contract

Whereas, for good and valuable consideration, receipt and sufficiency of which is hereby acknowledged, **Portland Public School District** (Owner) desires to implement an Owner Controlled Insurance Policy (OCIP), or a "Wrap Up" Policy, for certain insurable risks as set forth in the OCIP policy. The primary OCIP policy is placed with **Gemini Insurance Company** and mandates, among other requirements, a third party wrap up administrator, and that shall be Builders Protection Group LLC ("OCIP Administrator").

1. OCIP INSURANCE AND INDEMNITY PROVISION

a. The Owner of this project has elected to purchase an Owner Controlled Insurance policy (OCIP) naming it, as well as other designated Contractors, and for certain risks associated with the project as set forth by the Owner. The Enrollment process is defined by the policy and detailed through documents which will be made available by the OCIP Administrator. Contractors are considered to be enrolled in the OCIP upon the issuance of a Certificate of Enrollment. OCIP enrollment must take place prior to commencement of work performed on the project. All Contractors and Subcontractors shall be enrolled in the OCIP through the OCIP Administrator.

b. Risks covered and not covered by the OCIP are listed in the Program insurance policy. It is the Contractor's responsibility to review the policy and obtain any desired legal review and analysis it deems appropriate and in its judgment necessary regarding the Program. There are no representations regarding the nature, quality or limits of the Program policies and Contractor expressly acknowledges the lack of reliance upon any representations made by Owner, other Contractors, Subcontractors, the OCIP Administrator or their representatives regarding the nature, quality or limits of the insurance provided by the Program. Contractor shall hold Owner, the OCIP Administrator and their representatives, including, but not limited to, insurance brokers and/or agents, free and harmless from any and all claims asserting or alleging that the type and/or amount of coverage provided under the Program is inadequate, deficient, insufficient, or in any way not providing the nature and amount of coverage that might at a later date be deemed or claimed to be appropriate. The Program is intended to be the primary source of coverage for the risks covered and shall be primary to Contractor's insurance, if any, in the Program covered areas of risk.

Following is an outline of the OCIP terms and coverage.

The effective date of the OCIP program is 4/15/2014 and expires 4/15/19 or as otherwise extended. The coverage also provides an extended reporting period equal to 10 years or the Statutory Period of Repose in the State of Oregon.

Commercial General Liability (CGL)– Gemini Insurance Company

Each Occurrence Limit	$2,000,000
General Aggregate Limit	$4,000,000
Products-Completed Operation Aggregate Limit	$4,000,000
Personal & Advertising Injury	$2,000,000
Damage to Premises Rented to You	$ 100,000
Medical Payment Limit (no fault)	$ 10,000

Excess Liability Limits (Excess)

Each Occurrence Limit	$100,000,000
General Aggregate Limit	$100,000,000
Products-Completed Operation Limit	$100,000,000

Excess Insurers are as follows;

- Allied World
- Gemini
- Great American
- Endurance

The Commercial General Liability and Excess coverage shall include all major coverage categories including bodily injury, property damage, and products and completed operations coverage maintained for 10 years following completion of contract. The CGL insurance will also include the following: (1) separation of insureds; (2) incidental medical malpractice; (3) per-project aggregates equal to 2.5 times the General Aggregate and 2.0 times the Products and Completed Operations Aggregate; (4) amendments to exclusion **j., k., l.**; (5) Primary and Noncontributory; (6) Coverage for call back work.

Contractors Pollution Liability (CPL)

Per Occurrence Limit	$50,000,000
Aggregate Limit for all Pollution Conditions	$50,000,000

Insurers are as follows;

- Illinois Union Insurance
- Tokyo Fire and Marine

The Contractors Pollution Policy covers Bodily Injury and Property Damage arising from a Pollution Condition. Pollution Condition means the discharge, dispersal, release, escape, migration, or seepage of any solid, liquid, gaseous or thermal irritant, contaminant or pollutant, including soil, sedimentation, silt, smoke, soot, vapors, fumes, acids, alkalis, chemicals, hazardous substances, hazardous materials, or waste materials on, in, into, or upon land and structures thereupon, the atmosphere, surface water or groundwater. For the purpose of this definition, waste materials includes, but is not limited to, “low-level radioactive waste”, “mixed waste” and medical, infectious or pathological wastes.

In the event the Contactor is deemed by Owner to be responsible for a claim covered by the OCIP, the Contractor will pay up to $5,000 per occurrence on the CGL/Excess and $10,000 on the CPL. This is not a deductible. This is a contractual indemnity obligation of the Contractor.

c. Contractor agrees to furnish appropriate information, as detailed by the OCIP Administrator, about all subcontractors that will perform work on the project on behalf of the Contractor. Contractor shall incorporate these terms into all construction subcontracts and assure each Subcontractor's compliance with the requirements of the OCIP, and/or in the Contract Documents for the term of each subcontract. All eligible Subcontractors shall be enrolled in the OCIP Wrap Program.

d. Contractor agrees to follow and complete all enrollment procedures and insurance cost reporting procedures. Contractor shall exclude from bids the full cost of Contractor’s own CGL insurance. The OCIP Administrator shall review all insurance bid deduct information, and identify Contractor’s minimum reduction in insurance costs (“Insurance Credit”) due to eligibility for the OCIP Coverages. Subsequent change order proposals shall be submitted exclusive of all CGL insurance costs, and Contractor shall identify an additional Insurance Credit following the same procedure identified above. At the end of the work and if Contractor’s Insurance Credit was calculated based on Contractor’s initially reported payroll, Owner reserves the right to audit Contractor’s actual payroll and a final adjusted Insurance Credit may be calculated by the OCIP Administrator.

e. Contractor acknowledges receipt of OCIP Contractor Guidebook/Manual, included as an attachment to the Contract, and agrees to perform provisions set forth.

f. Contractors agree to waive their rights to subrogation on behalf of their insurers. This includes, but is not limited to builders’ risk and workers’ compensation insurance. Contractors shall waive all rights against each other for damages that are otherwise covered under the applicable insurance.

g. Contractor’s indemnity obligations shall apply in the event that the OCIP does not in fact fully protect, defend and indemnify Owner, Contractor and other indemnified parties. Contractor’s indemnity obligations are excess to the OCIP coverage and shall not take effect until and unless the insurance provided under the OCIP is exhausted, inapplicable to the particular claims or otherwise unavailable. In the event that the OCIP is exhausted, inapplicable or unavailable, Contractor’s indemnity obligations shall immediately be triggered. Contractor’s obligations to defend and indemnify Owner, and other indemnified parties shall exist whether or not there is available insurance coverage.

2. CONTRACTOR'S INSURANCE REQUIREMENTS OUTSIDE OF THE OCIP PROGRAM

Contractor agrees to have all required coverage that Contractor must have by law. In addition, the following coverages will be in place for protection if you are not enrolled in the OCIP program or whenever working off the project site.

a. **Required Coverage.** Without waiver of any other requirement of the Contract Documents, the Contractor will provide, pay for, and maintain in full force and effect at all times during the performance of the Work until final acceptance of the Work or for such further duration as required, the following policies of insurance issued by a responsible carrier. All of the Contractor's insurance carriers shall be rated A VII or better by A.M. Best's rating service, unless otherwise approved by the Owner.

1. Workers' Compensation. Workers' compensation coverage sufficient to meet statutory liability limits.

2. Employer's Liability. The Contractor shall purchase and maintain employer's liability insurance in addition to its workers' compensation coverage with at least the minimum limits in section **b.** below.

3. Commercial General Liability. The Contractor shall purchase and maintain commercial general liability ("CGL") insurance for off-site exposures on an occurrence basis, written on ISO Form CG 00 01 (12/04 or later) or an equivalent form approved in advance by the Owner. CGL coverage shall include all major coverage categories including bodily injury, property damage and products/completed operations coverage. The CGL insurance will also include the following: (1) separation of insureds; (2) incidental medical malpractice; and (3) per-project aggregate for premises operations.

4. Professional Liability/Errors and Omissions. To the extent that the Contractor accepts design or design/build responsibilities, the Contractor shall purchase and maintain professional liability/errors and omissions insurance or cause those Subcontractors providing design services do so.

5. Automobile Liability. The Contractor shall purchase and maintain automobile liability insurance with coverage for owned, hired, and non-owned vehicles on ISO form CA 00 01 or an equivalent form approved in advance by the Owner. The automobile liability insurance shall include pollution liability coverage resulting from vehicle overturn and collision.

b. **Limits.** The insurance required by this exhibit shall be written for at least the limits of liability specified in this Section or required by law, whichever is greater.

Workers' Compensation.	Statutory Limits
Employer's Liability.	
Each Accident:	$1,000,000
Each Bodily Injury Disease:	$1,000,000
Aggregate Bodily Injury Disease:	$1,000,000
Commercial General Liability.	
Each Occurrence:	$1,000,000
General Aggregate:	$2,000,000
Product/Completed Operations:	$2,000,000
Personal & Advertising Injury:	$1,000,000
Fire Damage Limit:	$ 100,000
Medical Expense Limit:	$ 5,000
Automobile Liability.	
Combined Single Limit:	$1,000,000
Professional Liability/Errors & Omissions.	
Single Limit:	$1,000,000
Aggregate:	$1,000,000

c. **Additional Insureds.** The Contractor's third-party liability insurance policies shall include the Owner and its officers, employees, agents, volunteers, partners, successors, and assigns as additional insureds. The policy endorsement must extend premises operations and products/completed operations to the additional insureds. The additional insured endorsement for the CGL insurance must be written on ISO Form CG 20 10 (11/85), a CG 20 37 (07/04) together with CG 20 33 (07/04), or the equivalent; but shall not use the following forms: CG 20 10 (10/93) or CG 20 10 (03/94).

d. **Joint Venture.** If the Contractor is a joint venture, the joint venture shall be a named insured for the liability insurance policies.

e. **Primary Coverage.** The Contractor's insurance shall be primary insurance coverage and may not seek contribution from any insurance or self-insurance carried by the Owner or the Architect including any property damage coverage carried by the Owner. Contractor's insurance shall apply separately to each insured against whom a claim is made or suit is brought. The Contractor's insurance shall not include any cross-suit exclusion or preclude an additional insured party from asserting a claim as a third party.

f. **Contractor's Failure to Maintain Insurance.** If the Contractor for any reason fails to maintain required insurance coverage, such failure shall be deemed a material breach of the Contract and the Owner, at its sole discretion, may suspend or terminate the Contract pursuant to Section 108.11 of the General Conditions. The Owner may, but has no obligation to, purchase such required insurance, and without further notice to the Contractor, the Owner may deduct from the Contract Sum any premium costs advanced by the Owner for such insurance. Failure to maintain the insurance coverage required by this exhibit shall not waive the Contractor's obligations to the Owner.

g. **Certificates of Insurance**. The Contractor shall supply to the OCIP Administrator and/or Owner Certificates of Insurance (COI) for the insurance policies described in this exhibit prior to the commencement of the Work and before bringing any equipment or construction personnel onto the Project site.

   1. Additional Certificates. To the extent that the Contractor's insurance coverage's are required to remain in force after final payment and are reasonably available, an additional certificate evidencing continuation of such coverage shall be submitted with the final Application for Payment. Information concerning reduction of coverage on account of revised limits or claims paid under the general aggregate, or both, shall be furnished by the Contractor with reasonable promptness in accordance with the Contractor's information and belief.

   2. Prohibition Until Certificates Received. The Owner shall have the right, but not the obligation, to prohibit the Contractor and its Subcontractors from entering the Project site until the required certificates (or other competent evidence that insurance has been obtained in complete compliance with this exhibit) are received and approved by the OCIP Administrator and or Owner.

   3. Deductibles/Self-Insured Retentions. Payment of deductibles or self-insured retentions is a Cost of the Work within the Guaranteed Maximum Price and does not justify a Change Order. Satisfaction of all self-insured retentions or deductibles will be the sole responsibility of the Contractor.

h. **Subcontractors Insurance.** The Contractor shall cause each Subcontractor to purchase and maintain in full force and effect policies of insurance as specified in this exhibit, except for coverage limits, which will be agreed upon between the Owner and the Contractor. The Contractor will be responsible for the Subcontractors' coverage if the Subcontractors fail to purchase and maintain the required insurance. When requested by the Owner, the Contractor will furnish copies of certificates of insurance establishing coverage for each Subcontractor.

i. **Limitations on Coverage.**

   1. No insurance provided by the Contractor under this exhibit will be required to indemnify the Owner, the Architect, or their employees or agents to the extent of liability for death or bodily injury to persons or damage to property caused in whole or in part by their own negligence, but will require indemnity to the extent of the fault of the Contractor or its agents, representatives, or Subcontractors.

2. The obligations of the Contractor under this exhibit shall not extend to the liability of the Architect or its consultants for (1) the preparation or approval of maps, Drawings, opinions, reports, surveys, Change Orders, designs, or specifications, or (2) the giving or failure to give directions or instructions, to the extent that the directions, or failure to provide directions, are the cause of the injury or damage.

3. By requiring insurance, the Owner does not represent that coverage and limits will necessarily be adequate to protect the Contractor. Insurance in effect or procured by the Contractor will not reduce or limit the Contractor's contractual obligations to indemnify and defend the Owner for claims or suits that result from or are connected with the performance of the Contract.

3. PROPERTY INSURANCE:

a. **Builder's Risk**. As applicable to the project, Owner shall provide builder's risk insurance for the Project covering physical loss or damage to the Work in the amount of the total Project sum. Such insurance shall cover the work, false work, temporary structures, all supplies and materials furnished in connection therewith and destined to become a part of the Work, and shall include some limited amount of off-site storage and transit coverage.

If such builder's risk insurance has a deductible, the Contractor shall be responsible for the first $10,000 under the deductible. The remainder of such deductible, if any, shall be the responsibility of the first named insured on the policy.

Should Owner decide not to provide builder's risk insurance, Owner shall immediately notify Contractor of such decision and allow Contractor to procure builder's risk insurance. The Owner shall also allow Contractor to submit a Change Order to Owner for the reimbursement of the cost of builder's risk insurance as procured by the Contractor.

Any claim against the builders risk insurance policy must be made in accordance with, and is subject to, Section 14 of the Construction Contract General Conditions (“Claims and Disputes”).

b. **Contractor's Responsibility.** Contractor must provide insurance for its own machinery, tools, equipment, or supplies that are not to become a part of the Project.

Exhibit 9- 5.6
BIM Execution Plan
Place Holder

PREVAILING WAGE RATES

for

Public Works Contracts in Oregon

OREGON BUREAU OF LABOR AND INDUSTRIES

Val Hoyle
Commissioner
Bureau of Labor and Industries

Effective: July 1, 2019

VAL HOYLE
COMMISSIONER

DUKE SHEPARD
DEPUTY COMMISSIONER

BUREAU OF LABOR AND INDUSTRIES

July 1, 2019

In January and July of each year, the Bureau of Labor and Industries publishes the prevailing wage rates that are required to be paid to workers on non-residential public works projects in the state of Oregon. Quarterly updates are published in April and October.

A separate publication, entitled "*Definitions of Covered Occupations for Public Works Contracts in Oregon*," provides occupational definitions used to classify the duties performed on public works projects.

These publications are available electronically on the bureau's website at www.oregon.gov/boli. In order to contain costs and preserve limited budget resources, BOLI is no longer automatically mailing copies of these publications to contracting agencies, contractors, and other interested parties. Those on the agency's mailing list will receive an email notification whenever the publications are amended in the future. One complimentary hard copy of each PWR publication is available upon request by emailing BOLI at pwremail@boli.state.or.us or calling 971-673-0838. Additional copies are available at cost, plus postage.

Also available on the bureau's website is a link to the federal Davis-Bacon rates. This link is posted in order to assist contractors and public agencies in determining which rates to pay on projects in Oregon subject to BOTH the state PWR and federal Davis-Bacon Act. The higher of the wage rates must be paid on such projects.

Unless specifically exempted by state law, prevailing wage rates are the minimum wages that must be paid to all workers employed on all public works. These rates are determined using data collected from a statewide construction industry wage survey of occupations and crafts performing commercial building and heavy and highway construction in 14 geographic regions of the state.

ORS 279C.830 requires that the applicable wage rates be incorporated into all bid specifications for public works contracts subject to the PWR law. A statement incorporating the applicable prevailing wage rate publication and any amendments thereto or Davis-Bacon wage rate determination into the specifications *by reference* will satisfy these requirements. Such reference must include the title of the applicable wage rates publication or determination and the date of the publication or determination as well as the date of any applicable amendments. A provision that prevailing wage rates must be paid must also appear in the contract.

Generally, the rates in effect at the time the bid specifications are first advertised are those that apply for the duration of the project. There are some exceptions to this rule. For example, if during the bidding process, the prevailing wage rates change, the public agency has the option of amending the bid specifications to reflect such changes. If a Construction Manager/General Contractor (CM/GC) is used on the project, the rates in effect at the time the CM/GC contract becomes a public works contract are the applicable rates to be used for the duration of the project. (See OAR 839-025-0020 for more information.) Note that the applicable rates for purposes of compliance with the federal Davis-Bacon Act may be different than the applicable rates for purposes of compliance with Oregon's prevailing wage rate laws. The effective federal rates will be those as determined under 29 CFR 1.6.

If you have any questions regarding application of the state PWR law or the applicable rates to be paid on any project, contact the bureau's Prevailing Wage Coordinator in Portland at (971) 673-0839.

Val Hoyle
Commissioner
Bureau of Labor and Industries

TABLE OF CONTENTS

JULY 1, 2019

How to Look up a Rate/BOLI Offices 1

Public Works Bonds 2

PWR Survey Wage Rate Appeal Process 3

PWR Required Postings 4

Map of Prevailing Wage Rate Regions 5

Occupations by Regions

Region 1 - Clatsop, Columbia and Tillamook Counties 6
Region 2 - Clackamas, Multnomah and Washington Counties 8
Region 3 - Polk, Marion and Yamhill Counties 10
Region 4 - Benton, Lincoln and Linn Counties 12
Region 5 - Lane County 14
Region 6 - Douglas County 16
Region 7 - Coos and Curry Counties 18
Region 8 - Jackson and Josephine Counties 20
Region 9 - Hood River, Sherman and Wasco Counties 22
Region 10 - Crook, Deschutes and Jefferson Counties 24
Region 11 - Klamath and Lake Counties 26
Region 12 - Gilliam, Grant, Morrow, Umatilla and Wheeler Counties 28
Region 13 - Baker, Union and Wallowa Counties 30
Region 14 - Harney and Malheur Counties 32

Appendix 35

List of Ineligible Contractors 53

Forms 59

BOLI forms necessary to comply with ORS 279C.800 through ORS 279C.870 may be found in the back of this booklet. Contractors are encouraged to use and keep on file the forms provided as master copies for use on future prevailing wage rate projects.

All of the information in this booklet can be accessed and printed from the Internet at: www.oregon.gov/BOLI

Pursuant to ORS 279C.800 to ORS 279C.870, the prevailing wage rates contained in this booklet have been adopted for use on public works contracts in Oregon. Additional copies of this booklet are available at cost, plus postage.

HOW TO LOOK UP A RATE

1. **When was the project first advertised for bid?**
   For purposes of compliance with Oregon's prevailing wage rate laws, the rates in effect at the time the bid specifications are first advertised are those that apply for the duration of the project. (See OAR 839-025-0020(6) for information about projects using a CM/GC.)

2. **What type of work is being performed by the employee?**
   Using the booklet, *Definitions of Covered Occupations* find the definition that most closely matches the actual work being performed by the worker. If you have any questions about work classifications, contact BOLI at the number below.

3. **Where is the work being performed – what region?**
   Find the occupation in the correct region pages associated with the county where the project construction is taking place.

4. **Is there a rate listed next to the classification?**
   If so, use it. The prevailing wage rate is made up of an hourly base rate and an hourly fringe rate; it is the combination of these two amounts that must be paid to the worker.

5. **If the book directs you to "See Appendix," go to the back of the book and use the rate listed in the Appendix pages.** It may include a group number, shift differential, hazard pay and/or zone pay which are added to the hourly base rate.

6. **Apprentices** must be paid the full fringe rate in those regions where the appendix rate does not apply. However, if the book directs you to "See Appendix," and the worker is registered in a bona fide apprenticeship program, **you may contact BOLI at (971) 673-0839** for the applicable hourly fringe rate.

7. **If you still don't know CALL BOLI at (971) 673-0839.**

A short video is also available at www.oregon.gov/boli/WHD/PWR/Pages/pwr_state.aspx.

For specific information or questions regarding the prevailing wage law, you may obtain a "Prevailing Wage Rate Laws" handbook by contacting the nearest Oregon Bureau of Labor and Industries office listed below. An order form is in the back of this booklet.

BOLI Office Locations

Eugene	1400 Executive Parkway, Suite 200 Eugene, OR 97401	(541) 686-7623
Portland	800 NE Oregon St., #1045 Portland, OR 97232	(971) 673-0761
Salem	3865 Wolverine St. NE, Bldg. E-1 Salem, OR 97305	(503) 378-3292

PUBLIC WORKS BONDS

EVERY CONTRACTOR AND SUBCONTRACTOR who works on public works projects subject to the prevailing wage rate (PWR) law is required to file a **$30,000 "PUBLIC WORKS BOND"** with the Construction Contractor's Board (CCB). (ORS 279C.836) This includes flagging and landscaping companies, temporary employment agencies, and sometimes sole proprietors.

- This bond is to be **USED EXCLUSIVELY FOR UNPAID WAGES** determined to be due by the Bureau of Labor and Industries (BOLI).
- The bond **MUST** be filed **BEFORE STARTING WORK** on a prevailing wage rate project.
- The bond is in effect **CONTINUOUSLY** (do not have to have one per project).
- **BEFORE PERMITTING A SUBCONTRACTOR TO START WORK** on a public works project, **CONTRACTORS MUST VERIFY** their subcontractors have either filed the bond, or have elected not to file a public works bond due to a bona fide exemption.
- A public works bond is in addition to any other required bond the contractor or subcontractor is required to obtain.

Exemptions:

- Allowed for a disadvantaged business enterprise, a minority-owned business, woman-owned business, a business that a service-disabled veteran owns or an emerging small business certified under ORS 200.055, for the first FOUR years of certification;
    - Exempt contractor must still file written verification of certification with the CCB, and give the CCB written notice that they elect not to file a bond.
    - The prime contractor must give written notice to the public agency that they elect not to file a public works bond.
    - Subcontractors must give written notice to the prime contractor that they elect not to file a public works bond.
- For projects with a total project cost of $100,000 or less, a public works bond is not required. (Note this is the total project cost, not an individual contract amount.)
- Emergency projects, as defined in ORS 279A.010(f).

ORS 279C.830(2) requires:

That the **specifications** for every contract for public works shall contain a provision stating that the contractor and every subcontractor must have a public works bond filed with the CCB before starting work on the project, unless otherwise exempt.

Every contract awarded by a contracting agency shall contain a provision requiring the contractor:

- To have a public works bond filed with the CCB before starting work on the project, unless otherwise exempt;
- To include in every subcontract a provision requiring the subcontractor to have a public works bond filed with the CCB before starting work on the project unless otherwise exempt.

Every subcontract that a contractor or subcontractor awards in connection with a public works contract must require any subcontractor to have a public works bond filed with the Construction Contractors Board before starting work on the public works project, unless otherwise exempt.

PWR SURVEY WAGE RATE APPEAL PROCESS

1) Anyone wishing to challenge or appeal a survey rate determination should submit their request in writing to the commissioner.

2) The appeal should include:
   a) a complete description of the “problem,” including the affected trade(s), and documentation or evidence (if available) supporting why the rate determination is incorrect
   b) recommendations for how the rate could be more accurately determined.

3) The written appeal will be reviewed by the Wage and Hour Division which will recommend to the commissioner a course of action and proposed time frame for addressing the issue (such as a recommendation that further information be obtained, an investigation or study of the matter be conducted, a rate amendment or correction be issued, the next survey be modified, etc.).

4) The commissioner will review the division’s recommendation and either approve, disapprove or modify the recommendation. (The PWR Advisory Committee may be consulted in some matters as deemed appropriate by the commissioner.)

5) The requesting party will be notified of the commissioner’s decision.

PWR REQUIRED POSTINGS

ALL CONTRACTORS AND SUBCONTRACTORS

PREVAILING WAGE RATES

Each and every contractor and subcontractor engaged in work on a public works must post the applicable prevailing wage rates for that project in a conspicuous place at the work site so workers have ready access to the information. ORS 279C.840(4); OAR 839-025-0033(1).

DETAILS OF FRINGE BENEFIT PROGRAMS

When a contractor or subcontractor provides for or contributes to a health and welfare plan or a pension plan, or both, for the contractor or subcontractor's employees who are working on a public works project, the details of all fringe benefit plans or programs must be posted on the work site. The posting must include a description of the plan or plans, information about how and where claims can be made and where to obtain more information. The notice must be posted in a conspicuous place at the work site in the same location as the prevailing wage rates (see above). ORS 279C.840(5); OAR 839-025-0033(2)

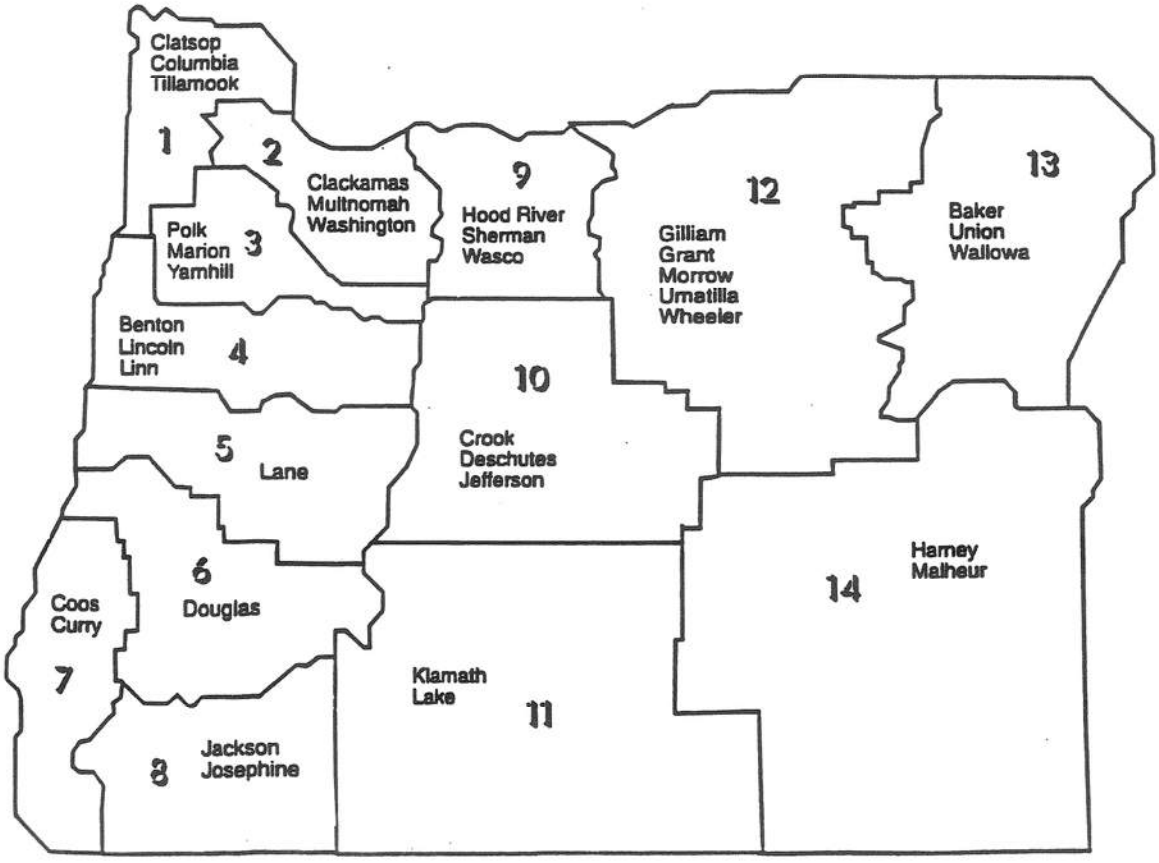
WORK SCHEDULE

Contractors and subcontractors must give workers the regular work schedule (days of the week and number of hours per day) in writing, before beginning work on the project. Contractors and subcontractors may provide the schedule at the time of hire, prior to starting work on the contract, or by posting the schedule in a location frequented by employees, along with the prevailing wage rate information and any fringe benefit information. If an employer fails to give written notice of the worker's schedule, the work schedule will be presumed to be a five-day schedule. The schedule may only be changed if the change is intended to be permanent and is not designed to evade the PWR overtime requirements. ORS 279C.540(2); OAR 839-025-0034.

PREVAILING WAGE RATES

OCCUPATIONS
BY
REGIONS

PREVAILING WAGE RATE
REGIONS



Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	See Appendix	See Appendix
Bricklayer/Stonemason	See Appendix	See Appendix
Bridge and Highway Carpenter	$36.07	$15.26
Carpenter Group 1 & 2	$31.51	$12.63
Cement Mason	$28.77	$14.17
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	See Appendix	See Appendix
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	See Appendix	See Appendix
Drywall Taper	$32.24	$13.19
Electrician	See Appendix	See Appendix
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger (See Laborer Group 3)	See Appendix	See Appendix
Glazier	See Appendix	See Appendix
Hazardous Materials Handler/Mechanic	See Appendix	See Appendix
Highway and Parking Striper	$26.11	$8.20
Ironworker	$33.00	$19.35
Laborer Group 1	See Appendix	See Appendix
Laborer Group 2	See Appendix	See Appendix
Laborer Group 3	See Appendix	See Appendix
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	$30.78	$10.06
Line Constructor	See Appendix	See Appendix
Marble Setter	See Appendix	See Appendix
Millwright Group 1 & 2 (See Carpenter Group 3 & 4)	See Appendix	See Appendix
Painter	See Appendix	See Appendix
Piledriver	$35.95	$15.48
Plasterer and Stucco Mason	$23.81	$18.19
Plumber/Pipefitter/Steamfitter	See Appendix	See Appendix
Power Equipment Operator Group 1	See Appendix	See Appendix
Power Equipment Operator Group 1A	See Appendix	See Appendix
Power Equipment Operator Group 1B	See Appendix	See Appendix
Power Equipment Operator Group 2	See Appendix	See Appendix
Power Equipment Operator Group 3	See Appendix	See Appendix
Power Equipment Operator Group 4	See Appendix	See Appendix
Power Equipment Operator Group 5	See Appendix	See Appendix
Power Equipment Operator Group 6	See Appendix	See Appendix

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	$26.19	$11.19
Sheet Metal Worker	See Appendix	See Appendix
Soft Floor Layer	See Appendix	See Appendix
Sprinkler Fitter	See Appendix	See Appendix
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	See Appendix	See Appendix
Tender to Plasterer and Stucco Mason	$26.12	$12.29
Testing, Adjusting, and Balancing (TAB) Technician	See Appendix	See Appendix
Tilesetter/Terrazzo Worker: Hard Tilesetter	$29.90	$17.67
Tile, Terrazzo, and Marble Finisher	See Appendix	See Appendix
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	$37.31	$22.73
Bricklayer/Stonemason	See Appendix	See Appendix
Bridge & Highway Carpenter (See Carpenter Group 5)	$36.07	$15.26
Carpenter Group 1 & 2	See Appendix	See Appendix
Cement Mason	See Appendix	See Appendix
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	$42.22	$14.33
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	See Appendix	See Appendix
Drywall Taper (See Painter & Drywall Taper)	See Appendix	See Appendix
Electrician	See Appendix	See Appendix
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger (See Laborer Group 3)	See Appendix	See Appendix
Glazier	See Appendix	See Appendix
Hazardous Materials Handler/Mechanic	$19.71	$9.12
Highway and Parking Striper	$26.11	$8.20
Ironworker	See Appendix	See Appendix
Laborer Group 1	See Appendix	See Appendix
Laborer Group 2	See Appendix	See Appendix
Laborer Group 3	See Appendix	See Appendix
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	$30.78	$10.06
Line Constructor	See Appendix	See Appendix
Marble Setter	See Appendix	See Appendix
Millwright Group 1 & 2	$29.32	$10.68
Painter	$22.89	$7.69
Piledriver (See Carpenter Group 6)	See Appendix	See Appendix
Plasterer and Stucco Mason	See Appendix	See Appendix
Plumber/Pipefitter/Steamfitter	See Appendix	See Appendix
Power Equipment Operator Group 1	See Appendix	See Appendix
Power Equipment Operator Group 1A	See Appendix	See Appendix
Power Equipment Operator Group 1B	See Appendix	See Appendix
Power Equipment Operator Group 2	See Appendix	See Appendix
Power Equipment Operator Group 3	See Appendix	See Appendix
Power Equipment Operator Group 4	See Appendix	See Appendix
Power Equipment Operator Group 5	See Appendix	See Appendix
Power Equipment Operator Group 6	See Appendix	See Appendix

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	See Appendix	See Appendix
Sheet Metal Worker	See Appendix	See Appendix
Soft Floor Layer	$25.02	$11.16
Sprinkler Fitter	See Appendix	See Appendix
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	See Appendix	See Appendix
Tender to Plasterer and Stucco Mason	See Appendix	See Appendix
Testing, Adjusting, and Balancing (TAB) Technician	$34.14	$13.04
Tilesetter/Terrazzo Worker: Hard Tilesetter	See Appendix	See Appendix
Tile, Terrazzo, and Marble Finisher	See Appendix	See Appendix
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	$37.31	$22.73
Bricklayer/Stonemason	See Appendix	See Appendix
Bridge and Highway Carpenter (See Carpenter Group 5)	See Appendix	See Appendix
Carpenter Group 1 & 2	$31.51	$12.63
Cement Mason	See Appendix	See Appendix
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	See Appendix	See Appendix
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	See Appendix	See Appendix
Drywall Taper (See Painter & Drywall Taper)	See Appendix	See Appendix
Electrician	See Appendix	See Appendix
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger (See Laborer Group 3)	See Appendix	See Appendix
Glazier	See Appendix	See Appendix
Hazardous Materials Handler/Mechanic	See Appendix	See Appendix
Highway and Parking Striper	$26.11	$8.20
Ironworker	$33.00	$19.35
Laborer Group 1	See Appendix	See Appendix
Laborer Group 2	See Appendix	See Appendix
Laborer Group 3	See Appendix	See Appendix
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	$30.78	$10.06
Line Constructor	See Appendix	See Appendix
Marble Setter	$34.28	$19.08
Millwright Group 1 & 2	$29.32	$10.68
Painter	$22.89	$7.69
Piledriver (See Carpenter Group 6)	See Appendix	See Appendix
Plasterer and Stucco Mason	$23.81	$18.19
Plumber/Pipefitter/Steamfitter	See Appendix	See Appendix
Power Equipment Operator Group 1	See Appendix	See Appendix
Power Equipment Operator Group 1A	See Appendix	See Appendix
Power Equipment Operator Group 1B	See Appendix	See Appendix
Power Equipment Operator Group 2	See Appendix	See Appendix
Power Equipment Operator Group 3	See Appendix	See Appendix
Power Equipment Operator Group 4	See Appendix	See Appendix
Power Equipment Operator Group 5	See Appendix	See Appendix
Power Equipment Operator Group 6	See Appendix	See Appendix

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	See Appendix	See Appendix
Sheet Metal Worker	$34.44	$14.17
Soft Floor Layer	$25.02	$11.16
Sprinkler Fitter	See Appendix	See Appendix
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	See Appendix	See Appendix
Tender to Plasterer and Stucco Mason	$26.12	$12.29
Testing, Adjusting, and Balancing (TAB) Technician	See Appendix	See Appendix
Tilesetter/Terrazzo Worker: Hard Tilesetter	See Appendix	See Appendix
Tile, Terrazzo, and Marble Finisher	See Appendix	See Appendix
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	See Appendix	See Appendix
Bricklayer/Stonemason	See Appendix	See Appendix
Bridge and Highway Carpenter (See Carpenter Group 5)	See Appendix	See Appendix
Carpenter Group 1 & 2	See Appendix	See Appendix
Cement Mason	See Appendix	See Appendix
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	$42.22	$14.33
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	See Appendix	See Appendix
Drywall Taper (See Painter & Drywall Taper)	See Appendix	See Appendix
Electrician	See Appendix	See Appendix
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger (See Labor Group 3)	See Appendix	See Appendix
Glazier	See Appendix	See Appendix
Hazardous Materials Handler/Mechanic	See Appendix	See Appendix
Highway and Parking Striper	$26.11	$8.20
Ironworker	$33.00	$19.35
Laborer Group 1	See Appendix	See Appendix
Laborer Group 2	See Appendix	See Appendix
Laborer Group 3	See Appendix	See Appendix
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	$30.78	$10.06
Line Constructor	$45.93	$16.25
Marble Setter	See Appendix	See Appendix
Millwright Group 1 & 2	$29.32	$10.68
Painter	$22.89	$7.69
Piledriver	$35.95	$15.48
Plasterer and Stucco Mason	See Appendix	See Appendix
Plumber/Pipefitter/Steamfitter	See Appendix	See Appendix
Power Equipment Operator Group 1	See Appendix	See Appendix
Power Equipment Operator Group 1A	See Appendix	See Appendix
Power Equipment Operator Group 1B	See Appendix	See Appendix
Power Equipment Operator Group 2	See Appendix	See Appendix
Power Equipment Operator Group 3	See Appendix	See Appendix
Power Equipment Operator Group 4	See Appendix	See Appendix
Power Equipment Operator Group 5	See Appendix	See Appendix
Power Equipment Operator Group 6	See Appendix	See Appendix

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	$26.19	$11.19
Sheet Metal Worker	$34.44	$14.17
Soft Floor Layer	See Appendix	See Appendix
Sprinkler Fitter	$36.07	$16.41
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	See Appendix	See Appendix
Tender to Plasterer and Stucco Mason	$26.12	$12.29
Testing, Adjusting, and Balancing (TAB) Technician	$34.14	$13.04
Tilesetter/Terrazzo Worker: Hard Tilesetter	See Appendix	See Appendix
Tile, Terrazzo, and Marble Finisher	See Appendix	See Appendix
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	See Appendix	See Appendix
Bricklayer/Stonemason	See Appendix	See Appendix
Bridge and Highway Carpenter (See Carpenter Group 5)	See Appendix	See Appendix
Carpenter Group 1 & 2	$31.51	$12.63
Cement Mason	See Appendix	See Appendix
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	See Appendix	See Appendix
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	See Appendix	See Appendix
Drywall Taper (See Painter & Drywall Taper)	See Appendix	See Appendix
Electrician	See Appendix	See Appendix
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger (See Laborer Group 3)	See Appendix	See Appendix
Glazier	See Appendix	See Appendix
Hazardous Materials Handler/Mechanic	See Appendix	See Appendix
Highway and Parking Striper	$26.11	$8.20
Ironworker	$33.00	$19.35
Laborer Group 1	See Appendix	See Appendix
Laborer Group 2	See Appendix	See Appendix
Laborer Group 3	See Appendix	See Appendix
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	$30.78	$10.06
Line Constructor	See Appendix	See Appendix
Marble Setter	$34.28	$19.08
Millwright Group 1 & 2	$29.32	$10.68
Painter	$22.89	$7.69
Piledriver (See Carpenter Group 6)	See Appendix	See Appendix
Plasterer and Stucco Mason	See Appendix	See Appendix
Plumber/Pipefitter/Steamfitter	See Appendix	See Appendix
Power Equipment Operator Group 1	See Appendix	See Appendix
Power Equipment Operator Group 1A	See Appendix	See Appendix
Power Equipment Operator Group 1B	See Appendix	See Appendix
Power Equipment Operator Group 2	See Appendix	See Appendix
Power Equipment Operator Group 3	See Appendix	See Appendix
Power Equipment Operator Group 4	See Appendix	See Appendix
Power Equipment Operator Group 5	See Appendix	See Appendix
Power Equipment Operator Group 6	See Appendix	See Appendix

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	$26.19	$11.19
Sheet Metal Worker	$34.44	$14.17
Soft Floor Layer	$25.02	$11.16
Sprinkler Fitter	$36.07	$16.41
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	See Appendix	See Appendix
Tender to Plasterer and Stucco Mason	$26.12	$12.29
Testing, Adjusting, and Balancing (TAB) Technician	$34.14	$13.04
Tilesetter/Terrazzo Worker: Hard Tilesetter	$29.90	$17.67
Tile, Terrazzo, and Marble Finisher	See Appendix	See Appendix
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	See Appendix	See Appendix
Bricklayer/Stonemason	$35.03	$17.37
Bridge and Highway Carpenter (See Carpenter Group 5)	See Appendix	See Appendix
Carpenter Group 1 & 2	$31.51	$12.63
Cement Mason	$28.77	$14.17
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	See Appendix	See Appendix
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	See Appendix	See Appendix
Drywall Taper	$32.24	$13.19
Electrician	See Appendix	See Appendix
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger	$21.03	$10.45
Glazier	See Appendix	See Appendix
Hazardous Material Handler/Mechanic	$19.71	$9.12
Highway and Parking Striper	See Appendix	See Appendix
Ironworker	$33.00	$19.35
Laborer Group 1	$24.25	$10.01
Laborer Group 2	$26.56	$11.43
Laborer Group 3	$22.22	$12.73
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	$30.78	$10.06
Line Constructor	$45.93	$16.25
Marble Setter	$34.28	$19.08
Millwright Group 1 & 2	$29.32	$10.68
Painter	$22.89	$7.69
Piledriver (See Carpenter Group 6)	See Appendix	See Appendix
Plasterer and Stucco Mason	$23.81	$18.19
Plumber/Pipefitter/Steamfitter	$43.17	$24.74
Power Equipment Operator Group 1	See Appendix	See Appendix
Power Equipment Operator Group 1A	See Appendix	See Appendix
Power Equipment Operator Group 1B	See Appendix	See Appendix
Power Equipment Operator Group 2	See Appendix	See Appendix
Power Equipment Operator Group 3	See Appendix	See Appendix
Power Equipment Operator Group 4	See Appendix	See Appendix
Power Equipment Operator Group 5	See Appendix	See Appendix
Power Equipment Operator Group 6	See Appendix	See Appendix

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	$26.19	$11.19
Sheet Metal Worker	$34.44	$14.17
Soft Floor Layer	$25.02	$11.16
Sprinkler Fitter	$36.07	$16.41
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	$28.57	$12.55
Tender to Plasterer and Stucco Mason	$26.12	$12.29
Testing, Adjusting, and Balancing (TAB) Technician	$34.14	$13.04
Tilesetter/Terrazzo Worker: Hard Tilesetter	$29.90	$17.67
Tile, Terrazzo, and Marble Finisher	See Appendix	See Appendix
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	$37.31	$22.73
Bricklayer/Stonemason	See Appendix	See Appendix
Bridge and Highway Carpenter	$36.07	$15.26
Carpenter Group 1 & 2	$31.51	$12.63
Cement Mason	$28.77	$14.17
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	$42.22	$14.33
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	See Appendix	See Appendix
Drywall Taper (See Painter & Drywall Taper)	See Appendix	See Appendix
Electrician	See Appendix	See Appendix
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger	$21.03	$10.45
Glazier	See Appendix	See Appendix
Hazardous Materials Handler/Mechanic	$19.71	$9.12
Highway and Parking Striper	$26.11	$8.20
Ironworker	See Appendix	See Appendix
Laborer Group 1	$24.25	$10.01
Laborer Group 2	$26.56	$11.43
Laborer Group 3	$22.22	$12.73
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	See Appendix	See Appendix
Line Constructor	$45.93	$16.25
Marble Setter	$34.28	$19.08
Millwright Group 1 & 2	$29.32	$10.68
Painter	$22.89	$7.69
Piledriver (See Carpenter Group 6)	See Appendix	See Appendix
Plasterer and Stucco Mason	$23.81	$18.19
Plumber/Pipefitter/Steamfitter	See Appendix	See Appendix
Power Equipment Operator Group 1	See Appendix	See Appendix
Power Equipment Operator Group 1A	See Appendix	See Appendix
Power Equipment Operator Group 1B	See Appendix	See Appendix
Power Equipment Operator Group 2	See Appendix	See Appendix
Power Equipment Operator Group 3	See Appendix	See Appendix
Power Equipment Operator Group 4	See Appendix	See Appendix
Power Equipment Operator Group 5	See Appendix	See Appendix
Power Equipment Operator Group 6	See Appendix	See Appendix

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	$26.19	$11.19
Sheet Metal Worker	See Appendix	See Appendix
Soft Floor Layer	$25.02	$11.16
Sprinkler Fitter	See Appendix	See Appendix
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	See Appendix	See Appendix
Tender to Plasterer and Stucco Mason	See Appendix	See Appendix
Testing, Adjusting, and Balancing (TAB) Technician	$34.14	$13.04
Tilesetter/Terrazzo Worker: Hard Tilesetter	See Appendix	See Appendix
Tile, Terrazzo, and Marble Finisher	$22.99	$14.00
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	See Appendix	See Appendix
Bricklayer/Stonemason	$35.03	$17.37
Bridge and Highway Carpenter	$36.07	$15.26
Carpenter Group 1 & 2	$31.51	$12.63
Cement Mason	$28.77	$14.17
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	See Appendix	See Appendix
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	$34.31	$15.27
Drywall Taper	$32.24	$13.19
Electrician	See Appendix	See Appendix
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger	$21.03	$10.45
Glazier	See Appendix	See Appendix
Hazardous Materials Handler/Mechanic	$19.71	$9.12
Highway and Parking Striper	$26.11	$8.20
Ironworker	$33.00	$19.35
Laborer Group 1	$24.25	$10.01
Laborer Group 2	$26.56	$11.43
Laborer Group 3	$22.22	$12.73
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	$30.78	$10.06
Line Constructor	See Appendix	See Appendix
Marble Setter	See Appendix	See Appendix
Millwright Group 1 & 2	$29.32	$10.68
Painter	$22.89	$7.69
Piledriver (See Carpenter Group 6)	See Appendix	See Appendix
Plasterer and Stucco Mason	$23.81	$18.19
Plumber/Pipefitter/Steamfitter	See Appendix	See Appendix
Power Equipment Operator Group 1	See Appendix	See Appendix
Power Equipment Operator Group 1A	See Appendix	See Appendix
Power Equipment Operator Group 1B	See Appendix	See Appendix
Power Equipment Operator Group 2	See Appendix	See Appendix
Power Equipment Operator Group 3	See Appendix	See Appendix
Power Equipment Operator Group 4	See Appendix	See Appendix
Power Equipment Operator Group 5	See Appendix	See Appendix
Power Equipment Operator Group 6	See Appendix	See Appendix

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	$26.19	$11.19
Sheet Metal Worker	$34.44	$14.17
Soft Floor Layer	$25.02	$11.16
Sprinkler Fitter	See Appendix	See Appendix
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	$28.57	$12.55
Tender to Plasterer and Stucco Mason	$26.12	$12.29
Testing, Adjusting, and Balancing (TAB) Technician	$34.14	$13.04
Tilesetter/Terrazzo Worker: Hard Tilesetter	$29.90	$17.67
Tile, Terrazzo, and Marble Finisher	$22.99	$14.00
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	$37.31	$22.73
Bricklayer/Stonemason	$35.03	$17.37
Bridge and Highway Carpenter (See Carpenter Group 5)	See Appendix	See Appendix
Carpenter Group 1 & 2	$31.51	$12.63
Cement Mason	$28.77	$14.17
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	See Appendix	See Appendix
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	$34.31	$15.27
Drywall Taper	$32.24	$13.19
Electrician	See Appendix	See Appendix
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger (See Laborer Group 3)	See Appendix	See Appendix
Glazier	See Appendix	See Appendix
Hazardous Materials Handler/Mechanic	$19.71	$9.12
Highway and Parking Striper	See Appendix	See Appendix
Ironworker	See Appendix	See Appendix
Laborer Group 1	See Appendix	See Appendix
Laborer Group 2	See Appendix	See Appendix
Laborer Group 3	See Appendix	See Appendix
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	See Appendix	See Appendix
Line Constructor	See Appendix	See Appendix
Marble Setter	See Appendix	See Appendix
Millwright Group 1 & 2 (See Carpenter Group 3 & 4)	See Appendix	See Appendix
Painter	$22.89	$7.69
Piledriver (See Carpenter Group 5)	See Appendix	See Appendix
Plasterer and Stucco Mason	See Appendix	See Appendix
Plumber/Pipefitter/Steamfitter	See Appendix	See Appendix
Power Equipment Operator Group 1	See Appendix	See Appendix
Power Equipment Operator Group 1A	See Appendix	See Appendix
Power Equipment Operator Group 1B	See Appendix	See Appendix
Power Equipment Operator Group 2	See Appendix	See Appendix
Power Equipment Operator Group 3	See Appendix	See Appendix
Power Equipment Operator Group 4	See Appendix	See Appendix
Power Equipment Operator Group 5	See Appendix	See Appendix
Power Equipment Operator Group 6	See Appendix	See Appendix

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	$26.19	$11.19
Sheet Metal Worker	See Appendix	See Appendix
Soft Floor Layer	$25.02	$11.16
Sprinkler Fitter	$36.07	$16.41
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	See Appendix	See Appendix
Tender to Plasterer and Stucco Mason	$26.12	$12.29
Testing, Adjusting, and Balancing (TAB) Technician	$34.14	$13.04
Tilesetter/Terrazzo Worker: Hard Tilesetter	See Appendix	See Appendix
Tile, Terrazzo, and Marble Finisher	See Appendix	See Appendix
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	$37.31	$22.73
Bricklayer/Stonemason	$35.03	$17.37
Bridge and Highway Carpenter (See Carpenter Group 5)	See Appendix	See Appendix
Carpenter Group 1 & 2	$31.51	$12.63
Cement Mason	$28.77	$14.17
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	See Appendix	See Appendix
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	$34.31	$15.27
Drywall Taper	$32.24	$13.19
Electrician	See Appendix	See Appendix
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger	$21.03	$10.45
Glazier	$35.65	$17.38
Hazardous Materials Handler/Mechanic	$19.71	$9.12
Highway and Parking Striper	$26.11	$8.20
Ironworker	See Appendix	See Appendix
Laborer Group 1	$24.25	$10.01
Laborer Group 2	$26.56	$11.43
Laborer Group 3	$22.22	$12.73
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	$30.78	$10.06
Line Constructor	See Appendix	See Appendix
Marble Setter	$34.28	$19.08
Millwright Group 1 & 2	$29.32	$10.68
Painter	$22.89	$7.69
Piledriver (See Carpenter Group 6)	See Appendix	See Appendix
Plasterer and Stucco Mason	$23.81	$18.19
Plumber/Pipefitter/Steamfitter	See Appendix	See Appendix
Power Equipment Operator Group 1	See Appendix	See Appendix
Power Equipment Operator Group 1A	See Appendix	See Appendix
Power Equipment Operator Group 1B	See Appendix	See Appendix
Power Equipment Operator Group 2	See Appendix	See Appendix
Power Equipment Operator Group 3	See Appendix	See Appendix
Power Equipment Operator Group 4	See Appendix	See Appendix
Power Equipment Operator Group 5	See Appendix	See Appendix
Power Equipment Operator Group 6	See Appendix	See Appendix

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	$26.19	$11.19
Sheet Metal Worker	See Appendix	See Appendix
Soft Floor Layer	$25.02	$11.16
Sprinkler Fitter	See Appendix	See Appendix
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	See Appendix	See Appendix
Tender to Plasterer and Stucco Mason	$26.12	$12.29
Testing, Adjusting, and Balancing (TAB) Technician	$34.14	$13.04
Tilesetter/Terrazzo Worker: Hard Tilesetter	$29.90	$17.67
Tile, Terrazzo, and Marble Finisher	See Appendix	See Appendix
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	See Appendix	See Appendix
Bricklayer/Stonemason	$35.03	$17.37
Bridge and Highway Carpenter	$36.07	$15.26
Carpenter Group 1 & 2	$31.51	$12.63
Cement Mason	$28.77	$14.17
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	See Appendix	See Appendix
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	$34.31	$15.27
Drywall Taper	$32.24	$13.19
Electrician	See Appendix	See Appendix
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructors (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger (See Laborer Group 3)	See Appendix	See Appendix
Glazier	$35.65	$17.38
Hazardous Materials Handler/Mechanic	$19.71	$9.12
Highway and Parking Striper	$26.11	$8.20
Ironworker	$33.00	$19.35
Laborer Group 1	See Appendix	See Appendix
Laborer Group 2	See Appendix	See Appendix
Laborer Group 3	See Appendix	See Appendix
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	$30.78	$10.06
Line Constructor	See Appendix	See Appendix
Marble Setter	See Appendix	See Appendix
Millwright Group 1 & 2	$29.32	$10.68
Painter	$22.89	$7.69
Piledriver	$35.95	$15.48
Plasterer and Stucco Mason	$23.81	$18.19
Plumber/Pipefitter/Steamfitter	$43.17	$24.74
Power Equipment Operator Group 1	See Appendix	See Appendix
Power Equipment Operator Group 1A	See Appendix	See Appendix
Power Equipment Operator Group 1B	See Appendix	See Appendix
Power Equipment Operator Group 2	See Appendix	See Appendix
Power Equipment Operator Group 3	See Appendix	See Appendix
Power Equipment Operator Group 4	See Appendix	See Appendix
Power Equipment Operator Group 5	See Appendix	See Appendix
Power Equipment Operator Group 6	See Appendix	See Appendix

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	$26.19	$11.19
Sheet Metal Worker	$34.44	$14.17
Soft Floor Layer	$25.02	$11.16
Sprinkler Fitter	$36.07	$16.41
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	$28.57	$12.55
Tender to Plasterer and Stucco Mason	$26.12	$12.29
Testing, Adjusting, and Balancing (TAB) Technician	$34.14	$13.04
Tilesetter/Terrazzo Worker: Hard Tilesetter	$29.90	$17.67
Tile, Terrazzo, and Marble Finisher	$22.99	$14.00
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	See Appendix	See Appendix
Bricklayer/Stonemason	See Appendix	See Appendix
Bridge and Highway Carpenter (See Carpenter Group 5)	See Appendix	See Appendix
Carpenter Group 1 & 2	See Appendix	See Appendix
Cement Mason	See Appendix	See Appendix
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	See Appendix	See Appendix
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	See Appendix	See Appendix
Drywall Taper	$32.24	$13.19
Electrician	See Appendix	See Appendix
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger (See Laborer Group 3)	See Appendix	See Appendix
Glazier	$35.65	$17.38
Hazardous Materials Handler/Mechanic	See Appendix	See Appendix
Highway and Parking Striper	See Appendix	See Appendix
Ironworker	See Appendix	See Appendix
Laborer Group 1	See Appendix	See Appendix
Laborer Group 2	See Appendix	See Appendix
Laborer Group 3	See Appendix	See Appendix
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	$30.78	$10.06
Line Constructor	See Appendix	See Appendix
Marble Setter	See Appendix	See Appendix
Millwright Group 1 & 2	$29.32	$10.68
Painter	$22.89	$7.69
Piledriver (See Carpenter Group 6)	See Appendix	See Appendix
Plasterer and Stucco Mason	$23.81	$18.19
Plumber/Pipefitter/Steamfitter	See Appendix	See Appendix
Power Equipment Operator Group 1	See Appendix	See Appendix
Power Equipment Operator Group 1A	See Appendix	See Appendix
Power Equipment Operator Group 1B	See Appendix	See Appendix
Power Equipment Operator Group 2	See Appendix	See Appendix
Power Equipment Operator Group 3	See Appendix	See Appendix
Power Equipment Operator Group 4	See Appendix	See Appendix
Power Equipment Operator Group 5	See Appendix	See Appendix
Power Equipment Operator Group 6	See Appendix	See Appendix

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	$26.19	$11.19
Sheet Metal Worker	See Appendix	See Appendix
Soft Floor Layer	$25.02	$11.16
Sprinkler Fitter	See Appendix	See Appendix
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	See Appendix	See Appendix
Tender to Plasterer and Stucco Mason	$26.12	$12.29
Testing, Adjusting, and Balancing (TAB) Technician	See Appendix	See Appendix
Tilesetter/Terrazzo Worker: Hard Tilesetter	$29.90	$17.67
Tile, Terrazzo, and Marble Finisher	See Appendix	See Appendix
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	$37.31	$22.73
Bricklayer/Stonemason	See Appendix	See Appendix
Bridge and Highway Carpenter (See Carpenter Group 5)	See Appendix	See Appendix
Carpenter Group 1 & 2	$31.51	$12.63
Cement Mason	$28.77	$14.17
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	See Appendix	See Appendix
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	$34.31	$15.27
Drywall Taper	$32.24	$13.19
Electrician	$40.94	$17.99
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger	$21.03	$10.45
Glazier	See Appendix	See Appendix
Hazardous Materials Handler/Mechanic	$19.71	$9.12
Highway and Parking Striper	$26.11	$8.20
Ironworker	$33.00	$19.35
Laborer Group 1	$24.25	$10.01
Laborer Group 2	$26.56	$11.43
Laborer Group 3	$22.22	$12.73
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	$30.78	$10.06
Line Constructor	$45.93	$16.25
Marble Setter	See Appendix	See Appendix
Millwright Group 1 & 2	$29.32	$10.68
Painter	$22.89	$7.69
Piledriver (See Carpenter Group 6)	See Appendix	See Appendix
Plasterer and Stucco Mason	$23.81	$18.19
Plumber/Pipefitter/Steamfitter	See Appendix	See Appendix
Power Equipment Operator Group 1	$38.50	$14.27
Power Equipment Operator Group 1A	$42.96	$14.67
Power Equipment Operator Group 1B	$47.13	$14.21
Power Equipment Operator Group 2	$33.07	$12.72
Power Equipment Operator Group 3	$31.79	$11.18
Power Equipment Operator Group 4	$31.82	$10.98
Power Equipment Operator Group 5	$30.93	$10.49
Power Equipment Operator Group 6	$27.70	$11.98

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	$26.19	$11.19
Sheet Metal Worker	See Appendix	See Appendix
Soft Floor Layer	$25.02	$11.16
Sprinkler Fitter	$36.07	$16.41
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	$28.57	$12.55
Tender to Plasterer and Stucco Mason	$26.12	$12.29
Testing, Adjusting, and Balancing (TAB) Technician	$34.14	$13.04
Tilesetter/Terrazzo Worker: Hard Tilesetter	$29.90	$17.67
Tile, Terrazzo, and Marble Finisher	See Appendix	See Appendix
Truck Driver – All Groups	$22.25	$6.74

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Asbestos Worker/Insulator	See Appendix	See Appendix
Boilermaker	See Appendix	See Appendix
Bricklayer/Stonemason	$35.03	$17.37
Bridge and Highway Carpenter	$36.07	$15.26
Carpenter Group 1 & 2	$31.51	$12.63
Cement Mason	$28.77	$14.17
Diver	See Appendix	See Appendix
Diver Tender	See Appendix	See Appendix
Dredger	See Appendix	See Appendix
Drywall, Lather, Acoustical Carpenter & Ceiling Installer	$34.31	$15.27
Drywall Taper	$32.24	$13.19
Electrician	$40.94	$17.99
Elevator Constructor, Installer and Mechanic	See Appendix	See Appendix
Fence Constructor (Non-metal)	$25.07	$10.33
Fence Erector (Metal)	$20.50	$5.09
Flagger	$21.03	$10.45
Glazier	$35.65	$17.38
Hazardous Materials Handler/Mechanic	$19.71	$9.12
Highway and Parking Striper	$26.11	$8.20
Ironworker	$33.00	$19.35
Laborer Group 1	$24.25	$10.01
Laborer Group 2	$26.56	$11.43
Laborer Group 3	$22.22	$12.73
Landscape Laborer/Technician	$18.54	$4.82
Limited Energy Electrician	$30.78	$10.06
Line Constructor	See Appendix	See Appendix
Marble Setter	See Appendix	See Appendix
Millwright Group 1 & 2	$29.32	$10.68
Painter	$22.89	$7.69
Piledriver	$35.95	$15.48
Plasterer and Stucco Mason	$23.81	$18.19
Plumber/Pipefitter/Steamfitter	$43.17	$24.74
Power Equipment Operator Group 1	$38.50	$14.27
Power Equipment Operator Group 1A	$42.96	$14.67
Power Equipment Operator Group 1B	$47.13	$14.21
Power Equipment Operator Group 2	$33.07	$12.72
Power Equipment Operator Group 3	$31.79	$11.18
Power Equipment Operator Group 4	$31.82	$10.98
Power Equipment Operator Group 5	$30.93	$10.49
Power Equipment Operator Group 6	$27.70	$11.98

Using the booklet, Definitions of Covered Occupations, find the definition that most closely matches the actual work being performed by the worker.

OCCUPATION	BASIC HOURLY RATE	FRINGE RATE
Roofer	$26.19	$11.19
Sheet Metal Worker	$34.44	$14.17
Soft Floor Layer	$25.02	$11.16
Sprinkler Fitter	See Appendix	See Appendix
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier)	$28.57	$12.55
Tender to Plasterer and Stucco Mason	$26.12	$12.29
Testing, Adjusting, and Balancing (TAB) Technician	$34.14	$13.04
Tilesetter/Terrazzo Worker: Hard Tilesetter	$29.90	$17.67
Tile, Terrazzo, and Marble Finisher	See Appendix	See Appendix
Truck Driver – All Groups	$22.25	$6.74

APPENDIX

JULY 1, 2019

Collectively Bargained Rates

(To be used only when referred to in the Regions pages 6-33)

JULY 1, 2019 APPENDIX

The Appendix rates are Collectively Bargained Rates to be used ONLY for Regions/Trades specified in pages 6 through 33. Refer to pages 6 through 33 BEFORE using rates in this section.
Rates in this section may include premium pay such as shift differential, hazard pay and/or a zone pay differential which is added to the hourly base rate.

Using the booklet, Definitions of Covered Occupations, find the definition and group number, if applicable, that most closely matches the actual work being performed by the worker.

Asbestos Worker/Insulator 38
Boilermaker 38
Bricklayer/Stonemason 38
Bridge and Highway Carpenter (See Carpenter Group 5) 38
Carpenter 38
Cement Mason 39
Diver 39
Diver Tender 39
Dredger 40
Drywall, Lather, Acoustical Carpenter & Ceiling Installer 40
Drywall Taper (See Painter & Drywall Taper) 45
Electrician 41
Elevator Constructor, Installer and Mechanic 43
Glazier 43
Hazardous Materials Handler 43
Highway/Parking Striper 43
Ironworker 43
Laborer 43
Limited Energy Electrician 44
Line Constructor 45
Marble Setter 45
Millwright Group 1 & 2 (See Carpenter Group 3 & 4) 38
Painter 45
Piledriver (See Carpenter Group 6) 38
Plasterer and Stucco Mason 45
Plumber/Pipefitter/Steamfitter 46
Power Equipment Operator 46
Roofer 48
Sheet Metal Worker 48
Soft Floor Layer 49
Sprinkler Fitter 49
Tender to Mason Trades (Brick and Stonemason, Mortar Mixer, Hod Carrier) 49
Tender to Plasterer and Stucco Mason 49
Testing and Balancing (TAB) Technician 50
Tilesetter/Terrazzo Worker: Hard Tilesetter 50
Tile, Terrazzo, and Marble Finisher 50
Truck Driver 50

MAP: Power Equipment Operator, Zone 1 51

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE
ASBESTOS WORKER/INSULATOR		
	50.67	**22.37**
Firestop Containment	**34.91**	**15.91**
BOILERMAKER	**38.56**	**30.33**
BRICKLAYER/STONEMASON		
	40.00	**20.32**

(This trade is tended by "Tenders to Mason Trades")

(Add $1.00 per hour to Fringe for Refractory repair work)

CARPENTER

Zone A (Base Rate)

Group 1	**37.64**	**16.83**
Group 2	**37.79**	**16.83**
Group 3	**38.17**	**16.83**
Group 4	**38.35**	**16.83**
Group 5	**38.17**	**16.83**
Group 6	**38.71**	**16.83**

Zone Differential for Carpenters
(Add to Zone A Base Rate)

Zone B	**1.25** per hour
Zone C	**1.70** per hour
Zone D	**2.00** per hour
Zone E	**3.00** per hour
Zone F	**5.00** per hour
Zone G	**10.00** per hour

Zone A: Projects located within 30 miles of the respective city hall of the cities listed.
Zone B: More than 30 miles but less than 40 miles.
Zone C: More than 40 miles but less than 50 miles.
Zone D: More than 50 miles but less than 60 miles.
Zone E: More than 60 miles but less than 70 miles.
Zone F: More than 70 miles but less than 100 miles.
Zone G: More than 100 miles.

CARPENTER (continued)

Reference Cities for Group 1 and 2 Carpenters

Albany	Goldendale	Madras	Roseburg
Astoria	Grants Pass	Medford	Salem
Baker City	Hermiston	Newport	The Dalles
Bend	Hood River	Ontario	Tillamook
Brookings	Klamath Falls	Pendleton	Vancouver
Burns	La Grande	Portland	
Coos Bay	Lakeview	Port Orford	
Eugene	Longview	Reedsport	

Group 3 (Millwright Group-I)
Group 4 (Millwright Group-II)

Zones for Groups 3 and 4 Carpenter are determined by the distance between the project site and **either**

1) The worker's residence; ***or***

2) City Hall of a reference city listed for the appropriate group shown, whichever is closer

Reference Cities for Group 3 and 4 Carpenters

Eugene	Medford	Portland	Vancouver
Longview	North Bend	The Dalles	

Group 5 (Bridge & Highway Carpenter)
Group 6 (Piledriver)

Zones for Groups 5 and 6 Carpenter are determined by the distance between the project site and **either**

1) The worker's residence; ***or***

2) City Hall of a reference city listed for the appropriate group shown, whichever is closer

Reference Cities for Group 5 and 6 Carpenters

Bend	Longview	North Bend
Eugene	Medford	Portland

Note: All job or project locations shall be computed (determined) on the basis of road miles and in the following manner. A mileage measurement will start at the entrance to the respective city hall, facing the project (if possible), and shall proceed by the normal route (shortest time, best road) to the geographical center on the highway, railroad, and street construction projects (end of measurement). On all project contracts, the geographical center where the major portion of the construction is located, shall be considered the center of the project (end measurement).

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE	TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE

CARPENTER (continued)

Welders receive $1.75/hour above their group's rate with an eight (8) hour minimum.

When working with creosote and other toxic, treated wood and steel material, workers shall receive $.25/hour premium pay for minimum of eight (8) hours.

When working in sheet pile coffer dams or cells up to the external water level, Group 6 workers shall receive $.15/hour premium pay for minimum of eight (8) hours.

CEMENT MASON

(This trade is tended by "Concrete Laborer")

Base Rate

Group 1	**32.10**	**20.17**
Group 2	**32.80**	**20.17**
Group 3	**32.80**	**20.17**
Group 4	**33.50**	**20.17**

Zone Differential for Cement Mason
(Add to Basic Hourly Rate)

Zone A	**3.00** per hour
Zone B	**5.00** per hour
Zone C	**10.00** per hour

Zone A: Projects located 60-79 miles of the respective city hall of the Reference Cities listed below.
Zone B: Projects located 80-99 miles of the respective city hall of the Reference Cities listed below.
Zone C: Projects located 100 or more miles of the respective city hall of the Reference Cities listed below.

Reference Cities for Zones A-C (Cement Mason)

Bend	Eugene	Portland	The Dalles
Corvallis	Medford	Salem	Vancouver

When a contractor takes current employees to a project that is located more than 59 miles from the city hall of the Reference City that is closest to the contractor's place of business, Zone Pay is to be paid for the distance between the city hall of the identified Reference City and the project site.

"Contractor's place of business" shall include not only contractor's principal place of business but also contractor's area office(s) that support contractor's operations in a geographical region. Such area office(s) shall not include project offices(s) established for the duration of a particular project.

CEMENT MASON (continued)

Note: All miles are to be determined on the basis of road miles using the normal route (shortest time – best road), from the city hall of the Reference City closest to the contractor's place of business and the project.

DIVER & DIVER TENDER

Zone 1 (Base Rate)

DIVER	**87.73**	**16.83**
DIVER TENDER	**43.73**	**16.83**

1) For those workers who reside within a reference city below, their zone pay shall be computed from the city hall of the city wherein they reside.

2) For those workers who reside nearer to a project than is the city hall of any reference city below, the mileage from their residence may be used in computing their zone pay differential.

3) The zone pay for all other projects shall be computed from the city hall of Portland.

Zone Differential for Diver/Diver Tender
(Add to Zone 1 Base Rate)

Zone 2	**.85** per hour
Zone 3	**1.25** per hour
Zone 4	**1.70** per hour
Zone 5	**2.00** per hour
Zone 6	**3.00** per hour
Zone 7	**5.00** per hour

Zone 1: Projects located within 30 miles of city hall of the reference cities listed.
Zone 2: More than 30 miles, but less than 40 miles.
Zone 3: More than 40 miles, but less than 50 miles.
Zone 4: More than 50 miles, but less than 60 miles.
Zone 5: More than 60 miles, but less than 70 miles.
Zone 6: More than 70 miles, but less than 100 miles.
Zone 7: More than 100 miles from the city hall of employee's home local.

Reference Cities for Diver/Diver Tender

Astoria	Klamath Falls	Newport	Roseburg
Bend	Longview	North Bend	Salem
Eugene	Medford	Portland	The Dalles

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE

DIVER & DIVER TENDER (continued)

Note: All job or project locations shall be computed (determined) on the basis of road miles and in the following manner. A mileage measurement will start at the entrance to the respective city hall, facing the project (if possible), and shall proceed by the normal route (shortest time, best road) to the geographical center on the highway, railroad, and street construction projects (end of measurement). On all project contracts, the geographical center where the major portion of the construction is located, shall be considered the center of the project (end measurement).

Depth Pay and Enclosure Pay are added to the Divers' Basic Hourly Rate to obtain the Total Hourly Rate for the Diver.

Basic Hourly Rate	+	Hourly Depth Pay	+	Hourly Enclosure Pay	=	Diver Total Hourly Pay Rate

Diver Depth Pay:

Depth of Dive	Hourly Depth Pay
50-100 ft.	$2.00 per foot over 50 feet
101-150 ft.	$3.00 per foot over 100 feet
151-220 ft.	$4.00 per foot over 150 feet
Over 220 ft.	$5.00 per foot over 220 ft.

Depth shall be figured from the surface to the actual depth where the diving work is being performed.

Diver Enclosure Pay (working without vertical escape):

Distance Traveled In the Enclosure	Hourly Enclosure Pay
0 - 25ft.	N/C
25 - 300 ft.	$1.00 per foot from the entrance
300 - 600 ft.	$1.50 per foot beginning at 300 ft.
Over 600 ft.	$2.00 per foot beginning at 600 ft.

DREDGER

Zone A (Base Rate)

	HOURLY BASE RATE	HOURLY FRINGE RATE
Leverman (Hydraulic & Clamshell)	**45.96**	**14.35**
Assistant Engineer (Watch Engineer, Mechanic Machinist)	**42.80**	**14.35**
Tenderman (Boatman Attending Dredge Plant) Fireman	**41.31**	**14.35**
Fill Equipment Operator	**40.14**	**14.35**
Assistant Mate	**37.44**	**14.35**

Zone Differential for Dredgers
(Add to Zone A Base Rate)

Zone B **3.00** per hour
Zone C **6.00** per hour

Zone mileage based on road miles:

Zone A: Center of jobsite to no more than 30 miles from the city hall of Portland.
Zone B: More than 30 miles but not more than 60 miles.
Zone C: Over 60 miles.

DRYWALL, LATHER, ACOUSTICAL CARPENTER & CEILING INSTALLER

Zone 1 (Base Rate)

	HOURLY BASE RATE	HOURLY FRINGE RATE
1. DRYWALL INSTALLER	**37.93**	**16.54**
2. LATHER, ACOUSTICAL CARPENTER & CEILING INSTALLER	**37.93**	**16.54**

See Zone Differential on page 41

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE	TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE

DRYWALL, LATHER, ACOUSTICAL CARPENTER & CEILING INSTALLER (continued)

Zone Differential for Drywall, Lather, Acoustical Carpenter & Ceiling Installer
(Add to Zone 1 Base Rate)

Zone mileage based on road miles:

Zone B	31-40 miles	**1.25** per hour
Zone C	41-50 miles	**1.70** per hour
Zone D	51-60 miles	**2.00** per hour
Zone E	61-70 miles	**3.00** per hour
Zone F	71-100 miles	**5.00** per hour
Zone G	101 or more	**10.00** per hour

The correct transportation allowance shall be based on road mileage from the City Hall of the local union having jurisdiction of the job or other transportation reference cities herein listed.

Reference Cities for Drywall, Lather, Acoustical Carpenter & Ceiling Installer

Albany	Coquille	Medford	Roseburg
Astoria	Eugene	Newport	Salem
Baker	Grants Pass	North Bend	Seaside
Bandon	Hermiston	Pendleton	The Dalles
Bend	Klamath Falls	Portland	Tillamook
Brookings	Kelso-Longview	Reedsport	Vancouver

ELECTRICIAN

Area 1

Electrician	**31.65**	**15.16**
Cable Splicer	**34.82**	**15.34**

Reference Counties Area 1

Malheur

Area 2

Electrician	**46.05**	**21.06**
Cable Splicer	**48.35**	**21.13**

Reference Counties Area 2

Baker	Grant	Umatilla	Wallowa
Gilliam	Morrow	Union	Wheeler

Add 50% of the base rate when workers are required to work under the following conditions:

ELECTRICIAN (continued)

1) Under compressed air with atmospheric pressure exceeding normal pressure by at least 10%.

2) From trusses, swing scaffolds, bosun's chairs, open platforms, unguarded scaffolds, open ladders, frames, tanks, stacks, silos and towers where the workman is subject to a direct fall of (a) more than 60 feet or (b) into turbulent water under bridges, powerhouses or spillway faces of dams.

Area 3

Electrician	**40.00**	**19.55**

Reference Counties Area 3

Coos	Douglas (a)	Lincoln
Curry	Lane (a)	

(a) Those portions of Lane and Douglas lying **west** of a line running North and South from the NE corner of Coos County to the SE corner of Lincoln County.

Shift Differential

1st Shift "day"	Between the hours of 8:00am and 4:30pm	8 hours pay for 8 hours work
2nd Shift "swing"	Between the hours of 4:30pm and 1:00am	8 hours pay for 8 hours work plus 17% for all hours worked
3rd Shift "graveyard"	Between the hours of 12:30am and 9:00am	8 hours pay for 8 hours work plus 31% for all hours worked.

When workers are required to work under compressed air or where gas masks are required, or to work from trusses, all scaffolds including mobile elevated platforms, any temporary structure, bosun's chair or on frames, stacks, towers, tanks, within 15' of the leading edges of any building at a distance of:

50 – 75 feet to the ground	Add 1 ½ x the base rate
75+ feet to the ground	Add 2 x the base rate

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE

ELECTRICIAN (continued)

High Time is not required to be paid on any permanent structure with permanent adequate safeguards (handrails, mid-rails, and toe guards). Any vehicle equipped with outriggers are exempted from this section.

Area 4

Electrician	**43.55**	**19.25**
Cable Splicer	**47.91**	**19.38**
Lighting Maintenance/ Material Handlers	**19.57**	**9.84**

Reference Counties Area 4

Benton	Jefferson	Marion
Crook	Lane (b)	Polk
Deschutes	Linn	Yamhill (c)

(b) That portion of Lane County lying **east** of a line running North and South from the NE corner of Coos County to the SE corner of Lincoln County.

(c) South half

Shift Differential

1st Shift "day"	Between the hours of 8:00am and 4:30pm	8 hours pay for 8 hours work
2nd Shift "swing"	Between the hours of 4:30pm and 1:00am	8 hours pay for 8 hours work plus 17% for all hours worked
3rd Shift "graveyard"	Between the hours of 12:30am and 9:00am	8 hours pay for 8 hours work plus 31.4% for all hours worked.

Area 5

Electrician	**44.85**	**24.87**
Electrical Welder	**49.34**	**25.00**
Material Handler/ Lighting Maintenance	**25.56**	**16.44**

Reference Counties Area 5

Clackamas	Hood River	Tillamook	Yamhill (d)
Clatsop	Multnomah	Wasco	
Columbia	Sherman	Washington	

(d) North Half

ELECTRICIAN (continued)

Shift Differential

1st Shift "day"	Between the hours of 8:00am and 4:30pm	8 hours pay for 8 hours work
2nd Shift "swing"	Between the hours of 4:30pm and 1:00am	8 hours pay for 8 hours work plus 17.3% for all hours worked
3rd Shift "graveyard"	Between the hours of 12:30am and 9:00am	8 hours pay for 8 hours work plus 31.4% for all hours worked.

Zone Pay for Area 5 **Electrician and Electrical Welder**
(Add to Basic Hourly Rate)

Zone mileage based on air miles:

Zone 1	31-50 miles	**1.50** per hour
Zone 2	51-70 miles	**3.50** per hour
Zone 3	71-90 miles	**5.50** per hour
Zone 4	Beyond 90	**9.00** per hour

There shall be a 30-mile free zone from downtown Portland City Hall and a similar 15-mile free zone around the following cities:

Astoria	Seaside	Tillamook
Hood River	The Dalles	

Further, the free zone at the Oregon coast shall extend along Hwy 101 west to the ocean Hwy 101 east 10 miles if not already covered by the above 15-mile free zone.

Area 6

Electrician	**35.19**	**16.80**
Lighting Maintenance and Material Handlers	**16.97**	**9.76**

Reference Counties Area 6

Douglas (e)	Jackson	Klamath
Harney	Josephine	Lake

(e) That portion of Douglas County lying **east** of a line running North and South from the NE corner of Coos County to the SE corner of Lincoln County.

See Shift Differential on page 43

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE

ELECTRICIAN (continued)

Shift Differential

1st Shift "day"	Between the hours of 8:00am and 4:30pm	8 hours pay for 8 hours work
2nd Shift "swing"	Between the hours of 4:30pm and 1:00am	8 hours pay for 8 hours work plus 7.5% for all hours worked
3rd Shift "graveyard"	Between the hours of 12:30am and 9:00am	8 hours pay for 8 hours work plus 15% for all hours worked.

When workers are required to work under compressed air or to work from trusses, scaffolds, swinging scaffolds, bosun's chair or on building frames, stacks or towers at a distance of 50 to 90 feet from the ground or supporting structures shall be paid 1-1/2 times the base rate of pay.

ELEVATOR CONSTRUCTOR, INSTALLER AND MECHANIC

Area 1

Mechanic **54.09** **39.72**

Reference Counties Area 1

Baker Umatilla Union Wallowa

Area 2

Mechanic **54.32** **39.74**

Reference Counties Area 2

All remaining Counties

GLAZIER **39.15** **22.62**

(Add $1.00 to base rate if safety belt is required by State safety regulations)

(Add $4.00 to base rate for work done from a non-motorized single-man bosun chair)

HAZARDOUS MATERIALS HANDLER

25.03 **12.68**

HIGHWAY/PARKING STRIPER

35.22 **12.90**

Shift Differential

(Add $1.85 to base rate for shifts that start between 3:00pm and 4:00am)

IRONWORKER

Zone 1 (Base Rate): **37.00** **25.87**

Zone Differential for Ironworker
(Add to Basic Hourly Rate)

Zone 2 **5.00/**hr. or $40.00 maximum per day
Zone 3 **8.13**/hr. or $65.00 maximum per day
Zone 4 **10.63/**hr. or $85.00 maximum per day

Zone 1: Projects located within 45 miles of city hall in the reference cities listed below.
Zone 2: More than 45 miles, but less than 60 miles.
Zone 3: More than 60 miles, but less than 100 miles.
Zone 4: More than 100 miles.

Note: Zone pay for Ironworkers shall be determined using AAA road mileage computed from the city hall or dispatch center of the reference cities listed below **or** the residence of the employee, whichever is nearer to the project.

Reference Cities and Dispatch Center

Medford Portland

LABORER

Zone A (Base Rate):

Group 1	**30.82**	**14.57**
Group 2	**31.97**	**14.57**
Group 3	**26.72**	**14.57**

Note: A Hazardous Waste Removal Differential must be added to the base rate if work is performed inside the boundary of a Federally Designated Hazardous Waste Site. A Group 1 base rate is used for General Laborer on such a site. For further information on this, call the Prevailing Wage Rate Coordinator at (971) 673-0839.

See Zone Differential on page 44

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE	TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE

LABORER (continued)

Zone Differential for Laborers
(Add to Zone A Base Rate)

Zone B	**.85** per hour
Zone C	**1.25** per hour
Zone D	**2.00** per hour
Zone E	**3.00** per hour
Zone F	**5.00** per hour

Zone A: Projects located within 30 miles of city hall in the reference cities listed.
Zone B: More than 30 miles but less than 40 miles.
Zone C: More than 40 miles but less than 50 miles.
Zone D: More than 50 miles but less than 80 miles.
Zone E: More than 80 miles but less than 100 miles.
Zone F: More than 100 miles.

Reference Cities for Laborer

Albany	Burns	Hermiston	Roseburg
Astoria	Coos Bay	Klamath Falls	Salem
Baker City	Eugene	Medford	The Dalles
Bend	Grants Pass	Portland	

Note: All job or project locations shall be computed (determined) on the basis of road miles and in the following manner. A mileage measurement will start at the entrance to the respective city hall, facing the project (if possible), and shall proceed by the normal route (shortest time, best road) to the geographical center on the highway, railroad, and street construction projects (end of measurement). On all other project contracts, the geographical center where the major portion of the construction is located, shall be considered the center of the project (end measurement).

LIMITED ENERGY ELECTRICIAN

Area 1	**20.00**	**9.85**

Reference Counties Area 1

Malheur

Area 2	**29.42**	**13.29**

Reference Counties Area 2

Baker	Grant	Umatilla	Wallowa
Gilliam	Morrow	Union	Wheeler

LIMITED ENERGY ELECTRICIAN (continued)

Area 3	**30.95**	**16.73**

Reference Counties Area 3

Coos	Douglas (a)	Lincoln
Curry	Lane (a)	

(a) Those portions of Lane and Douglas lying **west** of a line running North and South from the NE corner of Coos County to the SE corner of Lincoln County.

Area 4	**32.63**	**14.48**

Reference Counties Area 4

Benton	Jefferson	Marion
Crook	Lane (b)	Polk
Deschutes	Linn	Yamhill (c)

(b) That portion of Lane County lying **east** of a line running North and South from the NE corner of Coos County to the SE corner of Lincoln County.

(c) South half

Area 5	**36.00**	**21.21**

Reference Counties Area 5

Clackamas	Hood River	Tillamook	Yamhill (d)
Clatsop	Multnomah	Wasco	
Columbia	Sherman	Washington	

(d) North Half

Area 6	**28.40**	**13.35**

Reference Counties Area 6

Douglas (e)	Jackson	Klamath
Harney	Josephine	Lake

(e) That portion of Douglas County lying **east** of a line running North and South from the NE corner of Coos County to the SE corner of Lincoln County.

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE

LINE CONSTRUCTOR

Area 1

Group 1	**59.09**	**20.50**
Group 2	**52.76**	**20.22**
Group 3	**30.05**	**12.94**
Group 4	**45.37**	**16.69**
Group 5	**39.57**	**14.98**
Group 6	**33.24**	**14.70**
Group 7	**18.14**	**10.44**

Reference Counties Area 1

All counties except Malheur County

Area 2

Cable Splicer	**53.11**	**16.83**
Journeyman Lineman	**48.09**	**16.33**
Line Equip. Operator	**39.99**	**15.45**
Groundman	**28.39**	**13.07**

Reference County Area 2

Malheur County

MARBLE SETTER **41.00** **20.32**

(This trade is tended by "Tile, Terrazzo, & Marble Finishers")

PAINTER & DRYWALL TAPER

COMMERCIAL PAINTING	**23.94**	**13.04**
INDUSTRIAL PAINTING	**25.14**	**13.04**
BRIDGE PAINTING	**29.96**	**13.04**

(Add $0.75 to base rate for work over 60 ft. high on swing stage, mechanical climber, spider or bucket truck for all wage classifications)

(Add $0.60 to base rate for sandblasting, spray painting and working in confined spaces)

DRYWALL TAPER

Zone A (Base Rate)

36.98 **15.44**

PAINTER & DRYWALL TAPER (continued)

Zone Differential for Drywall Taper
(Add to Zone A Base Rate)

Zone B	**1.25** per hour
Zone C	**1.70** per hour
Zone D	**2.00** per hour
Zone E	**3.00** per hour
Zone F	**5.00** per hour
Zone G	**10.00** per hour

Reference Cities and Dispatch Points for Drywall Taper

Albany	Coquille	Medford	Roseburg
Astoria	Eugene	Newport	Salem
Baker	Grants Pass	North Bend	Seaside
Bandon	Hermiston	Pendleton	The Dalles
Bend	Klamath Falls	Portland	Tillamook
Burns	Kelso-Longview	Reedsport	Vancouver

Local #10
11105 NE Sandy Blvd.
Portland, OR 97220

Zone A: Projects located within 30 miles of the respective city hall of the reference cities and dispatch points listed.
Zone B: More than 30 miles, but less than 40 miles.
Zone C: More than 40 miles, but less than 50 miles.
Zone D: More than 50 miles, but less than 60 miles.
Zone E: More than 60 miles, but less than 70 miles.
Zone F: More than 70 miles, but less than 100 miles.
Zone G: More than 100 miles.

PLASTERER AND STUCCO MASON

(This trade is tended by "Tenders to Plasterers")

Zone A (Base Rate)

Plasterer	**35.79**	**16.58**
Swinging Scaffold	**36.79**	**16.58**
Nozzleman	**37.79**	**16.58**

Zone Differential for Plasterer and Stucco Mason
(Add to Zone A Base Rate)

Zone B	**.85** per hour
Zone C	**1.25** per hour
Zone D	**1.70** per hour
Zone E	**2.00** per hour
Zone F	**3.00** per hour
Zone G	**5.00** per hour
Zone H	**10.50** per hour for 8 hours

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE

PLASTERER AND STUCCO MASON (continued)

Zone A: Projects located within 30 miles of the respective city hall of the reference cities listed below.
Zone B: More than 30 miles, but less than 40 miles.
Zone C: More than 40 miles, but less than 50 miles.
Zone D: More than 50 miles, but less than 60 miles.
Zone E: More than 60 miles, but less than 70 miles.
Zone F: More than 70 miles, but less than 100 miles.
Zone G: More than 100 miles, but less than 300 miles.
Zone H: More than 300 miles.

Reference Cities for Plasterer & Stucco Mason

Bend	Medford	Salem
Eugene	Portland	

PLUMBER/PIPEFITTER/STEAMFITTER

Area 1	**31.00**	**15.57**

Reference Counties Area 1

Baker	Harney (a)	Malheur

(a) Except that portion which lies North and West of a North-South line drawn from the town of John Day to a point five miles east of the town of Burns and three miles South of Burns thence on an airline through the town of Wagontire West to the county line.

(Add $2.21 to base rate if it is possible for worker to fall 30 ft. or more, or if required to wear a fresh-air mask or similar equipment for 2 hours or more)

Zone Differential for Area 1
Plumbers/Pipefitters/Steamfitters
(Add to Base Rate)

Zone 1	**2.50** per hour
Zone 2	**3.50** per hour
Zone 3	**5.00** per hour

Zone mileage based on road miles:
Zone 1: Forty (40) to fifty five (55) miles from City Hall in Boise, Idaho.
Zone 2: Fifty five (55) to one hundred (100) miles from City Hall in Boise, Idaho.
Zone 3: Over one hundred (100) miles from City Hall in Boise, Idaho.

There shall be a maximum of ten (10) hours of zone pay per workday.

PLUMBER/PIPEFITTER/STEAMFITTER (continued)

Area 2	**50.47**	**32.17**

Reference Counties Area 2

Grant	Umatilla	Wallowa
Morrow	Union	

Zone Differential for Area 2
(Add to Base Rate)

Zone 2 **10.62/**hr. not to exceed $80.00 day.

Zone mileage based on road miles:

Zone 2: Eighty (80) miles or more from City Hall in Pasco, Washington.

(Add $1.00 to base rate if it is possible for worker to fall 35 ft. or more, or if required to wear a fresh-air mask or similar equipment for 1 hour minimum increments)

Area 3	**45.95**	**31.50**

Reference Counties Area 3

Benton	Deschutes	Klamath	Polk
Clackamas	Douglas	Lake	Sherman
Clatsop	Gilliam	Lane	Tillamook
Columbia	Hood River	Lincoln	Wasco
Coos	Jackson	Linn	Washington
Crook	Jefferson	Marion	Wheeler
Curry	Josephine	Multnomah	Yamhill

POWER EQUIPMENT OPERATOR

Zone 1 (Base Rate)

Group 1	**43.15**	**14.60**
Group 1A	**45.31**	**14.60**
Group 1B	**47.47**	**14.60**
Group 2	**41.24**	**14.60**
Group 3	**40.09**	**14.60**
Group 4	**39.01**	**14.60**
Group 5	**37.77**	**14.60**
Group 6	**34.55**	**14.60**

(Group 4 Tunnel Boring Machine Mechanic add $10.00/hour hyperbaric pay)

See Zone Differential on page 47

POWER EQUIPMENT OPERATOR (continued)

Note: A Hazardous Waste Removal Differential must be added to the base rate if work is performed inside the boundary of a Federally Designated Waste Site. For information on this differential, call the Prevailing Wage Rate Coordinator at (971) 673-0839.

(Add $0.40 to the base rate for any and all work performed underground, including operating, servicing and repairing of equipment)

(Add $0.50 to the base rate per hour for any employee who works suspended by a rope or cable)

(Add $0.50 to the base rate for employees who do "pioneer" work (break open a cut, build road, etc.) more than one hundred fifty (150) feet above grade elevation)

Shift Differential

Two-Shift Operations:

On a two shift operation, when the second shift starts after 4:30 p.m., second-shift workers shall be paid the base hourly wage rate plus 5% for all hours worked.

When the second shift starts at 8:00 p.m. or later, the second-shift workers shall be paid at the base hourly wage rate plus 10% for all hours worked.

Three-Shift Operations:

On a three-shift operation, the base hourly wage rate plus five percent (5%) shall be paid to all second-shift workers for all hours worked, and the base hourly wage rate plus ten percent (10%) shall be paid to all third shift workers for all hours worked.

Zone Pay Differential for Power Equipment Operator
(Add to Zone 1 Base Rate)

Zone 2	**3.00** per hour
Zone 3	**6.00** per hour

For projects in the following metropolitan counties:

Clackamas	Marion	Washington
Columbia	Multnomah	Yamhill

POWER EQUIPMENT OPERATOR (continued)

See map on page 51 for Zone 1 of this classification

(A) All jobs or projects located in Multnomah, Clackamas and Marion counties, West of the western boundary of Mt. Hood National Forest and West of Mile Post 30 on Interstate 84 and West of Mile Post 30 on State Hwy 26 and West of Mile Post 30 on Hwy 22 and all jobs located in Yamhill County, Washington County and Columbia County shall receive Zone 1 pay for all classifications.

(B) All jobs or projects located in the area outside the *identified boundary* above, but less than 50 miles from the Portland City Hall shall receive Zone 2 pay for all classifications.

(C) All jobs or projects located more than 50 miles from the Portland City Hall, but outside the identified border above, shall receive Zone 3 pay for all classifications.

Reference cities for projects in all remaining counties:

Albany	Coos Bay	Grants Pass	Medford
Bend	Eugene	Klamath Falls	Roseburg

(A) All jobs or projects located within 30 miles of the respective city hall of the above mentioned cities shall receive Zone 1 pay for all classifications.

(B) All jobs or projects located more than 30 miles and less than 50 miles from the respective city hall of the above mentioned cities shall receive Zone 2 for all classifications.

(C) All jobs or projects located more than 50 miles from the respective city hall of the above mentioned cities shall receive Zone 3 pay for all classifications.

Note: All job or project locations shall be computed (determined) on the basis of road miles and in the following manner. A mileage measurement will start at the entrance to the respective city hall, facing the project (if possible), and shall proceed by the normal route (shortest time-best road) to the geographical center on the highway, railroad, and street construction projects (end of measurement). On all other project contracts, the geographical center where the major portion of the construction is located, shall be considered the center of the project (end measurement).

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE

ROOFER

Area 1

Roofer	**34.63**	**19.37**
Handling coal tar pitch	**38.09**	**19.37**
Remove fiberglass insulation	**38.09**	**19.37**

Reference Counties Area 1

Baker	Gilliam	Multnomah	Washington
Clackamas	Grant	Sherman	Wheeler
Clatsop	Hood River	Tillamook	
Columbia	Jefferson	Wasco	

Area 2

Roofer	**28.05**	**18.54**
Handling coal tar pitch	**30.05**	**18.54**
Remove fiberglass insulation	**29.55**	**18.54**

Reference Counties Area 2

Benton	Douglas	Lake	Marion
Coos	Harney	Lane	Polk
Crook	Jackson	Lincoln	Yamhill
Curry	Josephine	Linn	
Deschutes	Klamath	Malheur	

Area 4

Roofers	**27.48**	**12.73**

Reference Counties Area 4

Umatilla Union Wallowa

(Add $2.00 to basic hourly rate for employees working with irritable bituminous materials)

(Add $2.00 to basic hourly rate for employees removing fiberglass insulation)

Area 5

Roofers	**27.43**	**12.78**

Reference County for Area 5

Morrow

(Add $3.00 to base rate for employees working with irritable and pitch bituminous materials)

SHEET METAL WORKER

Area 1 — **40.29** **21.61**

Reference Counties Area 1

Benton	Grant	Multnomah	Washington
Clackamas	Hood River	Polk	Wheeler
Clatsop	Lincoln	Sherman	Yamhill
Columbia	Linn	Tillamook	
Gilliam	Marion	Wasco	

(Add $1.00 to base rate for work performed on any swinging platform, swinging chair or swinging ladder)

(Add $1.00 to base rate for work where a worker is exposed to resins, chemicals or acid)

Area 2 — **26.66** **18.26**

Reference Counties Area 2

Baker Malheur

(Add $1.75 to base rate for work performed in an area where epoxy resins or other injurious chemicals are being applied)

Area 3 — **36.90** **21.17**

Reference Counties Area 3

Morrow Umatilla Union Wallowa

(Add $1.00 to base rate for work where it is necessary to wear a chemically activated type face mask)

Area 4 — **33.39** **19.47**

Reference Counties Area 4

Douglas Lane

(Add $1.00 to base rate for work performed on any swinging platform, swinging chair or swinging ladder)

(Add $1.00 to base rate for work where a worker is exposed to resins, chemicals or acid)

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE

SHEETMETAL WORKER (continued)

Area 5 **33.67** **20.48**

Reference Counties Area 5

Coos

(Add $1.00 to base rate for work performed on any swinging platform, swinging chair or swinging ladder)

(Add $1.00 to base rate for work where a worker is exposed to resins, chemicals or acid)

Area 6 **28.37** **18.50**

Reference Counties Area 6

Curry	Jackson	Klamath
Harney	Josephine	Lake

(Add $1.00 to base rate for work performed on any swinging platform, swinging chair or swinging ladder)

(Add $1.00 to base rate for work where a worker is exposed to resins, chemicals or acid)

Area 7 **31.12** **18.15**

Reference Counties Area 7

Crook	Deschutes	Jefferson

(Add $1.00 to base rate for work performed on any swinging platform, swinging chair or swinging ladder)

(Add $1.00 to base rate for work where a worker is exposed to resins, chemicals or acid)

SOFT FLOOR LAYER **29.50** **18.24**

SPRINKLER FITTER

Area 1 **39.21** **23.02**

Reference Counties Area 1

Benton	Deschutes	Klamath	Polk
Clackamas	Douglas	Lake	Sherman
Clatsop	Harney	Lane	Tillamook
Columbia	Hood River	Lincoln	Wasco
Coos	Jackson	Linn	Washington
Crook	Jefferson	Marion	Wheeler
Curry	Josephine	Multnomah	Yamhill

SPRINKLER FITTER (continued)

Area 2 **33.75** **22.92**

Reference Counties Area 2

Baker	Grant	Morrow	Union
Gilliam	Malheur	Umatilla	Wallowa

TENDERS TO MASON TRADES (Brick and Stonemason, Mortar Mixer, Hod Carrier)

33.74 **14.60**

(Add $0.50 to base rate for Refractory work)

TENDER TO PLASTERER AND STUCCO MASON

Zone A (Base Rate)
33.30 **14.79**

Zone Differential for Tender to Plasterer and Stucco Mason
(Add to Zone A Base Rate)

Zone B	**.85** per hour
Zone C	**1.25** per hour
Zone D	**1.70** per hour
Zone E	**2.00** per hour
Zone F	**3.00** per hour
Zone G	**5.00** per hour

Zone A: Projects located within 30 miles of city hall in the reference cities listed.
Zone B: More than 30 miles but less than 40 miles.
Zone C: More than 40 miles but less than 50 miles.
Zone D: More than 50 miles but less than 60 miles.
Zone E: More than 60 miles but less than 70 miles.
Zone F: More than 70 miles but less than 100 miles.
Zone G: More than 100 miles.

Reference Cities

Astoria	Coos Bay	Medford	Roseburg
Bend	Eugene	Pendleton	Salem
Corvallis	Klamath Falls	Portland	The Dalles

(Add $0.50 to base rate for Refractory work)

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE

TESTING AND BALANCING (TAB) TECHNICIAN

Air-Handling Equipment, Ductwork

See SHEET METAL WORKER

Water Distribution Systems

See PLUMBER/PIPEFITTER/STEAMFITTER

TILESETTER/TERRAZZO WORKER: Hard Tilesetter

34.25 18.87

(This trade is tended by "Tile, Terrazzo, & Marble Finisher")

(Add $1.00 to base rate when working with a safety belt)

(Add $1.00 to base rate if work involves epoxy, furnane, alkor or acetylene black grouting)

TILE, TERRAZZO, AND MARBLE FINISHER

1. TILE, TERRAZZO FINISHER
26.10 13.76

(Add $1.00 to base rate when working with a safety belt)

(Add $1.00 to base rate if work involves epoxy, furnane, alkor or acetylene black grouting)

2. BRICK AND MARBLE FINISHER
26.10 13.89

(Add $1.00 to base rate for Refractory work)

TRUCK DRIVER

Zone A (Base Rate)

Group 1	**29.08**	**15.27**
Group 2	**29.20**	**15.27**
Group 3	**29.34**	**15.27**
Group 4	**29.62**	**15.27**
Group 5	**29.85**	**15.27**
Group 6	**30.03**	**15.27**
Group 7	**30.24**	**15.27**

TRUCK DRIVER (continued)

Zone differential for Truck Drivers
(Add to Zone A Base Rate)

Zone B	**.65** per hour
Zone C	**1.15** per hour
Zone D	**1.70** per hour
Zone E	**2.75** per hour

Zone A: Projects within 30 miles of the cities listed.
Zone B: More than 30 miles but less than 40 miles.
Zone C: More than 40 miles but less than 50 miles.
Zone D: More than 50 miles but less than 80 miles.
Zone E: More than 80 miles.

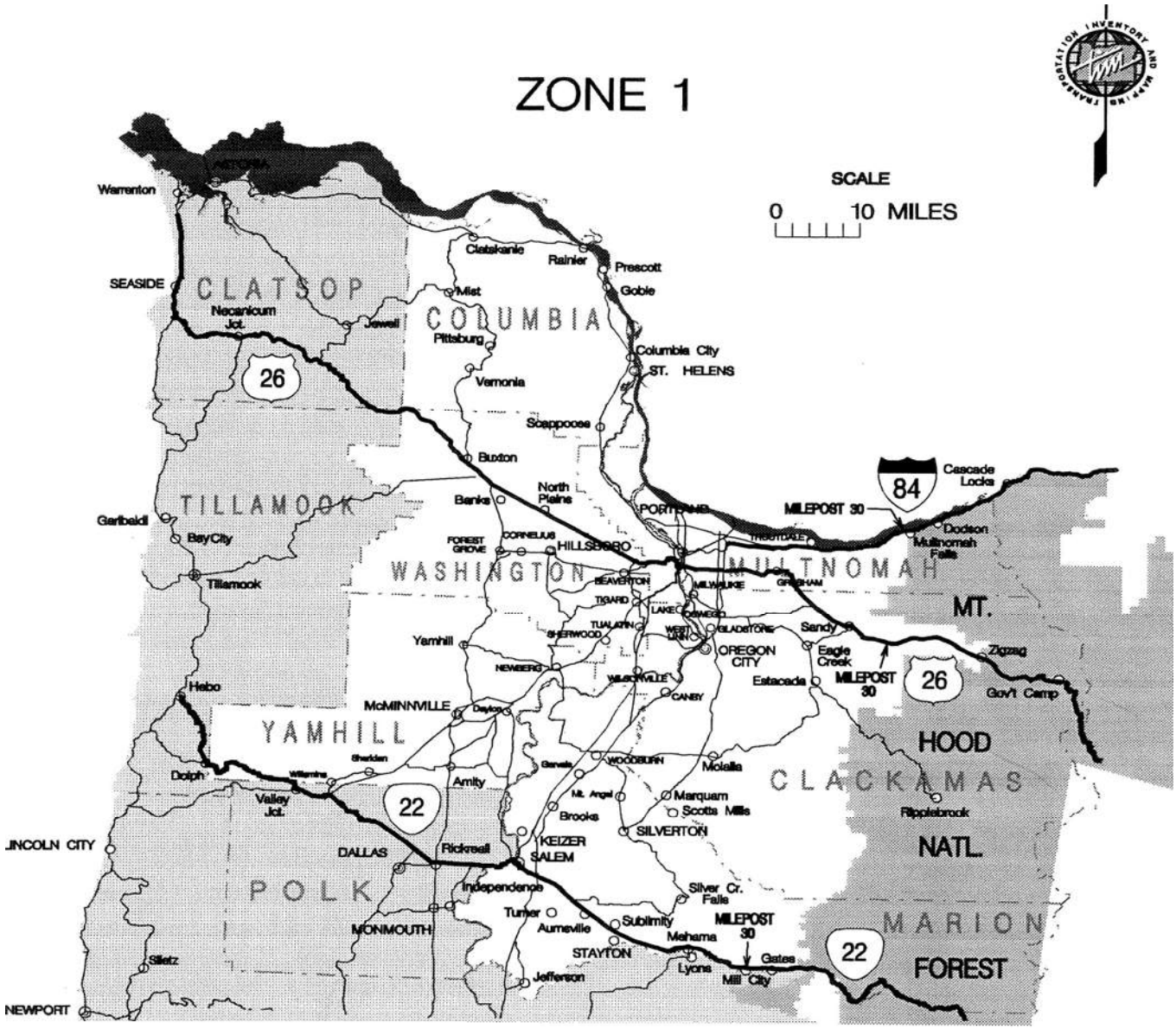
Reference Cities

Albany	Eugene	Madras	Reedsport
Astoria	Goldendale	Medford	Roseburg
Baker	Grants Pass	McMinnville	Salem
Bend	Hermiston	Newport	The Dalles
Bingen	Hood River	Ontario	Tillamook
Brookings	Klamath Falls	Oregon City	Vancouver
Burns	LaGrande	Pendleton	
Coos Bay	Lakeview	Portland	
Corvallis	Longview	Port Orford	

Note: All job or project locations shall be computed (determined) on the basis of road miles and in the following manner. A mileage measurement will start at the entrance to the respective city hall, facing the project (if possible), and shall proceed by the normal route (shortest time-best road) to the geographical center on the highway, railroad, and street construction projects (end of measurement). On all other project contracts, the geographical center where the major portion of the construction is located, shall be considered the center of the project (end measurement).

TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE	TRADE	HOURLY BASE RATE	HOURLY FRINGE RATE

POWER EQUIPMENT OPERATOR



LIST OF CONTRACTORS INELIGIBLE
TO RECEIVE PUBLIC WORKS CONTRACTS
PUBLICATION DATE: JULY 1, 2019

To: All Oregon Contracting Agencies

Pursuant to ORS 279C.860, contractors on this list are ineligible to receive public works contracts subject to the Prevailing Wage Rate Law. These contractors and subcontractors, as well as any firm, corporation, partnership or association in which the contractor or subcontractor has a financial interest are ineligible to receive public works contracts until removed from this list.

If you have questions regarding the list or for the most current information regarding persons ineligible to receive prevailing wage contracts, please contact the Prevailing Wage Rate Coordinator in Portland at (971) 673-0839.

	CONTRACTOR NAME	DATE PLACED	REMOVAL DATE
1.	**A2Z Flagging LLC** 731 N Hayden Meadows Dr, #107 Portland, OR 97217	May 2, 2017	May 1, 2020
2.	**Atilla, Inc.** 5305 River Road N., Ste. B Keizer, OR 97303	August 3, 2018	August 2, 2021
3.	**Christy C. Beaver** 2570 River Road Eugene, OR 97404	November 25, 2009	November 24, 2019
4.	**Beaver Flagging** 2239 Dakota Street Eugene, OR 97404	November 25, 2009	November 24, 2019
5.	**Kimberly Bell-Eddy** 8535 Woodard Ave SE Salem, OR 97317	January 12, 2016	January 11, 2023
6.	**Russ Brotnov** 22905 S Stormer Rd Estacada, OR 97023	January 5, 2017	January 4, 2020
7.	**Cameron Creations** **Steven Cameron** **Nancy Cameron** PO Box 2 Lowell, OR 97452	May 25, 2000	Not to be Removed
8.	**Angela Canell** 6020 NE 33rd Circle Vancouver, WA 98661	May 2, 2017	May 1, 2020
9.	**Carpentry Plus, Inc.** P O Box 998 Boring, OR 97009-0998	January 5, 2017	January 4, 2020
10.	**Gentry Ceniga** 20949 Knott Road Bend, OR 97702	August 14, 2018	August 13, 2021
11.	**Concrete Works, Inc.** 2425 Fischer Rd NE Salem, OR 97305	June 15, 2017	June 14, 2020

LIST OF CONTRACTORS INELIGIBLE
TO RECEIVE PUBLIC WORKS CONTRACTS
PUBLICATION DATE: JULY 1, 2019

	CONTRACTOR NAME	DATE PLACED	REMOVAL DATE
12.	**G & K Masonry Inc.** 20949 Knott Road Bend, OR 97702	August 14, 2018	August 13, 2021
13.	**GNC Construction Services, LLC** 309 S. McLoughlin Blvd. Oregon City, OR 97045	July 21, 2015 July 21, 2018	July 20, 2018 July 20, 2021
14.	**Eugene Graeme** 169 SE Cody Lane Madras, OR 97741	July 3, 2017	July 2, 2027
15.	**Armond Harper** 4071 N Mississippi Ave., Apt. A Portland, OR 97227	May 30, 2017	May 29, 2020
16.	**Kim Bell Flagging, Inc.** 8535 Woodard Ave SE Salem, OR 97317	January 12, 2016	January 11, 2023
17.	**Mountain View Flagging, Inc.** 1122 NE 122nd Ave Portland, OR 97230	September 26, 2016	September 25, 2019
18.	**Sang In Nam dba** **Cornerstone Janitorial Services** 130 NE Danbury Ave Hillsboro, OR 97124	September 20, 2016	Not to be Removed
19.	**Phoenix Construction Group, Inc.** 309 S. McLoughlin Blvd. Oregon City, OR 97045	August 24, 2015 August 24, 2018	August 23, 2018 August 23, 2021
20.	**Portland Safety Equipment, LLC** 309 S. McLoughlin Blvd. Oregon City, OR 97045	August 24, 2015 August 24, 2018	August 23, 2018 August 23, 2021
21.	**Bernadine Raiford** 424 NE Shaver Street Portland, OR 97212	September 26, 2016	September 25, 2019
22.	**R.B. Development Corporation Inc.** 14634 Kasel Court NE Aurora, OR 97002	August 3, 2018	August 2, 2021
23.	**SBG Construction Services LLC** 309 S. McLoughlin Blvd. Oregon City, OR 97045	August 24, 2015 August 24, 2018	August 23, 2018 August 23, 2021
24.	**Cassie Seeley** 7991 Little Rd. SE Aumsville, OR 97325-9497	July 13, 2017	July 12, 2020

LIST OF CONTRACTORS INELIGIBLE
TO RECEIVE PUBLIC WORKS CONTRACTS
PUBLICATION DATE: JULY 1, 2019

	CONTRACTOR NAME	DATE PLACED	REMOVAL DATE
25.	**Irma Anita Starr** 14634 Kasel Court NE Aurora, OR 97002	August 3, 2018	August 2, 2021
26.	**Norman James Starr** 14634 Kasel Court NE Aurora, OR 97002	August 3, 2018	August 2, 2021
27.	**Alan Tatom** 168 Clearwater Avenue NE Salem, OR 97301	July 10, 2015	July 9, 2025
28.	**Phillip Walker** 580 Market Street NE Salem, OR 97301	July 10, 2015	July 9, 2025
29.	**WCI Construction LLC** 169 SE Cody Lane Madras, OR 97741	July 3, 2017	July 2, 2027
30.	**WWJD Traffic Control, Inc.** 168 Clearwater Avenue NE Salem, OR 97301	July 10, 2015	July 9, 2025

VAL HOYLE, COMMISSIONER
OREGON BUREAU OF LABOR AND INDUSTRIES

PREVAILING WAGE RATE FORMS

WH-38	**Certified Payroll Form**
WH-39	**Public Works Fee Information Form**
WH-40	**Public Works Fee Adjustment Form**
WH-81	**Notice of Public Works**
WH-118	**Planned Public Improvement Summary**
WH-119	**Capital Improvement Cost Comparison Estimate**

BUREAU OF LABOR AND INDUSTRIES, PREVAILING WAGE RATE UNIT

INSTRUCTIONS FOR COMPLETING THE PREVAILING WAGE RATE PAYROLL/CERTIFIED STATEMENT FORM (WH-38)

The Payroll/Certified Statement form (WH-38) may be used by contractors for reporting their payroll as required by ORS 279C.845 on public works projects subject to the Prevailing Wage Rate (PWR) Law. Although this form has not been officially approved by the U.S. Department of Labor (US DOL), it is designed to meet the requirements of the federal Davis-Bacon Act. For projects associated with the U.S. Department of Housing and Urban Development (HUD), contact the public agency (owner) associated with the project for assistance with payroll reporting.

Contractors are not required to use the WH-38 form in reporting their payroll; however, the contractor must provide all of the information contained in the form, including the certified statement on page two. The certified statement must be signed by the contractor, certifying the accuracy of the information reported on the payroll, including representations pertaining to the provision of fringe benefits to employees by third parties, and must be submitted with each weekly payroll report. Detailed instructions concerning the preparation of the form follow:

Complete the top third of the form. Be sure to enter the date the contract was first advertised for bid. If you are not sure of this date, contact the public agency (owner) associated with the project. The "Payroll No." is a US DOL requirement and represents the number of weeks the contractor performed work on the project.

Column 1 – NAME AND ADDRESS: The employee's full name must be shown on each payroll submitted. The employee's address must also be shown on the first payroll submitted. The address need not be shown on subsequent payrolls submitted unless the address changes. The US DOL requires an employee identification number for each individual employee, on each payroll submitted. This number may be, but does not have to be, the last four digits of the employee's social security number.

Column 2 – CLASSIFICATION: For assistance in determining the correct classification, use the Bureau of Labor and Industries' (BOLI's) publication "Definitions of Covered Occupations for Public Works Contracts in Oregon." On the WH-38, list the classification that is most descriptive of the work actually performed by the employee. Give the group number for those classifications that include such information. Indicate which workers are apprentices, if any, and give their current percentage, classification, and group number when applicable. If an employee works in more than one classification, use the highest rate for all hours worked, or use separate line entries to show hours worked and hourly rates for each classification.

Column 3 – DAY AND DATE: Enter the day of the week (M, T, W, Th, F, S, and Sn) in the top row of boxes, and the corresponding date below.

HOURS WORKED EACH DAY: Enter the total number of straight time hours worked in the row marked "ST." Generally, hours worked over 8 in a day or work performed on Saturdays, Sundays, and legal holidays should be entered as overtime ("OT") hours worked. Contractors who have adopted and followed a written work schedule of four consecutive ten-hour days (Monday through Thursday or Tuesday through Friday) may enter hours worked over 10 in a day as overtime hours. For more information on overtime requirements, see the Contractor Responsibilities section of BOLI's publication, "*Prevailing Wage Rate Laws*."

Check the correct work schedule box to indicate the employee's weekly work schedule: 5/8 or 4/10. Enter the employee's regular hourly schedule for the week being reported next to the "Reg. Hrly. Schd:_____to_____." For example: 7:00 a.m. to 4:30 p.m.

Column 4 – TOTAL HOURS: Enter separately the total number of straight time and overtime hours worked by the employee (in each classification, if applicable) on the PWR project during the week. The total number of straight time hours worked should be entered in the lower box ("ST"); the total number of overtime hours worked should be entered in the top box ("OT").

Column 5 – HOURLY BASE RATE: Enter the hourly base rate (plus zone pay, if any) and the hourly overtime rate (plus zone pay, if any) paid to the employee in the appropriate straight time and overtime boxes. (Payment of not less than one and one half times the base rate of pay, including zone pay but not including fringe benefits, is required to be paid for overtime hours pursuant to ORS 279C.540). Generally, use the appropriate prevailing wage rates in effect at the time the contract was first advertised for bid by the public agency. If this date is not known, or if the project was not advertised for bid, contact the public agency (owner) associated with the project for assistance with applicable rates.

Column 6 – HOURLY FRINGE BENEFIT AMOUNT PAID AS WAGES TO THE EMPLOYEE: Enter hourly fringe benefit amounts paid directly to the employee as wages. (For overtime hours worked, it is not necessary to pay time and one half for the fringe benefit portion of the prevailing wage rate.)

Column 7 – GROSS AMOUNT EARNED: Enter the gross amount earned for work on the PWR project during the week. If part of the employee's wages for the pay period were earned on projects other than the project described on the WH-38, or if the employee is paid less often than on a weekly basis, enter in column 7 first the gross amount earned on the PWR project for the week, then the total gross amount earned for the pay period. For example: $567.84 / $1,267.27.

Column 8 – ITEMIZED DEDUCTIONS, FICA, FED, STATE, ETC.: Enter deductions withheld from wages for the pay period. All deductions must be in accordance with the provisions of ORS 652.610 (and as defined in Regulations, Part 3 (29 CFR Subtitle A), issued by the Secretary of Labor under the Copeland Act, as amended (48 Stat. 948, 63 Stat. 108, 72 Stat. Stat. 967, 76 Stat. 357; 40 U.S.C 276c) on projects subject to Davis-Bacon Act). For projects subject to the Davis-Bacon Act, itemize the deductions.

Column 9 – NET WAGES PAID: Enter the total amount of net wages actually paid to the employee for the pay period. This figure can be calculated by subtracting the total deductions reported in Column 8 from the gross amount of wages for the pay period reported in the bottom portion of Column 7.

Column 10 – HOURLY FRINGE BENEFITS PAID TO BENEFITS PARTY, PLAN, FUND OR PROGRAM: Enter the hourly amount of fringe benefits paid to each individually approved party, plan, fund, or program, for each employee. List these amounts separately on the lines provided. Any contractor who is making payments to approved parties, plans, funds or programs in amounts less than the required hourly fringe benefit is obligated to pay the difference directly to the employee as wages in lieu of fringe benefits, and to show that amount in Column 6 of this form. For information on how to calculate hourly fringe benefit credits, see Appendix A in the BOLI's publication, "*Prevailing Wage Rate Laws*."

Column 11 – NAME OF BENEFIT PARTY, PLAN, FUND OR PROGRAM: Enter the name of the party, plan, fund, or program that corresponds to the amount paid as an hourly fringe benefit in Column 10.

CALCULATION CHECK

In order to determine whether the wages and fringe benefits paid are sufficient to meet prevailing wage rate requirements, the following check may be performed:

1. For each classification listed in column 2, compute the sum of:
   a) the hourly base rate of pay shown in Column 5,
   b) the hourly fringe benefit amount paid as wages to employee shown in Column 6, and
   c) the hourly fringe benefits paid to benefit party, plan, fund or program shown in Column 10.

2. This sum must equal or exceed the total of the hourly base rate (including zone pay) and the hourly fringe benefit rate for that classification as listed in the appropriate issue of BOLI's publication, *Prevailing Wage Rates for Public Works Contracts in Oregon*.

IF YOU HAVE QUESTIONS REGARDING COMPLETION OF THIS FORM, CONTACT THE PREVAILING WAGE RATE UNIT OF THE BUREAU OF LABOR AND INDUSTRIES AT (971) 673-0838.

NOTE: PAYROLL/CERTIFIED STATEMENTS ARE ONLY REQUIRED TO BE SUBMITTED TO THE PUBLIC AGENCY ASSOCIATED WITH THE PROJECT.

CERTIFIED PAYROLL AND OTHER FORMS ARE AVAILABLE ON OUR WEBSITE: WWW.OREGON.GOV/BOLI

BUREAU OF LABOR AND INDUSTRIES
WAGE AND HOUR DIVISION

PAYROLL/CERTIFIED STATEMENT FORM WH-38
FOR USE IN COMPLYING WITH ORS 279C.845*

PRIME CONTRACTOR ☐ SUBCONTRACTOR ☐ PAYROLL NO._____ FINAL PAYROLL ☐

Business Name (DBA): Phone: ( ) CCB Registration Number:

Project Name: Project Number: Type of Work:

Street Address: Project Location:

Mailing Address: Project County:

Date Pay Period Began: Date Pay Period Ended:

THIS SECTION FOR PRIME CONTRACTORS ONLY

Public Contracting Agency Name:
Phone: ( )
Date Contract Specifications First Advertised for Bid:
Contract Amount:

THIS SECTION FOR SUBCONTRACTORS ONLY

Subcontract Amount:
Prime Contractor Business Name (DBA):
Prime Contractor Phone: ( )
Prime Contractor's CCB Registration Number:
Date You Began Work on the Project:

(1)	(2)		(3) DAY AND DATE	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)
NAME , ADDRESS AND EMPLOYEE'S IDENTIFICATION NUMBER	CLASSIFICATION (INCLUDE GROUP # AND APPRENTICESHIP STEP IF APPLICABLE)		HOURS WORKED EACH DAY	TOTAL HOURS	HOURLY BASE RATE	HOURLY FRINGE BENEFIT AMOUNTS PAID AS WAGES TO EMPLOYEE	GROSS AMOUNT EARNED (see directions)	ITEMIZED DEDUCTIONS FICA, FED, STATE, ETC.	NET WAGES PAID	HOURLY FRINGE BENEFITS PAID TO BENEFIT PARTY, PLAN, FUND, OR PROGRAM	NAME OF BENEFIT PARTY, PLAN, FUND, OR PROGRAM
		OT									
		ST									
		Schedule: 5/8 ☐ 4/10 ☐; Reg. Hrly. Schd: _____to_____.									
		OT									
		ST									
		Schedule: 5/8 ☐ 4/10 ☐; Reg. Hrly. Schd: _____to_____.									
		OT									
		ST									
		Schedule: 5/8 ☐ 4/10 ☐; Reg. Hrly. Schd: _____to_____.									
		OT									
		ST									
		Schedule: 5/8 ☐ 4/10 ☐; Reg. Hrly. Schd: _____to_____.									
		OT									
		ST									
		Schedule: 5/8 ☐ 4/10 ☐; Reg. Hrly. Schd: _____to_____.									

*Although this form has not been officially approved by the U.S. Department of Labor, it is designed to meet the requirements of both the state PWR law and the federal Davis-Bacon Act.

THIS FORM CONTINUED ON REVERSE

CERTIFIED STATEMENT

Date: _____

I, _____, _____
(NAME OF SIGNATORY PARTY) (TITLE)
do hereby state:
(1) That I pay or supervise the payment of the persons employed by:

_____
(CONTRACTOR, SUBCONTRACTOR OR SURETY)
on the _____; that during the payroll period
(BUILDING OR WORK)
commencing on the _____ day of _____, _____, and ending the _____ day
(MONTH) (YEAR)
of _____, _____, all persons employed on said project have been paid the
(MONTH) (YEAR)
full weekly wages earned, that no rebates have been or will be made either directly or indirectly to or on behalf of said _____
(CONTRACTOR, SUBCONTRACTOR OR SURETY)
from the full weekly wages earned by any person, and that no deductions have been made either directly or indirectly from the full wages earned by any person, other than permissible deductions as specified in ORS 652.610, and as defined in Regulations, Part 3 (29 CFR Subtitle A), issued by the Secretary of Labor under the Copeland Act, as amended (48 Stat. 948, 63 Stat. 108, 72 Stat. 967; 76 Stat. 357; 40 U.S.C. 276c), and described below:

_____

(2) That any payrolls otherwise under this contract required to be submitted for the above period are correct and complete; that the wage rates for workers contained therein are not less than the applicable wage rates contained in any wage determination incorporated into the contract; that the classifications set forth therein for each worker conform with work performed.

(3) That any apprentices employed in the above period are duly registered in a bona fide apprenticeship program registered with a state apprenticeship agency recognized by the Bureau of Apprenticeship and Training, United States Department of Labor, or if no such recognized agency exists in a state, are registered with the Bureau of Apprenticeship and Training, United States Department of Labor.

I HAVE READ THIS CERTIFIED STATEMENT, KNOW THE CONTENTS THEREOF AND IT IS TRUE TO MY KNOWLEDGE:

_____
(NAME AND TITLE)

_____
(SIGNATURE AND DATE)

In addition to completing sections (1) - (3), if your project is subject to the federal Davis-Bacon Act requirements, complete the following section as well:

(4) That:
(a) WHERE FRINGE BENEFITS ARE PAID TO APPROVED PLANS, FUNDS OR PROGRAMS

☐ - In addition to the basic hourly wage rates paid to each laborer or mechanic listed in the above referenced payroll, payments of fringe benefits as listed in the contract have been or will be made to appropriate programs for the benefit of such employees, except as noted in Section 4(c) below.

(b) WHERE FRINGE BENEFITS ARE PAID IN CASH

☐ - Each laborer or mechanic listed in the above referenced payroll has been paid, as indicated on the payroll, an amount not less than the sum of the applicable basic hourly wage rate plus the amount of the required fringe benefits as listed in the contract, except as noted in Section 4(c) below.

(c) EXCEPTIONS:

EXCEPTION (CRAFT)	EXPLANATION

REMARKS:

NAME AND TITLE SIGNATURE

THE WILLFUL FALSIFICATION OF ANY OF THE ABOVE STATEMENTS MAY SUBJECT THE CONTRACTOR OR SUBCONTRACTOR TO CIVIL OR CRIMINAL PROSECUTION. SEE SECTION 1001 OF TITLE 18 AND SECTION 231 OF TITLE 31 OF THE UNITED STATES CODE.

FILE THIS FORM WITH THE PUBLIC AGENCY ASSOCIATED WITH THE PROJECT
NOTE TO CONTRACTORS: YOU MUST ATTACH COPIES OF THIS FORM TO EACH OF YOUR PAYROLL SUBMISSIONS ON THIS PROJECT.
INSTRUCTIONS AND ADDITIONAL FORMS ARE AVAILABLE ON OUR WEBSITE: WWW.OREGON.GOV/BOLI.

CONTRACT FEE SECTION
PREVAILING WAGE RATE UNIT
BUREAU OF LABOR AND INDUSTRIES
800 N.E. OREGON ST., #1045
PORTLAND, OR 97232-3601
PHONE: (971) 673-0852
FAX: (971) 673-0769

For Office Use Only:

Project DB #:_____

PUBLIC WORKS FEE INFORMATION FORM

For use by public agencies that have contracted with a contractor on a public works project regulated by ORS 279C.800 to 279C.870, in compliance with ORS 279C.825. Also for use by public agencies that are a party to a public works project pursuant to ORS 279C.800(6)(a)(B), (C) (D) or (E).

PUBLIC AGENCIES: Please complete and mail this form to BOLI at the above address, along with the public works fee of one-tenth of one percent of the contract price (contract amount x .001), payable to BOLI. **The minimum fee is $250.00; the maximum fee is $7,500.00.** Without the following completed information, the bureau may be unable to properly credit you for payment received.

PUBLIC AGENCY: _____ **AGENCY #:** _____

AGENCY MAILING ADDRESS: _____

CITY, STATE, ZIP _____

AGENCY CONTACT PERSON: _____ **PHONE: ( )** _____

PROJECT MANAGER NAME: _____ **PHONE: ( )** _____

PROJECT NAME: _____

CONTRACT NAME (if part of larger project): _____

PROJECT LOCATION: _____

PROJECT NO: _____ **DATE CONTRACT FIRST ADVERTISED:** _____

DATE CONTRACT AWARDED: _____ **CONTRACTOR CCB#:** _____

CONTRACTOR BUSINESS NAME (DBA): _____

CONTRACTOR ADDRESS: _____

CITY, STATE ZIP _____

CONTRACT AMOUNT: $ _____ **FEE AMOUNT DUE/PAID: $** _____

If less than $50K is it part of a larger project? ☐yes ☐no **Contract amount x .001 = fee due**

(Please duplicate this form for future use.)

CONTRACT FEE SECTION
PREVAILING WAGE RATE UNIT
BUREAU OF LABOR AND INDUSTRIES
800 N.E. OREGON ST., #1045
PORTLAND, OR 97232-3601
PHONE: (971) 673-0852
FAX: (971) 673-0769

For Office Use Only:

Project DB #:_____

PUBLIC WORKS FEE ADJUSTMENT FORM

THIS FORM TO BE USED FOR RECONCILIATION OF FEES UPON COMPLETION OF PUBLIC WORKS PROJECTS

(As required by ORS 279C.825 and OAR 839-025-0210)

PUBLIC AGENCIES: Complete and mail this form to BOLI at the above address after completion of the public work project and not less than 30 days after the final progress payment is made to the contractor. Public agencies are required to determine the final contract price, including all change orders or other adjustments to the original contract price, and to calculate the adjusted prevailing wage rate fee based on the revised contract price. Documentation must be included to support the final contract price. Documentation of the final contract price may consist of change orders or other contract documents substantiating the amount of the contract. The prevailing wage rate fee of one-tenth of one percent (.001) shall be applied to the final contract price, with credit taken for fees already submitted. The public agency must submit any additional fee payable to BOLI, or submit any request for refund, with this adjustment form. **THE MINIMUM FEE IS $250.00; THE MAXIMUM FEE IS $7,500.00. NO ADDITIONAL FEE IS REQUIRED TO BE PAID, AND REFUNDS WILL NOT BE MADE, IF THE BALANCE DUE OR THE REFUND DUE IS LESS THAN $100.00.**

PUBLIC AGENCY: _____ **AGENCY #:** _____

AGENCY CONTACT PERSON: _____ **PHONE :( )** _____

MAILING ADDRESS: _____

PROJECT NAME: _____

CONTRACT NAME (if part of larger project): _____

PROJECT NUMBER: _____ **PROJECT LOCATION:** _____

CONTRACTOR/BUSINESS NAME (DBA): _____

CONTRACTOR CCB#: _____ **DATE AWARDED:** _____

FINAL CONTRACT/PROJECT AMOUNT: _____ **FINAL FEE DUE:** _____
(Include all change orders and adjustments to the contract price) **(Final Contract amount X .001)**

ORIGINAL CONTRACT AMOUNT: _____ **INITIAL FEE PAID:** _____
(Original Contract amount X .001)

TOTAL ADJUSTMENT: _____ **BALANCE DUE*:** _____
or
REFUND DUE*: _____
***Final contract fee less initial fee paid**

Sample Calculation:			
Final Contract Amount:	**$ 400,000.00**	**Final Fee Due:**	**$ 400.00**
Original Contract Amount:	**- 300,000.00**	**Initial Fee Paid:**	**- 300.00**
Total Adjustment:	**$ 100,000.00**	**Additional Amount Due:**	**$ 100.00**

(Please duplicate this form for future use)

BUREAU OF LABOR AND INDUSTRIES
NOTICE OF PUBLIC WORKS
(For use by public agencies in complying with ORS 279C.835)

For Office Use Only:

Project DB #:_____

NOTE: ORS 279C.835 requires that public contracting agencies include with this form a copy of the disclosure of first-tier subcontractors submitted pursuant to ORS 279C.370.

PUBLIC AGENCY INFORMATION

Agency Name: _____

Agency Division:_____ Agency # (if known):_____

Address:_____

City, State, Zip:_____

Email Address: _____

Agency Representative: _____ Phone: _____

SECTION A: To be completed when a public agency awards a contract to a contractor for a public works project, including CM/GC projects. (See reverse for public works projects in which no public agency awards a contract to a contractor.)

CONTRACT INFORMATION:

Project Name: _____

Contract Name (if part of larger project): _____

Project #: _____ Contract #:_____

Project Manager Name:_____ Phone: _____ Fax:_____

Project Location (Street(s), City): _____ Project County: _____

Contract Amount: $_____ If under $50,000, is this contract part of a larger project? YES ☐ NO ☐

If yes, total project amount: $_____

Will project use federal funds that require compliance with the Davis-Bacon Act? YES ☐ NO ☐

Date Contract Specifications First Advertised for Bid (if not advertised, date of RFP or first contact with contractor): _____

OR If CM/GC Contract, Date Contract Became a Public Works Contract (see OAR 839-025-0020(8)): _____

Date Contract Awarded: _____ Date Work Expected to Begin: _____ Date Work Expected to be Complete: _____

PRIME CONTRACTOR INFORMATION:

Name: _____

Address: _____

City, State Zip:_____ Phone:_____

Construction Contractors Board Registration #: _____

Name of Bonding Company: _____

Address: _____

Agent Name: _____ Phone:_____

Payment Bond #: _____

☐ Copy of first-tier subcontractors attached (**see NOTE above**).

Signature of agency representative completing form: _____

Printed Name: _____ Phone: _____ Date:_____

Email Address:_____

THIS FORM WILL BE RETURNED TO THE PUBLIC AGENCY FOR CORRECTION AND RESUBMITTAL IF INCOMPLETE.

Complete this page for public works projects in which NO PUBLIC AGENCY AWARDS A CONTRACT TO A CONTRACTOR. Complete the CONTRACT INFORMATION *AND* SECTION B, C, D or E, whichever applies to the project.

CONTRACT INFORMATION:

Name of Project Owner:_____ Phone: _____

Project Name: _____ Project #: _____

Project Location (Street(s), City): _____ Project County: _____

Total Project Cost: $_____ Amount of Public Funds Provided for the project: $_____

Name(s) of Public Agency(ies) Providing Public Funds: _____

Will project use federal funds that require compliance with the Davis-Bacon Act? YES ☐ NO ☐

Date Work Expected to Begin: _____ Date Work Expected to be Complete: _____

SECTION B: **To be completed when a project is a public works pursuant to ORS 279C.800(6)(a)(B)** (a project for the construction, reconstruction, major renovation or painting of a road, highway, building, structure or improvement of any type **that uses $750,000 or more of funds of a public agency**).

Date the public agency or agencies committed to the provision of funds for the project: _____

SECTION C: **To be completed when a project is a public works pursuant to ORS 279C.800(6)(a)(C)** (a project for the construction of a privately owned road, highway, building, structure or improvement of any type **that uses funds of a private entity and in which 25 percent or more of the square footage of the completed project will be occupied or used by a public agency**).

Total square footage of privately owned road, highway, building, structure or improvement: _____

Percent of total square footage of the completed project that will be occupied or used by a public agency: _____

Date the public agency or agencies entered into an agreement to occupy or use the completed project: _____

SECTION D: **To be completed when a project is a public works pursuant to ORS 279C.800(6)(a)(D)** (a project that includes the construction or installation of a **device, structure or mechanism that uses solar radiation** on public property, regardless of project cost or whether the project uses funds of a public agency).

Date the public agency entered into an agreement for the project: _____

SECTION E: **To be completed when a project is a public works pursuant to ORS 279C.800(6)(a)(E)** (a project for the construction, reconstruction, major renovation or painting of a road, highway, building, structure, or improvement of any type that occurs, with or without using funds of a public agency, **on real property that a public university listed in ORS 352.002 owns**).

Date the public agency entered into an agreement for the project: _____

Signature of agency representative completing form: _____

Printed Name: _____ Phone: _____ Date: _____

Email Address: _____

THIS FORM WILL BE RETURNED TO THE PUBLIC AGENCY FOR CORRECTION AND RESUBMITTAL IF INCOMPLETE.

RETURN THIS COMPLETED FORM TO:
Prevailing Wage Rate Unit • Bureau of Labor and Industries • 800 NE Oregon Street, #1045 • Portland, OR 97232-3601
Telephone (971) 673-0852 • FAX (971) 673-0769 • pwremail@boli.state.or.us

PLANNED PUBLIC IMPROVEMENT SUMMARY

FISCAL YEAR: _____ - _____ _____ **PAGE** _____ **OF** _____

(Name of State or Local Government Agency)

Project Number, if applicable	Project Name	Project Location	Estimated Total On-site Construction Costs	Work Performed by Contractor or Agency?

ORS 279C.305 requires that not less than 30 days prior to adoption of its budget for the subsequent budget period, or before starting to construct a public improvement, each contracting agency shall prepare and file with the Commissioner of the Bureau of Labor and Industries a list of every public improvement that the contracting agency plans to fund in the budget period, identifying each improvement by name and estimating the total on-site construction costs. The list must also state whether the contracting agency intends to perform the construction through a private contractor. If the contracting agency intends to use the contracting agency's own equipment or personnel to perform construction work on a public improvement, and the estimated value of the construction work that the contracting agency intends to perform with the contracting agency's own equipment or personnel exceeds $200,000 (or $125,000 if the public improvement involves the resurfacing of highways, roads or streets at a depth of two or more inches), the contracting agency shall file with the commissioner not later than 180 days before construction begins on the public improvement an analysis that shows that the contracting agency's decision conforms to the state's policy that contracting agencies make every effort to construct public improvements at the least cost to the contracting agency. Public agencies are required to keep and preserve a full, true and accurate account of the costs of performing the work, including all categories of costs described in ORS 279C.305(3)(b). The final account of the costs is a public record.

This form (WH-118) may be used to list planned public improvements. Form WH-119 (Public Improvement Project Cost Analysis) may be used to report the agency's cost analysis.

Completed forms should be mailed to:

Prevailing Wage Rate Unit
Wage and Hour Division, #1045
Bureau of Labor and Industries
800 N.E. Oregon St.
Portland, OR 97232-2180

_____
(Name of Agency Official)

_____
(Signature of Agency Official)

PUBLIC IMPROVEMENT PROJECT COST ANALYSIS

Contracting Agency: _____ **Project Name/Number:** _____

Department: _____ **Estimated Construction Period:** _____

ESTIMATED CONTRACTOR COSTS				
Item Description	Estimated Quantity	Unit Cost	Total Estimated Cost Per Item	
				TOTAL OF ALL CONTRACTOR COSTS
				$

ESTIMATED CONTRACTING AGENCY COSTS						
Labor	Equipment	Administration and Overhead	Tools and Materials	Cost of Any Contracts Agency Must Enter	Quality Control Testing	Any Other Necessary and Related Costs
						TOTAL OF ALL PUBLIC AGENCY COSTS
						$

The above-named agency has determined that this project can be performed at the least cost by: _____ Agency _____ Contractor (check one)

ORS 279C.305 requires that not less than 30 days prior to adoption of its budget for the subsequent budget period, or before starting to construct a public improvement, each contracting agency shall prepare and file with the Commissioner of the Bureau of Labor and Industries a list of every public improvement that the contracting agency plans to fund in the budget period, identifying each improvement by name and estimating the total on-site construction costs. The list must also state whether the contracting agency intends to perform the construction through a private contractor. If the contracting agency intends to use the contracting agency's own equipment or personnel to perform construction work on a public improvement, and the estimated value of the construction work that the contracting agency intends to perform with the contracting agency's own equipment or personnel exceeds $200,000 (or $125,000 if the public improvement involves the resurfacing of highways, roads or streets at a depth of two or more inches), the contracting agency shall file with the commissioner not later than 180 days before construction begins on the public improvement an analysis that shows that the contracting agency's decision conforms to the state's policy that contracting agencies make every effort to construct public improvements at the least cost to the contracting agency. Public agencies are required to keep and preserve a full, true and accurate account of the costs of performing the work, including all categories of costs described in ORS 279C.305(3)(b). The final account of the costs is a public record. Form WH-118 (Planned Public Improvement Summary) may be used to list planned public improvements. This form (WH-119) may be used to report the agency's cost analysis.

Completed forms should be mailed to:

Prevailing Wage Rate Unit
Wage and Hour Division, #1045
Bureau of Labor and Industries
800 N.E. Oregon St.
Portland, OR 97232-2180

_____
(Name of Agency Official)

_____
(Signature of Agency Official)

The 2018 edition of the ***Prevailing Wage Rate Laws Handbook*** are now available. One complimentary hard copy of each Prevailing Wage Rate (PWR) publication is available upon request by emailing BOLI at pwremail@boli.state.or.us or calling (971) 673-0838. Additional copies are available at cost, plus postage.

In addition to providing this and other PWR publications, the Bureau of Labor and Industries' PWR Unit regularly offers free, informational seminars for both public agencies and contractors. The current schedule is available online at http://www.oregon.gov/boli/WHD/PWR/docs/pwrsched.pdf.

Prior to responding below, please consider that all PWR-related information is available online at http://www.oregon.gov/BOLI/WHD/PWR/Pages/index.aspx. If you are interested in receiving the handbook and/or being included on our mailing lists for future seminar notifications, please complete the form below and return it to the bureau's PWR Unit. You may mail this form to the address on the opposite side of the form, or fax it to (971) 673-2372.

☐ Please send me the 2018 edition of the ***Prevailing Wage Rate Laws Handbook***.

☐ Please add me to the mailing list to receive information about BOLI PWR seminars.

☐ Please add me to the e-mailing list to receive information about BOLI PWR seminars.

_____

AGENCY OR CONTRACTOR BUSINESS NAME and PHONE NUMBER (Required)

_____

AGENCY OR CONTRACTOR BUSINESS E-MAIL ADDRESS (Please print clearly)

_____

MAILING ADDRESS

_____

CITY, STATE, ZIP

_____

NAME OF REPRESENTATIVE and PHONE NUMBER if different from above.

place
stamp
here

BOLI - PREVAILING WAGE RATE UNIT
800 NE OREGON #1045
PORTLAND, OR 97232

DUMPSTERS
POTENTIAL JOB OFFICES. 10,000 SF NEEDED.
POTENTIAL CREW SHACKS. 10,000 SF NEEDED.
VEHICLE ACCESS FOR SUPPLIES & WASTE
POTENTIAL STAGING 45,000 SF NEEDED.
SECURITY FENCE
STAIR TOWERS
POTENTIAL ALLIANCE BUILDING SITE
POTENTIAL PARKING 70,000 SF NEEDED FOR 200.

Project Name

EXHIBIT #7: COST DEFINITION FOR GMP SUBCONTRACTS

Revision 2017

COST PLUS SUBCONTRACT TERMS AND CONDITIONS

Forming a part of the _____ subcontract agreement between Andersen Construction, hereinafter called Contractor, and _____, hereinafter called Subcontractor, for the construction of _____.

1) DESIGN

The Subcontractor shall design all scopes of work related to _____ with the _____ Engineer, prepare "as-built" drawings showing the extent and location of all _____. Obtain all necessary approvals of the Owner, Architect and General Contractor and secure necessary permits. The Subcontractor shall carefully study all proposed materials and methods and make any suggestions they deem consistent with sound practice which might effect "value engineering" savings for the Owner. Subcontractor shall provide complete design and coordination for a lump sum of _____.

2) COST CONTROL

The Subcontractor will prepare a budget and cost plus fee total to perform the _____ work shown on the drawings and specifications. This budget figure shall be known as the Guaranteed Maximum Price, and shall include the costs of all materials, labor, equipment, and profit and overhead fees. It is agreed that the Guaranteed Maximum Price includes only that work defined on the drawings and in the specifications. The Subcontractor shall promptly advise the General Contractor of all changes in the Guaranteed Maximum Price caused by design changes at the earliest possible date.

3) COST DEFINITION

Costs shall be the net cost to the Subcontractor after all trade rebates and bulk quantity discounts, of all materials actually delivered and incorporated into the work; the net costs of all special hoisting and handling equipment used and required in the performance of the work; the net costs of trucking and delivery of materials and equipment only. Materials from the Subcontractor's own warehouse shall be kept to the minimum unless there is a proven advantage in price to use such materials. Permits shall be charged at actual cost. All labor shall be charged at actual cost of base labor rate, and fringe benefits, with a fixed percentage allowed for payroll taxes, as follows:

a) Base rate at actual per hour cost:

Foreman
Journeyman
Apprentice

b) Fringe benefits at actual per hour cost:

1.	Pension	$
2.	Health & Welfare	$
3.	Apprenticeship	$
4.		$
5.		$

c) Payroll taxes and miscellaneous expenses at 100% of Item 'a' above, Base Rate per Hour, broken down as follows:

1.	FICA	$
2.	State Unemployment	$
3.	Federal Unemployment	$
4.	NEBF	$
5.	Tri-Met	$
6.	Liability Ins.	$
7.	Workers Comp. Ins.	$
8.		$
9.		$
10.		$

TOTAL % OF BASE HOURLY RATE: _____ %

It is agreed that this percentage rate shall be used for the purpose of monthly billing only. At the conclusion of the project, all of the items, which have been charged through this percentage factor, shall be audited by the Subcontractor to determine actual costs. If the actual cost of these items exceeds the amounts paid through the percentage factor, the shortage shall be paid to the Subcontractor. If the actual cost is less than the amount paid through the percentage factor, the excess shall be refunded to the General Contractor. The Owner and Andersen Construction Co., Inc. reserve the right to review all cost records pertinent to this project, and to conduct an independent audit of the Subcontractor records at any time up to twenty-four (24) months following the formal completion and acceptance of the job.

If it becomes expedient to perform certain fabrication work at the Subcontractor shop, the General Contractor shall be advised prior to commencing such work.

d) Equipment rental rates for Subcontractor, or subsidiary company, owned equipment will be:

EQUIPMENT	DAY	RATE PER WEEK	MONTH
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			

Equipment shall be charged at the best price advantage rates for the project Owner, equipment parked at the job site will NOT be charged to the project costs.

4) COSTS TO BE REIMBURSED

Costs to be reimbursed are as follows:

a) Wages paid for labor in the direct employ of the Subcontractor in the performance of the Work under applicable collective bargaining agreements, or under a salary or wage schedule agreed upon by the Contractor and Subcontractor, and including such welfare or other benefits, if any, as may be payable with respect thereto.

b) Cost of contributions, assessments or taxes incurred during the performance of the Work for such items as unemployment compensation and social security, insofar as such cost is based on wages, salaries, or other remuneration paid to employees of the Subcontractor and included in the Cost of the Work under Paragraph 4.a.

c) The portion of reasonable travel and subsistence expenses of the Subcontractor or of his officers or employees incurred while traveling in discharge of duties connected with the Work.

d) Cost of all materials, supplies and equipment incorporated in the Work, including costs of transportation thereof.

e) Payments made by the Subcontractor to Sub-subcontractors for Work performed pursuant to Subcontracts under this Agreement.

f) Cost, including transportation and maintenance, of all materials, supplies, equipment, temporary facilities, which are consumed in the performance of the Work, and cost less salvage value on such items used but not consumed which remain the property of the Subcontractor.

g) Rental charges of all necessary machinery and equipment, exclusive of hand tools, used at the site of the Work, whether rented from the Subcontractor or others, including installation, minor repairs and replacements, dismantling, removal, transportation and delivery costs thereof, at rental charges consistent with those prevailing in the area.

h) Cost of premiums for all bonds and insurance which the Subcontractor is required by the Contract Documents to purchase and maintain.

i) Sales, use or similar taxes related to the Work and for which the Subcontractor is liable imposed by any governmental authority.

j) Permit fees, royalties, damages for infringement of patents and costs of defending suits therefor, and deposits lost for causes other than the Subcontractor's negligence.

k) Losses and expenses, not compensated by insurance or otherwise, sustained by the Subcontractor in connection with the Work, provided they have resulted from causes other than the fault or neglect of the Subcontractor. Such losses shall include settlements made with the written consent and approval of the Contractor. No such losses and expenses shall be included in the Cost of the Work for the purpose of determining the Subcontractor's Fee. If, however, such loss requires reconstruction and the Subcontractor's Fee. If, however, such loss requires reconstruction and the Subcontractor is placed in charge thereof, he shall be paid for his services a Fee proportionate to that stated in Paragraph 6, Fees. (See also Paragraph 5.j)

l) Minor expenses such as telegrams, long distance telephone calls, telephone service at the site, expressage, and similar petty cash items in connection with the Work.

m) Cost of removal of all debris.

n) Costs incurred due to an emergency affecting the safety of persons and property.

o) Other costs incurred in the performance of the Work if and to the extent approved in advance in writing by the Contractor.

There shall be no charge to the project for the purchase or rent of normal "tools of the trade" such as drills, hand tools, pipe benders and threaders.
There shall be no charge for service vans, pickups or runabout trucks used at the site, except ONE pickup truck which will be charged to the job.

5) COSTS NOT TO BE REIMBURSED

Costs not to be reimbursed are as follows:

a) The term cost of the Work shall not include any of the items set forth below in this Paragraph 5.

b) Salaries or other compensation of the Subcontractor's personnel at the Subcontractor's principal office and branch offices.

c) Expenses of the Subcontractor's principal and branch offices other than the field office.

d) Any part of the Subcontractor's capital expenses, including interest on the Subcontractor's capital employed for the Work.

e) Except as specifically provided for in Subparagraph 4.g or in modifications thereto, rental costs of machinery and equipment.

f) Overhead or general expenses of any kind, except as may be expressly included in Paragraph 4.

g) Costs due to the negligence of the Subcontractor, any Sub-subcontractor, anyone directly or indirectly employed by any of them, or for whose acts any of them may be liable, including but not limited to the correction of defective or non-conforming Work, disposal of materials and equipment wrongly supplied, or making good any damage to property.

h) The cost of any item not specifically and expressly included in the items described in Paragraph 4.

i) Costs in excess of the Guaranteed Maximum Cost, if any, as set forth in Paragraph 8.

j) Insurance claim deductible costs in excess of $1,000.00 aggregate total for all claims made during the life of this agreement.

6) LUMP SUM FEES

For administrative overhead, design assistance, supervision, profit and all other items excluded from, or not defined as cost in Paragraph 3, the Subcontractor shall be paid a Lump Sum Fee of ___% of total cost.

7) PAYMENTS

Payments shall be made to the Subcontractor in accordance with Article 2 of the Subcontract Agreement. Supporting information in the form of copies of invoices, for materials and equipment rentals, and Form GPP 18A for labor and fringe benefits shall be submitted with each progress billing in support of ALL claimed costs. At no time shall the project be billed for more than the Guaranteed Maximum Price approved and in effect at that time. Final payment shall not be paid until all as-built drawings, equipment maintenance manuals, etc., have been received, and the project has been completed and accepted by the Architect, General Contractor and Owner.

8) GUARANTEED MAXIMUM PRICE

The Guaranteed Maximum Price is $ To be negotiated and inserted at a later date.

Andersen Construction
EXHIBIT #8: DESIGN BUILD REQUIREMENTS

Revision 2017

The below provisions supplement and do not supplant the terms and conditions contained in the Subcontract Agreement by and between Subcontractor and Andersen Construction ("Contractor"). In the event any provisions of this supplement conflict or are at odds with the Subcontract Agreement ("Agreement"), the stricter provisions shall control.

In addition to all other duties and responsibilities under the Subcontract Agreement, Design/Build Subcontractor shall provide and retain responsibility for all of the following:

Contractor has agreed in its Prime Contract with the Owner to procure the services of licensed design professionals to provide the architectural and engineering Work required to design the Project in accordance with the Owner's requirements as set forth in the Prime Contract and other data defining the Project. The person or entity providing architectural and/or engineering Work shall be referred to as Subcontractor.

Article 1 - Responsibilities

1.1. Subcontractor shall include in their scope design and installation coordination and responsibility for all equipment supplied by the Owner and as otherwise covered by Subcontractor's trade. Subcontractor will assume responsibility for intermeshing and coordinating design with Owner furnished equipment.

1.2. Subcontractor shall schedule and provide all start up, commissioning and training for systems supplied and/or installed by Subcontractor. Subcontractor shall provide sequence of operation for individual systems for use in startup and commissioning and Owner's long-term understanding and use of system.

1.3. Agreement Scope of Work, as generally described in the Contract Documents comprising the Agreement shall also include all items necessary for the proper design, procurement, fabrication and installation of the Work. Work not described in the Agreement is not required unless it is consistent therewith and is reasonably inferable therefrom as being necessary to produce the intended results.

1.4. Subcontractor is responsible for the intermeshing and coordination of the various parts of the Work, including the design elements. Subcontractor agrees and acknowledges that no part of the Work shall be left in an unfinished or incomplete condition due to any disagreement as to where the scope of Work for Subcontractor begins and ends with relation to the work of other trades. Subcontractor shall prepare coordination drawings showing exact alignment, physical location and other required details for those portions of its Scope of Work that must be coordinated with the Work of Contractor, Owner, or their other contractors and shall participate in any related coordination efforts by Contractor. Subcontractor recognizes and agrees that its failure to account for other elements included in the Project design may cause costly redesign and/or rework for which Subcontractor may be responsible.

1.5. Subcontractor shall carefully study and compare the contract documents as prepared by other trades and shall at once report to Contractor any error, inconsistency or omissions it may or reasonably should discover. Subcontractor shall be liable for any added costs or damage resulting from its performance of any Work involving an error, inconsistency, omission or ambiguity in the Contract Documents that has not been reported to Contractor as required by this section, including any re-performance and related costs of correction and any additional costs incurred by the Contractor.

1.6. Subcontractor accepts the fiduciary relationship of trust and confidence established by this Subcontract and covenants with Contractor to cooperate and exercise the Subcontractor's skill and judgment in furthering the interests of Contractor. The Subcontractor represents

that it possesses the requisite skill, expertise and licensing to perform the required design and professional services ("Work"). The Contractor and Subcontractor agree to work together on the basis of mutual trust, good faith and fair dealing, and shall take actions reasonable necessary to enable each other to perform this Subcontract in a timely, efficient and economically manner.

1.7. Owner is an intended third party beneficiary of this Subcontract. Subcontractor shall owe to Owner and Contractor a professional standard of care. Subcontractor shall be responsible for all Work provided hereunder, whether such Work is provided directly by Subcontractor or by any consultant(s) hired by Subcontractor.

Article 2 - Design Requirements

2.1. Subcontractor shall provide drawings and specifications complete and adequate in all details to allow procurement and installation to proceed expeditiously and with minimal need for clarifications.

Subcontractor shall provide narratives and sequence of operation documents for the Owner's review and use during startup and training. Narratives and Sequence of Operations are to be included in the Operations and Maintenance manuals for the project.

2.2. Subcontractor/Consultant shall perform the design services using the standards of care, skill and diligence normally provided by a professional in the performance of such services similar to that contemplated for this project. In the event of Subcontractor's failure to observe and adhere to such standard, at the sole discretion of Contractor, Subcontractor shall, upon notice from Contractor, promptly redesign to correct the defect at Subcontractor's sole cost.

2.3. Designer of record shall visit the site periodically during installation of work to perform site observations and to recommend to Contractor rejection of work that does not conform to the drawings, specifications or design intent.

2.4. Should Subcontractor's Work require the production of Construction Documents, the Construction Documents shall be in the form and quantity called for in the Contract Documents and shall be prepared, as applicable, by a design professional licensed in the province required by the Contract Documents and be certified as complying with all applicable codes as required by the Contract Documents and governing agencies. In addition to the quantity called for in the Contract Documents, the Subcontractor agrees to provide additional sets of these documents as may be necessary in connection with design reviews and approvals that may be required in connection with the Project. The Subcontractor shall investigate existing conditions or facilities, make measured drawings thereof, and verify the accuracy of drawings or other information furnished by others.

2.5. Subcontractor shall provide a set of reproducible record drawings showing significant changes in the Work made during the construction process, based on marked-up prints reviewed and approved by Contractor.

2.6. Subcontractor shall furnish to Contractor an appropriate Professional Liability Certificate, including any endorsements directly relating to the Project as specified in the Subcontract Agreement, Article 13. Production of such Certificate shall be a condition precedent to any payment due to Subcontractor from Contractor.

2.7. Subcontractor indemnity obligations hereunder shall parallel those within the Subcontract Agreement and shall also include all claims and losses arising from any acts, errors or omissions of Subcontractor in the performance of professional services hereunder.

2.8. All design shall be done in accordance with all applicable federal, state and local building codes, laws and regulations. Subcontractor shall perform all services in a timely manner and in accordance with the generally accepted standards of care for the profession and the community in which the work is to be done. Notwithstanding the foregoing, if the

Contract Documents contain performance standards for aspects of the Work, the Subcontractor agrees it will perform all applicable Work to achieve such standards.

2.9. Subcontractor acknowledges that budget limitations are not a justification for the breach of sound principles of professional design. Subcontractor shall not perform any additional Work or make any changes to the Construction Documents requested by anyone other than Contractor without the written consent of Contractor. Subcontractor shall not be entitled to any additional compensation or time for performance and shall be liable to Contractor for all increased construction costs in the event it violates the requirements of this Subcontract. Subcontractor shall in the performance of its Work, exert its best, professional skill and effort to minimize Project field construction costs through efficient design methods, measures and means. In the event further Work is required to reduce field construction costs, Subcontractor shall perform those Work at its sole cost.

2.10. Contractor shall receive ownership of the property rights, including copyrights, of all documents, drawings, specifications, electronic data and information ("Construction Documents") prepared, provided or procured by Subcontractor or by consultant(s) retained by Subcontractor and distributed to Contractor for this Project upon making final payment to Subcontractor or in the event of termination upon payment of sums due Subcontractor.

2.10.1. In the event of termination of this Subcontract, Contractor shall the right to use, to reprocure, to reproduce and to make derivative works of the Construction Documents to complete the Project regardless of whether there has been a transfer of copyright.

2.10.2. After completion of the Project, Contractor or Owner may reuse, reproduce or make derivative works of the Construction Documents solely for the purposes of maintaining, renovating or remodeling or expanding the Project. Contractor's or Owner's use of the Construction Documents without the Subcontractor's involvement or on other projects, is at the Contractor's or Owner's sole risk, except for Subcontractor's confidentiality obligations, the Contractor and Owner shall indemnify and hold harmless the Subcontractor and its consultant(s) and the agents, officers, directors and employees of each of them from and against and all claims, damages, losses, costs and expenses, including reasonable attorneys' fees and costs arising out of or resulting from such use.

2.10.3. All business and technical information transmitted in connection with the performance of this Subcontract by Contractor to Subcontractor or shall be considered proprietary and Subcontractor agrees that during the term of this Subcontract, and for a period of three (3) years following the date of the termination of this Subcontract, Subcontractor shall not use such information except for purposes of its business relationship with the Contractor party and shall not disclose any information to any third party other than to Owner, unless such disclosure is approved in writing by an authorized representative of Contractor

2.11. Subcontractor shall perform its obligations with integrity. Conflicts of interest shall be avoided or disclosed promptly to the Contractor.

SAMPLE CERTIFICATE OF INS - SUBCONTRACT VALUE - $10M OR MORE

ACORD

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) mm/dd/yyyy

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER License # xxxxxxx Name of Insurance Broker Street Address City, State, Zip code	CONTACT NAME: PHONE (A/C, No, Ext): (xxx) xxx-xxxx FAX (A/C, No): (xxx) xxx-xxxx E-MAIL ADDRESS:
INSURED Subcontractor Name Street Address City, State Zip Code	INSURER(S) AFFORDING COVERAGE — NAIC # INSURER A : ABC Insurance Company — xxxxx INSURER B : DEF Insurance Company — xxxxx INSURER C : GHI Insurance Company — xxxxx INSURER D : XYZ Insurance Company — xxxxx INSURER E : INSURER F :

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY [ ] CLAIMS-MADE [X] OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: [ ] POLICY [X] PRO-JECT [ ] LOC [ ] OTHER:	X	X	GLXXX	mm/dd/yy	mm/dd/yy	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ 1,000,000 $ 100,000 $ 5,000 $ 1,000,000 $ 2,000,000 $ 2,000,000
A	AUTOMOBILE LIABILITY X ANY AUTO [ ] OWNED AUTOS ONLY [ ] SCHEDULED AUTOS [ ] HIRED AUTOS ONLY [ ] NON-OWNED AUTOS ONLY	X	X	CAXXX	mm/dd/yy	mm/dd/yy	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ 1,000,000 $ $ $
B	[ ] UMBRELLA LIAB [X] OCCUR X EXCESS LIAB [ ] CLAIMS-MADE [ ] DED [ ] RETENTION $	X	X	EX-XXX	mm/dd/yy	mm/dd/yy	EACH OCCURRENCE AGGREGATE	$ 4,000,000 $ 4,000,000
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y / N [ ] (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N / A	X	WCXXX	mm/dd/yy	mm/dd/yy	X PER STATUTE [ ] OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ 1,000,000 $ 1,000,000 $ 1,000,000
C	Professional Liab.		X	PROFXXX	mm/dd/yy	mm/dd/yy	Limit*	$2,000,000
D	Pollution Liability	X	X	POLLXXX	mm/dd/yy	mm/dd/yy	Limit**(per claim/agg)	$5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

For All Work on Project Name and Project #

Additional Insured - Contractor and Owner are additional insureds under Subcontractor's policies. Policies shall be primary and non-contributing with any insurance maintained by the Contractor or the Owner.

The General Liability additional insured form issued by the Subcontractor's insurer shall be written on a CG 20 10 11 85 form, or its equivalent, and shall apply to liability arising out of the Subcontractor's ongoing operations and completed operations.

CERTIFICATE HOLDER

Andersen Construction Company

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

SIGNED BY AUTHORIZED REPRESENTATIVE

© 1988-2015 ACORD CORPORATION. All rights reserved.

The ACORD name and logo are registered marks of ACORD

AGENCY CUSTOMER ID: _____

LOC #: _____

ADDITIONAL REMARKS SCHEDULE

AGENCY	License # 0726293	NAMED INSURED
Name of Insurance Broker		Subcontractor Name Street Address City, State Zip Code
POLICY NUMBER		
SEE PAGE 1		
CARRIER	NAIC CODE	
SEE PAGE 1	SEE P 1	EFFECTIVE DATE: SEE PAGE 1

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: ACORD 25 FORM TITLE: Certificate of Liability Insurance

If subcontractor is enrolled in an OCIP, General Liability and Excess Liability apply to offsite coverage only.

Waiver of Subrogation - Where permitted by law, a waiver of subrogation endorsement shall be issued by Subcontractor's insurer in favor of the Contractor and the Owner.

The Commercial General Liability, Automobile Liability, Pollution Liability, if applicable, and Umbrella Excess Liability certificates must list the Project Name and Project Number.

No policy maintained by subcontractor on a residential project may contain a residential exclusion unless subcontractor is insured under a Wrap-Up.

*Professional Liability Minimum Limit Requirement, if subcontractors work includes professional or design service:
- $2,000,000 or more subcontract value: $2,000,000 per claim/$2,000,000 aggregate

- Sample Professional Liability Wording (Or similar language Included on coverage form or by endorsement)

We waive our right(s) of recovery against any person or organization included in the definition of an Insured or against the Insured's Clients, if prior to a Professional Liability Claim, a waiver of subrogation was so required and accepted under a specific contractual undertaking by the Insured.

**Pollution Liability Minimum Limit Requirement, if subcontractors work includes these scopes:
- Demolition or any type of abatement of lead, mold, or asbestos: $5,000,000
- Excavation or Other Soils Work/Fluids or Water/Sewer/Building Envelope/Pollution Material: $2,000,000
- All Others: $1,000,000

- Sample Pollution Liability Wording - (Or similar language included on coverage form or by endorsements)

What We Cover: Pollution Loss Coverage:
When the Named Insured is required by contract, agreement, or permit to include any person or entity as an additional insured, such coverage shall be provided on a primary and non-contributory basis.

Pollution Loss Coverage:
We waive our right(s) of recovery against any person or organization included in the definition of an Insured or against the Insured's Clients if prior to the Pollution Claim, a waiver of subrogation was required and accepted under a specific contractual undertaking by the Insured.

© 2008 ACORD CORPORATION. All rights reserved.

The ACORD name and logo are registered marks of ACORD

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

ADDITIONAL INSURED – OWNERS, LESSEES OR CONTRACTORS – (FORM B)

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART.

SCHEDULE

Name of Person or Organization:

AS REQUIRED BY WRITTEN CONTRACT

(If no entry appears above, information required to complete this endorsement will be shown in the Declarations as applicable to this endorsement.)

WHO IS AN INSURED (Section II) is amended to include as an insured the person or organization shown in the Schedule, but only with respect to liability arising out of "your work" for that insured by or for you.

 Copyright, Insurance Services Office, Inc., 1984 ☐

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

PRIMARY AND NONCONTRIBUTORY - OTHER INSURANCE CONDITION

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART
PRODUCTS/COMPLETED OPERATIONS LIABILITY COVERAGE PART

The following is added to the **Other Insurance** Condition and supersedes any provision to the contrary:

Primary And Noncontributory Insurance

This insurance is primary to and will not seek contribution from any other insurance available to an additional insured under your policy provided that:

(1) The additional insured is a Named Insured under such other insurance; and

(2) You have agreed in writing in a contract or agreement that this insurance would be primary and would not seek contribution from any other insurance available to the additional insured.

 © Insurance Services Office, Inc., 2012

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

WAIVER OF TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US

This endorsement modifies insurance provided under the following:
COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE

Name of Person or Organization:

AS REQUIRED BY WRITTEN CONTRACT

(If no entry appears above, information required to complete this endorsement will be shown in the Declarations as applicable to this endorsement.)

The TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US Condition (Section **IV** - COMMERCIAL GENERAL LIABILITY CONDITIONS) is amended by the addition of the following:

We waive any right of recovery we may have against the person or organization shown in the Schedule above because of payments we make for injury or damage arising out of your ongoing operations or "your work" done under a contract with that person or organization and included in the "products-completed operations hazard" This waiver applies only to the person or organization shown in the Schedule above.

 Copyright, Insurance Services Office, Inc., 1992

POLICY NUMBER:

COMMERCIAL AUTO
CA 20 48 02 99

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

DESIGNATED INSURED

This endorsement modifies insurance provided under the following:

BUSINESS AUTO COVERAGE FORM
GARAGE COVERAGE FORM
MOTOR CARRIER COVERAGE FORM
TRUCKERS COVERAGE FORM

With respect to coverage provided by this endorsement, the provisions of the Coverage Form apply unless modified by this endorsement.

This endorsement identifies person(s) or organization(s) who are "insureds" under the Who Is An Insured Provision of the Coverage Form. This endorsement does not alter coverage provided in the Coverage Form.

This endorsement changes the policy effective on the inception date of the policy unless another date is indicated below.

Endorsement Effective:	Countersigned By:
Named Insured:	(Authorized Representative)

SCHEDULE

Name of Person(s) or Organization(s) :
AS REQUIRED BY WRITTEN CONTRACT

(If no entry appears above, information required to complete this endorsement will be shown in the Declarations as applicable to the endorsement.)

Each person or organization shown in the Schedule is an "insured" for Liability Coverage, but only to the extent that person or organization qualifies as an "insured" under the Who Is An Insured Provision contained in **Section II** of the Coverage Form.

© Insurance Services Office, Inc., 1998

©Insurance Services Office, Inc.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

WAIVER OF TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US (WAIVER OF SUBROGATION)

This endorsement modifies insurance provided under the following:

AUTO DEALERS COVERAGE FORM
BUSINESS AUTO COVERAGE FORM
MOTOR CARRIER COVERAGE FORM

With respect to coverage provided by this endorsement, the provisions of the Coverage Form apply unless modified by the endorsement.

This endorsement changes the policy effective on the inception date of the policy unless another date is indicated below.

Named Insured:
Endorsement Effective Date:

SCHEDULE

Name(s) Of Person(s) Or Organization(s):
AS REQUIRED BY WRITTEN CONTRACT
Information required to complete this Schedule, if not shown above, will be shown in the Declarations.

The **Transfer Of Rights Of Recovery Against Others To Us** condition does not apply to the person(s) or organization(s) shown in the Schedule, but only to the extent that subrogation is waived prior to the "accident" or the "loss" under a contract with that person or organization.

 © Insurance Services Office, Inc., 2011

(Ed. 4-84)

WAIVER OF OUR RIGHT TO RECOVER FROM OTHERS ENDORSEMENT

We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule. (This agreement applies only to the extent that you perform work under a written contract that requires you to obtain this agreement from us.)

This agreement shall not operate directly or indirectly to benefit anyone not named in the Schedule.

Schedule

AS REQUIRED BY WRITTEN CONTRACT

This endorsement changes the policy to which it is attached and is effective on the date issued unless otherwise stated.

(The information below is required only when this endorsement is issued subsequent to preparation of the policy.)

Endorsement Effective Policy No. Endorsement No.
Insured Premium

Insurance Company Countersigned by_____

© 1983 National Council on Compensation Insurance.

SAMPLE CERTIFICATE OF INS - SUBCONTRACT VALUE - UNDER $10M

ACORD

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) mm/dd/yyyy

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER License # xxxxxxx Name of Insurance Broker Street Address City, State, Zip code	CONTACT NAME: PHONE (A/C, No, Ext): (xxx) xxx-xxxx FAX (A/C, No): (xxx) xxx-xxxx E-MAIL ADDRESS:
INSURED Subcontractor Name Street Address City, State Zip Code	INSURER(S) AFFORDING COVERAGE — NAIC # INSURER A : ABC Insurance Company — xxxxx INSURER B : DEF Insurance Company — xxxxx INSURER C : GHI Insurance Company — xxxxx INSURER D : XYZ Insurance Company — xxxxx INSURER E : INSURER F :

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY X PRO-JECT LOC OTHER:	X	X	GLXXX	mm/dd/yy	mm/dd/yy	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ 1,000,000 $ 100,000 $ 5,000 $ 1,000,000 $ 2,000,000 $ 2,000,000
A	AUTOMOBILE LIABILITY X ANY AUTO OWNED AUTOS ONLY SCHEDULED AUTOS HIRED AUTOS ONLY NON-OWNED AUTOS ONLY	X	X	CAXXX	mm/dd/yy	mm/dd/yy	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ 1,000,000 $ $ $
	UMBRELLA LIAB OCCUR EXCESS LIAB CLAIMS-MADE DED RETENTION $						EACH OCCURRENCE AGGREGATE	$ $
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y / N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N / A	X	WCXXX	mm/dd/yy	mm/dd/yy	X PER STATUTE OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	$ 1,000,000 $ 1,000,000 $ 1,000,000
C	Professional Liab.		X	PROFXXX	mm/dd/yy	mm/dd/yy	Limit*	$2,000,000
D	Pollution Liability	X	X	POLLXXX	mm/dd/yy	mm/dd/yy	Limit**(per claim/agg)	$5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

For All Work on Project Name and Project #

Additional Insured - Contractor and Owner are additional insureds under Subcontractor's policies. Policies shall be primary and non-contributing with any insurance maintained by the Contractor or the Owner.

The General Liability additional insured form issued by the Subcontractor's insurer shall be written on a CG 20 10 11 85 form, or its equivalent, and shall apply to liability arising out of the Subcontractor's ongoing operations and completed operations.

CERTIFICATE HOLDER

Andersen Construction Company

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

SIGNED BY AUTHORIZED REPRESENTATIVE

© 1988-2015 ACORD CORPORATION. All rights reserved.

The ACORD name and logo are registered marks of ACORD

AGENCY CUSTOMER ID: _____

LOC #: _____

ADDITIONAL REMARKS SCHEDULE

AGENCY	License # 0726293	NAMED INSURED
Name of Insurance Broker		Subcontractor Name Street Address City, State Zip Code
POLICY NUMBER		
SEE PAGE 1		
CARRIER	NAIC CODE	
SEE PAGE 1	SEE P 1	EFFECTIVE DATE: SEE PAGE 1

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: ACORD 25 FORM TITLE: Certificate of Liability Insurance

If subcontractor is enrolled in an OCIP, General Liability applies to offsite coverage only.

Waiver of Subrogation - Where permitted by law, a waiver of subrogation endorsement shall be issued by Subcontractor's insurer in favor of the Contractor and the Owner.

The Commercial General Liability, Automobile Liability, Pollution Liability, if applicable, and Umbrella Excess Liability certificates must list the Project Name and Project Number.

No policy maintained by subcontractor on a residential project may contain a residential exclusion unless subcontractor is insured under a Wrap-Up.

*Professional Liability Minimum Limit Requirement, if subcontractors work includes professional or design service:
- Less than $2,000,000 subcontract value: $1,000,000 per claim/$1,000,000 aggregate
- $2,000,000 or more subcontract value: $2,000,000 per claim/$2,000,000 aggregate

- Sample Professional Liability Wording (Or similar language Included on coverage form or by endorsement)

We waive our right(s) of recovery against any person or organization included in the definition of an Insured or against the Insured's Clients, if prior to a Professional Liability Claim, a waiver of subrogation was so required and accepted under a specific contractual undertaking by the Insured.

**Pollution Liability Minimum Limit Requirement, if subcontractors work includes these scopes:
- Demolition or any type of abatement of lead, mold, or asbestos: $5,000,000
- Excavation or Other Soils Work/Fluids or Water/Sewer/Building Envelope/Pollution Material: $2,000,000
- All Others: $1,000,000

- Sample Pollution Liability Wording - (Or similar language included on coverage form or by endorsements)

What We Cover: Pollution Loss Coverage:
When the Named Insured is required by contract, agreement, or permit to include any person or entity as an additional insured, such coverage shall be provided on a primary and non-contributory basis.

Pollution Loss Coverage:
We waive our right(s) of recovery against any person or organization included in the definition of an Insured or against the Insured's Clients if prior to the Pollution Claim, a waiver of subrogation was required and accepted under a specific contractual undertaking by the Insured.

© 2008 ACORD CORPORATION. All rights reserved.

The ACORD name and logo are registered marks of ACORD

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

ADDITIONAL INSURED – OWNERS, LESSEES OR CONTRACTORS – (FORM B)

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART.

SCHEDULE

Name of Person or Organization:

AS REQUIRED BY WRITTEN CONTRACT

(If no entry appears above, information required to complete this endorsement will be shown in the Declarations as applicable to this endorsement.)

WHO IS AN INSURED (Section II) is amended to include as an insured the person or organization shown in the Schedule, but only with respect to liability arising out of "your work" for that insured by or for you.

 Copyright, Insurance Services Office, Inc., 1984 ☐

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

PRIMARY AND NONCONTRIBUTORY - OTHER INSURANCE CONDITION

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART
PRODUCTS/COMPLETED OPERATIONS LIABILITY COVERAGE PART

The following is added to the **Other Insurance** Condition and supersedes any provision to the contrary:

Primary And Noncontributory Insurance

This insurance is primary to and will not seek contribution from any other insurance available to an additional insured under your policy provided that:

(1) The additional insured is a Named Insured under such other insurance; and

(2) You have agreed in writing in a contract or agreement that this insurance would be primary and would not seek contribution from any other insurance available to the additional insured.

 © Insurance Services Office, Inc., 2012

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

WAIVER OF TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US

This endorsement modifies insurance provided under the following:
COMMERCIAL GENERAL LIABILITY COVERAGE PART

SCHEDULE

Name of Person or Organization:

AS REQUIRED BY WRITTEN CONTRACT

(If no entry appears above, information required to complete this endorsement will be shown in the Declarations as applicable to this endorsement.)

The TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US Condition (Section **IV** - COMMERCIAL GENERAL LIABILITY CONDITIONS) is amended by the addition of the following:

We waive any right of recovery we may have against the person or organization shown in the Schedule above because of payments we make for injury or damage arising out of your ongoing operations or "your work" done under a contract with that person or organization and included in the "products-completed operations hazard" This waiver applies only to the person or organization shown in the Schedule above.

 Copyright, Insurance Services Office, Inc., 1992

POLICY NUMBER:

COMMERCIAL AUTO
CA 20 48 02 99

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

DESIGNATED INSURED

This endorsement modifies insurance provided under the following:

BUSINESS AUTO COVERAGE FORM
GARAGE COVERAGE FORM
MOTOR CARRIER COVERAGE FORM
TRUCKERS COVERAGE FORM

With respect to coverage provided by this endorsement, the provisions of the Coverage Form apply unless modified by this endorsement.

This endorsement identifies person(s) or organization(s) who are "insureds" under the Who Is An Insured Provision of the Coverage Form. This endorsement does not alter coverage provided in the Coverage Form.

This endorsement changes the policy effective on the inception date of the policy unless another date is indicated below.

Endorsement Effective:	Countersigned By:
Named Insured:	(Authorized Representative)

SCHEDULE

Name of Person(s) or Organization(s) :
AS REQUIRED BY WRITTEN CONTRACT

(If no entry appears above, information required to complete this endorsement will be shown in the Declarations as applicable to the endorsement.)

Each person or organization shown in the Schedule is an "insured" for Liability Coverage, but only to the extent that person or organization qualifies as an "insured" under the Who Is An Insured Provision contained in **Section II** of the Coverage Form.

© Insurance Services Office, Inc., 1998

©Insurance Services Office, Inc.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

WAIVER OF TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US (WAIVER OF SUBROGATION)

This endorsement modifies insurance provided under the following:

AUTO DEALERS COVERAGE FORM
BUSINESS AUTO COVERAGE FORM
MOTOR CARRIER COVERAGE FORM

With respect to coverage provided by this endorsement, the provisions of the Coverage Form apply unless modified by the endorsement.

This endorsement changes the policy effective on the inception date of the policy unless another date is indicated below.

Named Insured:
Endorsement Effective Date:

SCHEDULE

Name(s) Of Person(s) Or Organization(s):
AS REQUIRED BY WRITTEN CONTRACT
Information required to complete this Schedule, if not shown above, will be shown in the Declarations.

The **Transfer Of Rights Of Recovery Against Others To Us** condition does not apply to the person(s) or organization(s) shown in the Schedule, but only to the extent that subrogation is waived prior to the "accident" or the "loss" under a contract with that person or organization.

 © Insurance Services Office, Inc., 2011

(Ed. 4-84)

WAIVER OF OUR RIGHT TO RECOVER FROM OTHERS ENDORSEMENT

We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule. (This agreement applies only to the extent that you perform work under a written contract that requires you to obtain this agreement from us.)

This agreement shall not operate directly or indirectly to benefit anyone not named in the Schedule.

Schedule

AS REQUIRED BY WRITTEN CONTRACT

This endorsement changes the policy to which it is attached and is effective on the date issued unless otherwise stated.

(The information below is required only when this endorsement is issued subsequent to preparation of the policy.)

Endorsement Effective Policy No. Endorsement No.
Insured Premium

Insurance Company Countersigned by_____

© 1983 National Council on Compensation Insurance.

Included in this Exhibit are the following documents:

1. Site Specific Safety Plan Outline
2. Safety Data Sheet List
3. Safety Handbook

Complete and submit the Site Specific Safety Plan Outline and the Safety Data Sheet List to the Andersen/ASI Project Superintendent four (4) weeks before mobilizing to the jobsite and update as necessary.

- For projects in Washington State, in accordance with WISHA Regional Directive 27.00 titled “Contractor Responsibility under Stute v. PBMC”, provide a **complete copy** of your company’s Accident Prevention Program (unless a current copy is already on file).

- For projects in California, each employer must provide a copy of your company’s Incident and Injury Prevention Program and the Injury and Illness Prevention Program (I2P2).

Pre-Task Plans (PTP) must be submitted each Monday morning following review with the crew(s). The PTPs for completed work must be submitted at the end of the work week for the applicable crew. These must be submitted on the Project to the Project Superintendent or the Safety Supervisor.

Site Specific Safety Plan Outline

Contractor:	Project: Date: Project Address:
This document should be the ***cover sheet*** for your site specific safety plan. Review the hazard assessment for applicability. For each identified hazard, a job hazard analysis must be developed. The hazards identified may also require special training. The tasks to be done under each identified hazard must have a corresponding Pre-Task Plan.	
Provide a brief description of your scope of work:	

Project Supervisor Contact Information:	
Names & Titles / Roles	**Contact Numbers & Email Addresses:**
Designated Superintendent:	Day: Night: Email:
Foreman:	Day: Night: Email:
Project Manager	Day: Night: Email:
Contact person within your organization that is responsible for injured workers	Day: Night: Email:
Designated Contact for Drug Testing Information	Day: Night: Email:
Designated Site Safety Representative:	Day: Night: Email:

Brief Scope Description (Indicate if any portion of the scope will be subcontracted out to other subcontractors)	
Self-performed work	**Subcontracted work**

Lower – Tier Subcontractor Information (attach a separate list if necessary)	
Contractor: Contractor Address City, State, Zip Phone	Contractor: Contractor Address City, State, Zip Phone
Scope of Work:	Scope of Work:
Do you have a signed agreement with this subcontractor?	Do you have a signed agreement with this subcontractor?
Have you verified that this contractor is properly licensed under the contractor's board if applicable? CCB#	Have you verified that this contractor is properly licensed under the contractor's board if applicable? CCB#
Does this contractor have workers compensation insurance? Carrier Name & Policy #	Does this contractor have workers compensation insurance? Carrier Name & Policy #

Drug Testing Information		
Do you have a written drug and alcohol testing program?	☐ Yes	☐ No
Is your program a collectively bargained program If yes, provide the name of the program and administrator:	☐ Yes	☐ No

Provide the name of the laboratory	What substances are included in the testing?

Does the program include the following testing?	What are the consequences for a worker who fails a drug or alcohol test under the program?
☐ Pre-employment or pre-job placement testing ☐ Post-accident testing ☐ Random testing ☐ Reasonable Suspicion ☐ Follow up testing	

NOTE: Andersen Construction does ***not*** recognize medical marijuana as a prescription for which a positive drug test will be changed to a negative, ***nor*** does Andersen Construction recognize the legalization of marijuana in Washington state as an allowed substance.

Please provide a listing of the employees to be assigned to this project and the date of their last valid drug and alcohol test. (attach a separate sheet if necessary) **This may be provided when employees report for work at this project if you do not yet know who will be working at this jobsite**.

Employee Name:	Date of Test:	Employee Name	Date of Test:

Company Policy Information

Provide information on the following or attach a separate document that addresses the following policy questions.	ATTACHED
Washington Jobsites: Attach a Complete copy of your Accident Prevention Program ☐	Yes ☐
California: Attach a complete copy of your Cal OSHA I2P2 ☐	No ☐
What are your procedures for reporting accidents, near misses and hazards and to whom?	
What are your procedures for inspecting your own employees' work areas?	
Who will be conducting your safety inspections? Provide the schedule.	

How will hazard corrections be completed and documented?

Attach the completed training matrix and documentation of required training for our employees for the tasks that apply to this project's scope of work. For example, if you will have a forklift and operator on site, provide proof of forklift training. If you will be working on scaffolding, provide proof of user or erector training.	Attached: Yes ☐ No ☐
Attach Material Safety Data Sheets – review your MSDS to be used for this project, complete the Hazard Communication Checklist and submit both with this plan	Attached: Yes ☐ No ☐

Hazard Identification

Check Potential Work Hazards:
This list is not all inclusive; it is only a starting point. ***Your site plan must provide applicable work plans, hazard correction and/or control measures for any of these identified potential safety hazards and any others associated with your scope of work not identified here***. The work tasks that have these exposures may be planned, reviewed and documented with a Job Hazard Analysis (JHA), A Pre-Task Plan (PTP) etc., providing it provides enough information.

- ☐ Fall Exposures > 6 feet ***
- ☐ Confined Space Entry ***
- ☐ Excavations > 4 feet ***
- ☐ Energized Electrical Work ***
- ☐ Multi-Level Scaffold Erection
- ☐ Steel Erection ***
- ☐ Mobile Crane(s) Use ***
- ☐ Asbestos Abatement ***
- ☐ Sandblasting
- ☐ Welding / Cutting
- ☐ Welding on Stainless Steel
- ☐ Contaminated Soils
- ☐ Fall Exposures > 4 feet (WA) ***
- ☐ Emergency Response Plan ***
- ☐ Dust Control / Containment(s)
- ☐ Lock Out / Tag Out Activities ***
- ☐ Scaffold Use
- ☐ Precast Erection / Installation
- ☐ Critical Crane Lift(s) ***
- ☐ Lead Installation ***
- ☐ Potential Silica Exposures
- ☐ Interior Spray Finishes
- ☐ Blasting / Use of Explosives
- ☐ UST Removal
- ☐ Fall Rescue Plan (req'd for fp)
- ☐ Concrete Formwork - Elevated
- ☐ ILSM / ICRA Plans ***
- ☐ Structural Demolition ***
- ☐ Mast Climbing Work Platform
- ☐ Residential Construction
- ☐ Rotating Equipment
- ☐ Microbial Abatement ***
- ☐ Traffic Control ***
- ☐ Working Above Others
- ☐ Working in Occupied Buildings
- ☐ Installation of Underground Power - Temporary or Permanent
- ☐ Work Within 20' of Overhead Utilities ***
- ☐ Potential Impact to Underground Utilities ***
- ☐ Working in Client Classified Sensitive Areas
- ☐ Working in a Residential Structure Built Prior to 1978 or a Child Occupied Facility Built Prior to 1978 ***
- ☐ Chemical(s) Regulated by OSHA / OR-OSHA / DOSH / or listed on Andersen Construction Hazard Chemical Checklist

The hazards for our scope of work are identified in our site safety plan and the hazard correction plan(s) are attached:	Attached Yes ☐ No ☐

Task specific Pre-Task Plans (PTPs) must be submitted as your work progresses. PTPs must be reviewed with the persons conducting the work in the field.	
This plan / document was prepared by: **Title:** **Contact Phone:** **Contact Email:**	Date completed:

Safety Data Sheet List

Contractor Name:	**Project:**	Date work scheduled to start: Duration:

Does this listing include the SDS for your lower – tier subcontractors, if applicable? **Yes** ☐ **No** ☐

If no, and you have lower – tier subcontractors, you must attach their site safety plan template, SDS listing, Hazard Communication Checklist and Training Matrix.

Product Name	**Company Name**	**Type of Use**	**Signal Word** (from SDS)	**Hazard Statement** (from SDS)

Contractor Name:	**Project: Name**	Date work scheduled to start:
		Duration:

Does this checklist include the SDS for your lower – tier subcontractors, if applicable? **Yes** ☐ **No** ☐

If no, and you have lower – tier subcontractors, you must attach their site safety plan template, SDS listing, Hazard Communication Checklist and Training Matrix.

1. **<u>Attach the safety data sheets for the chemicals to be used on this project.</u>**
2. **Evaluate your attached material safety data sheets for the following chemicals; identify your products that contain these chemicals.**

CHEMICAL PRODUCT	Examples where chemical product may be found (not a complete list)	PRODUCT CONTAINING SUCH CHEMICAL OR PROCESS CREATING THE EXPOSURE	USE	OSHA Data – Yes / No (Attach)
BANNED PRODUCTS FOR NEW CONSTRUCTION – DO NOT ALLOW! (except lead for shielding / sealing & only under site specific work plan with personnel exposure data and/or protection methods)				
Asbestos	Mastics; roof & exterior wall waterproofing; sheet vinyl; acoustical ceilings & plasters; monokote prior to 1987			
Lead* **(allowed for shielding)**	Lead lined sheetrock			
Benzene (other than gasoline)	Styrene; phenols;			
n-hexane, hexane (severe fire hazard)	Solvent based duct sealants; roofing glues			
THE FOLLOWING PRODUCTS HAVE SUBSTANCE SPECIFIC OSHA REGULATIONS; MONITORING DATA *<u>MUST BE SUBMITTED PRIOR TO USE</u>*				
Cadmium	Metals			
Methylene Chloride or Dichloromethane	Paint remover			
Ethylene Oxide	Anti-freeze			
Formaldehyde	Floor glue			
Methylenedianiline (MDA	Mfg of polyurethane foam; some glues & epoxies			
Vinyl Chloride	Mfg of pvc			
Inorganic Arsenic	Contaminated soils			
MBOCA (4,4-Methylene bis (2-chloroaniline))	Mfg of plastics; coating in chemical reactions to "set" glues, plastics, and adhesives			

CHEMICAL PRODUCT	Examples where chemical product may be found (not a complete list)	PRODUCT CONTAINING SUCH CHEMICAL OR PROCESS CREATING THE EXPOSURE	USE	OSHA Data – Yes / No (Attach)
Coal tar pitch volatiles (creosote)	Contaminated soils; wood preservative; roofing; road paving			
1,2-dibromo-3-chloropropane	Contaminated soil & groundwater; well water near farms			
Acrylonitrile	Used to make plastics, synthetic rubber, and acrylic fibers			
Thiram	Used in agriculture; seed protectant			
1,3-Butadiene	Production of synthetic rubber; contaminated water near mfg plant			
Chromates / Hexavalent Chromium (Chromium VI) * see note below	Chromates found in paints; Stainless steel; portland cement; electroplating; contaminated groundwater			
THE FOLLOWING PRODUCTS MAY CREATE STRONG ODORS & MAY REQUIRE EMPLOYEE MONITORING & PPE SPECIAL PLANNING & VENTILATION MAY BE REQUIRED!				
Methyl Methacrylate	Concrete waterproofing			
Heptane, Toluene, Xylene, Methyl Ethyl Ketone, Acetone,	Paint thinner; lacquer thinner; clear spray sealants; mineral spirits; degreasers			
Naptha, aliphatic or aromatic hydrocarbons ; Petroleum distillates	Oils & lubricants; camp fuel; shoe polish; degreasers; contaminated soils			
Stonhard waterproofers & floor coatings				
Isocyanates ; diisocyanates (methylenebis(phenyl isocyanate) (MDI), toluene diisocyanate (TDI))	Spray on polyurethane; industrial uses to protect cement, polyureathane foam; spray paints; surface coatings; resins			
Roofing Tars				
WELDING / TORCH CUTTING ON ANY OF THE FOLLOWING TYPES OF METALS OR METALS COATED / CLEANED WITH THE FOLLOWING PRODUCTS MAY REQUIRE SPECIAL PLANNING & VENTILATION				
Stainless Steel				
Nickel, chromium, manganese,				
Cadmium (electrical panels)				
Lead	Painted / primed steel			
Chlorinated Solvents	Paint removers;			
Zinc (galvanized metals)	q-deck			

CHEMICAL PRODUCT	Examples where chemical product may be found (not a complete list)	PRODUCT CONTAINING SUCH CHEMICAL OR PROCESS CREATING THE EXPOSURE	USE	OSHA Data – Yes / No (Attach)
THE CREATION OF ANY SILICA DUST, LEAD DUST, BERYLLIUM DUST OR HEXAVALENT CHROMIUM CONTAINING DUSTS REQUIRES CONTROL AND/OR SPECIAL PLANNING & PERSONAL PROTECTION				
Grinding, crushing, chipping of concrete or other cementitious products				
Demolition of painted structures built / painted prior to 1980				
Silica - Dry	Monokote; sandblasting grit;			
Black Beauty (creates beryllium dust during sandblasting)				
Demolition of concrete structures				
REVIEW OF MSDS FOR ANY PRODUCTS WHICH STATE: PRODUCT CAN CAUSE SENSITIZATION OR ALLERGIC REACTIONS OR HYPERSENSITIVITY (such as isocyanates or epoxies)				
PRODUCT	**USE**	**SPRAY APPLIED - YES or NO**		
OTHER PRODUCTS WITH SPECIAL CONCERN				
Non Identified Flammable(s)				

If any of the above-identified products specified by the plan documents please identify. Attach any personnel exposure monitoring for any of the hazardous products you will be using on this jobsite.

*Potential Hexavalent Chromium containing or producing products:

- Ammonium Dichromate; Barium Chromate; Tert-Butyl Chromate; Calcium Chromate; Chromium Trioxide; Chromium (VI) ion; Hexavalent Chromium; Lead Chromate; Potassium Chromate; Potassium Dichromate; Silver Chromate; Sodium Chromate; Sodium Dichromate; Strontium Chromate; Zinc Chromate; Zinc Dichromate

SAFETY HANDBOOK

Version 11 January 2018

Italicized font indicates new or updated content

This page intentionally left blank

TO ALL PROJECT EMPLOYEES:

Andersen's Core Value "*We Do It Safely, Or We Don't Do It",* demonstrates the importance of safety and the expectations Andersen has of its employees and jobsite personnel. Everyone has responsibility for safety – at every level.

Andersen has adopted nine core values that form the backbone of how we conduct ourselves and conduct business. These core values are:

- Establish long term relationships
- The client is number one
- You can bank on our word
- We do everything as a team
- We do it safely, or we don't do it
- We take responsibility
- Everyone is treated as an individual with dignity and respect
- We seek continuous improvement in everything
- We always produce work that makes us proud.

We hope you will commit to being a part of a strong safety culture while working here. We hope that you will choose to work safely, here at Andersen, at home and when working for others; we hope that you will commit to our core values and we hope that you join our team as a safety leader.

Jobsite Safety is up to YOU. Your quality of life is up to YOU.

CONTACT PERSONNEL:

David Andersen, CEO
Joel Andersen, President
Martin Cloe, COO
Vicky Elkin, Corporate Risk Manager
Kimberly Gamble, Safety & Health Director
Travis Baker, Regional Vice President - Oregon
Joel Rohrs, Regional Vice President - Washington

LOCATIONS:

Portland
6712 N Cutter Circle
Portland, OR 97217
Phone: (503) 283-6712

Seattle
5601 6th Avenue S, Suite 550
Seattle, WA 98108
Phone: (206) 763-6712

Boise
12552 West Executive Drive
Boise, ID 86713
Phone: (208) 275-8905

Eugene
309 W 4th Avenue, Suite 201
Eugene, OR 97401
Phone: (541) 735-3525

Corvallis
940 NE Circle Blvd.
Corvallis, OR 97330
Phone: (541) 753-0928

TO REPORT A SAFETY CONCERN, INJURY OR EMERGENCY

Kimberly Gamble, CHST
Safety & Health Director
Cell: (503) 705-6014

Vicky Elkin
Corporate Risk Manager
Cell: (971) 413-2006

HANDBOOK DISCLAIMER 1
INTRODUCTION 2
EMPLOYEE SAFE WORK RESPONSIBILITIES 3
ALCOHOL AND DRUG POLICY STATEMENT 4
INCIDENT REPORTING PROCEDURES 5
ACCIDENT / INCIDENT REPORTING AND RESPONSE 5
ANDERSEN AND ASI EMPLOYEE RESPONSIBILITIES REGARDING ON-THE-JOB INJURIES, NEAR MISSES OR ACCIDENTS 8
MEDICAL SERVICES, FIRST AID & CPR 10
GENERAL JOB SAFETY PROCEDURES 14
Hazard & Accident Reporting 14
Site Access and Management, including Required PPE 14
Cell Phones & Radios 14
Smoking and tobacco use: 15
Hygiene and Sanitation: 15
Daily Safety Planning 16
Equipment and Vehicles: 16
Miscellaneous Rules & Guidelines: 16
WORK PERMITS 18
PERSONAL PROTECTIVE EQUIPMENT 19
Personal Safety Equipment 19
Minimum Jobsite Required Personal Protective Equipment 19
Hard Hats 19
Eye & Face Protection: 19
Clothing 20
Highly Visible Clothing 20
Gloves & Hand Protection: 20
Hearing Protection 21
Legs, Thighs, Knees, Shins, and Ankles 21
Feet and Toes 22
Respiratory Protection 22
FALL PROTECTION, FALLING OBJECT PROTECTION, AND FLOOR HOLES 23
Guardrails: 23
Personal Fall Protection: 24
Warning Lines 27

Scaffold Erection, Use and Fall Protection 27
Fall Protection Near Excavations 27
Falling Object Protection: 28
Floor Hole and Openings and Wall Openings: 29
Additional General Fall Protection Rules: 30
Fall Protection Regulations by State and/or Andersen Rule: 31
STRAINS AND SPRAINS AND BACK INJURY PREVENTION 33
HOUSEKEEPING AND STAGING GENERAL RULES 34
General Housekeeping Rules & Guidelines 34
SIGNS, SIGNALS AND BARRICADES 35
ACCESS & EGRESS 36
LADDERS AND STAIRWAYS 38
Ladders: 38
Stairways 40
SCAFFOLDING AND AERIAL LIFTS 41
MOBILE EQUIPMENT 45
MATERIAL HANDLING AND MATERIAL HANDLING EQUIPMENT 49
CRANES AND RIGGING 50
Cranes 50
TRENCHING, EXCAVATIONS, DRILLING, SAWCUTTING and LOCATES 56
FIRE PREVENTION AND PROTECTION 63
WELDING AND CUTTING 66
TOOLS – HAND AND POWER 67
Power Tools and Extension Cords / Assured Grounding 67
ELECTRICAL 69
Jobsite Lighting 69
Overhead Power 70
Underground Power 70
Temporary Power 70
LOCK-OUT/TAG-OUT 72
ENERGIZED ELECTRICAL WORK 73
CONFINED SPACES 74
DEMOLITION 75
ASBESTOS LEAD AND SILICA 77

Asbestos: 77
Lead: 78
Silica 78
DUST CONTROL 84
TRAFFIC CONTROL 85
EMERGENCIES AND JOBSITE EVACUATIONS 86
HAZARD COMMUNICATION 87
HAZARDOUS MATERIALS & WASTE 90
WASTE & RECYCLING 91
CONSTRUCTION SAFETY RESOURCES 93
DISCIPLINARY POLICY 94

HANDBOOK DISCLAIMER

This safety handbook describes, in summary form, the safety policies and procedures that govern (1) the employment relationship between Andersen Construction Company, LLC, ASI Structures, LLC, and Pacific Data Communications, LLC and their employees (collectively referred to as “Andersen” or “Andersen Employees”); and (2) the working relationship between Andersen and all personnel assigned to work on any Andersen jobsite, including any Andersen Joint Venture jobsite.

The word “employee” as used in this safety handbook is intended to refer to any individual who performs work for any contractor, vendor or supplier on the project for Andersen and its subcontractors and suppliers at every tier. No contract of employment is created, intended, or implied by use of this safety handbook by any subcontractor, vendor or supplier employee.

This handbook is a guide and is not intended to cover every rule, regulation, safety practice or safety hazard that may be found in construction nor is it intended to address every possible situation that may arise on an Andersen jobsite. The policies stated in this handbook are subject to change at any time at the sole discretion of Andersen, with or without prior notice. This handbook supersedes any prior handbooks or written policies of Andersen that are inconsistent with its provisions. You may receive updated information concerning changes in policy from time to time, and those updates should be kept with your copy of the handbook. If you have any questions about any of the provisions in the handbook, please ask your supervisor, on-site safety representative, or the Corporate Safety Director.

INTRODUCTION

The intent of this handbook is to introduce Andersen's safety expectations to Andersen Employees and all personnel newly assigned to work on any of Andersen jobsites. Andersen strives for an injury-free environment for all personnel on its jobsites. This can truly only be achieved if all parties work together in a cooperative effort.

Andersen Employees, subcontractors, sub-subcontractors and their employees are required to follow Andersen's Safety Rules and all applicable Federal and State OSHA Rules and Regulations, Project or Client Specific Rules, and other regulations and consensus standards applicable to construction such as, but not limited to, NFPA Standards, NEC Standards, ANSI Standards and other industry specific best known practices.

Andersen conducts work within multiple states, some of which have State Occupational Safety and Health Administration (OSHA) regulations. For the ease of reading, any reference to OSHA may be construed as the applicable federal regulations AND the applicable state regulations governing the jurisdiction of the work location. For example, Washington State's Plan is referred to as DOSH, California is Cal-OSHA and Oregon is OR-OSHA. References to OSHA in this document, unless specifically noted otherwise, should be assumed to mean the state the worksite is located within.

A summary of Andersen's Safety Guidelines is contained within this document. We have attempted to identify known areas of our safety program that exceed OSHA rules and regulations. OSHA regulations alone do not address the safety procedures or rules for every condition that can be found in construction. Additionally, due to the length of time that it takes for an OSHA rule to be updated there may be times when ANSI Standards, NIOSH Exposure Limits, Industry Best Practices or other references may be relied upon to set the standard on the project.

EMPLOYEE SAFE WORK RESPONSIBILITIES

All jobsite personnel have a responsibility for workplace safety. In addition to the OSHA mandated employee responsibilities, Andersen expects all jobsite personnel to report identified safety hazards, injuries, near misses or other incidents immediately.

Safety issues cannot be promptly corrected if not reported timely. If you are involved in or witness a jobsite incident such as an accident, an injury, near miss or other safety related event, you will be expected to fully participate in assisting Andersen to determine the facts of the issue. Safety hazards, incidents, accidents or jobsite injuries cannot be fully corrected if the contributing factors are not identified. Additionally, input from the individuals performing the work is vital for future prevention.

Employees Responsibilities: (The following rules and responsibilities can be found in state and federal OSHA regulations. For more information refer to the applicable rule, code or law.)

- All work must be conducted in compliance with applicable safety and health regulations, rules, manufacturer's instructions, or other applicable codes.
- Employees are required by Federal and State Law to report injuries immediately.
- It is the duty of all workers to make full use of safeguards provided for their protection.
- A worker must not operate a machine unless the guard or method of guarding is in good condition, working order and operative.
- A worker must stop a machine or moving parts and properly lock out and/or tag out prior to servicing.
- Workers must not use defective tools or equipment.
- Workers must not remove, deface or destroy any warning, danger sign, or barricade or interfere with any other form of accident prevention device or practice provided.

Subcontractor use of Andersen owned or leased equipment:

- *Subcontractor personnel may NOT operate Andersen owned or leased forklifts, scissorlifts, other aerial lifts, tools or equipment without express written permission and verification of training.*
- *Subcontractor personnel may NOT use Andersen owned personal fall protection equipment except for fall protection anchorages designated for multi-trade use.*
- *Subcontractor personnel may NOT use Andersen owned ladders, except for ladders designated for multi-trade use.*

Pre-Shift Warm Up.

At the start of each shift, all Andersen personnel will participate in a Shift Prep Warm up routine. If you have any injuries or work restrictions that prohibit participation – notify your supervisor. All employees are personally responsible for participating to his/her own capacity. Subcontractors are encouraged to have an appropriately designed worker warm-up program.

ALCOHOL AND DRUG POLICY STATEMENT

Andersen is committed to providing a drug-free and alcohol-free workplace. Consistent with this goal, Andersen prohibits the use, manufacture, possession, distribution or sale of drugs, drug paraphernalia or alcohol at its employment sites. Andersen has adopted a testing program for its employees that is consistent with that goal. Andersen participates in The Construction Industry Drug Free Workplace Program based in Oregon, which forms the basis of our policy, but reserves the right to participate with Labor and Management drug and alcohol testing programs in the respective jurisdictions of its projects.

All subcontractors working on an Andersen worksite must fully cooperate with the goals of a drug and alcohol free worksite and enforce a drug and alcohol testing policy for their own employees which meets or exceeds the Construction Industry Drug Free Workplace program criteria. Following are minimum criteria for an acceptable employer administered alcohol and substance abuse program:

1) Testing of all employees at start of work on project or proof of a valid test within the previous six months' **and**
2) Mandatory post-accident testing for injuries requiring off site medical treatment, accidents resulting in property damage, or involvement in a workplace incident where suspicion of drugs or alcohol may have played a factor; **and**
3) Allowance for testing based on reasonable suspicion; **and**
4) Follow-up testing, disciplinary action up to and including termination, or mandatory enrollment in any recommended treatment programs or education programs, **and**.
5) Testing conducted at a recognized testing laboratory, **and**
6) A panel of screened-for drugs equal to Department of Transportation requirements as a minimum testing panel; ***or***
7) Compliance with a multi–employer program such as the Washington Construction Industry Substance Abuse Program (WCISAP), or Oregon Construction Industry Drug Free Workplace Program.

It is the responsibility of Subcontractor to ensure that their employees and lower-tier subcontractor employees have proof of verified negative drug and alcohol test prior to reporting for work at the job site.

In the event Subcontractor, does not maintain or enforce alcohol and drug abuse policies meeting these criteria, Contractor shall have the right, but not the obligation, to conduct random, pre-employment, post-accident and/or massive drug and alcohol testing of any personnel employed by Subcontractor on the site of the work. All costs thereof, including administrative and laboratory costs and payroll time, shall be borne by and charged to Subcontractor; and any employee testing positive shall be immediately removed from the site and not allowed on any Contractor worksite for a minimum period of one year.

If there is drug or paraphernalia evidence found on an Andersen worksite, Andersen reserves the right to conduct a jobsite-wide drug and alcohol testing of all personnel on said worksite.

Note: Andersen's Drug Free Workplace Program(s**) DO NOT** recognize medical marijuana or legalized recreational use of marijuana as a substance exempt from testing or consideration for positive drug tests. Positive job-related drug and alcohol tests for medical marijuana will result in a positive drug test and be subject to removal and/or the conditions and requirements of their applicable drug and alcohol testing program.

INCIDENT REPORTING PROCEDURES

Andersen Employees and all Andersen Subcontractor Employees working on an Andersen Jobsite shall report all **accidents, injuries,** first aids, **occupational illnesses, or potentially significant near miss incidents immediately following** the incident to their immediate supervisor regardless of the nature.

Subcontractor supervisors and employees are expected to report to the designated Andersen supervisor immediately. If this person cannot be readily identified, or is not available contact the designated contact found in the front of this Handbook.

Most incident reporting can be done by visiting the supervisor in the onsite office, calling the designated supervisor or contacting a designated supervisor via radio (if one is being utilized on the project). If the discovery of an injury occurs after hours and medical care cannot wait until the start of the next regularly scheduled shift, report to the Andersen Safety Contact found on page iv.

Reporting will include the completion of the appropriate documentation and participation in an incident review (if appropriate).

Andersen utilizes a Priority Care Hotline (PC365) which offers the guidance of Registered Nurses to help self-treat your injuries. PC365 has nurses available 24/7/365. You should use this service for instructions related to first aid or if you are unsure if medical care is necessary. This service is available free of charge to anyone working on an Andersen worksite.

24 Hour Nurse Hotline - PC365 – 1-877-217-4734

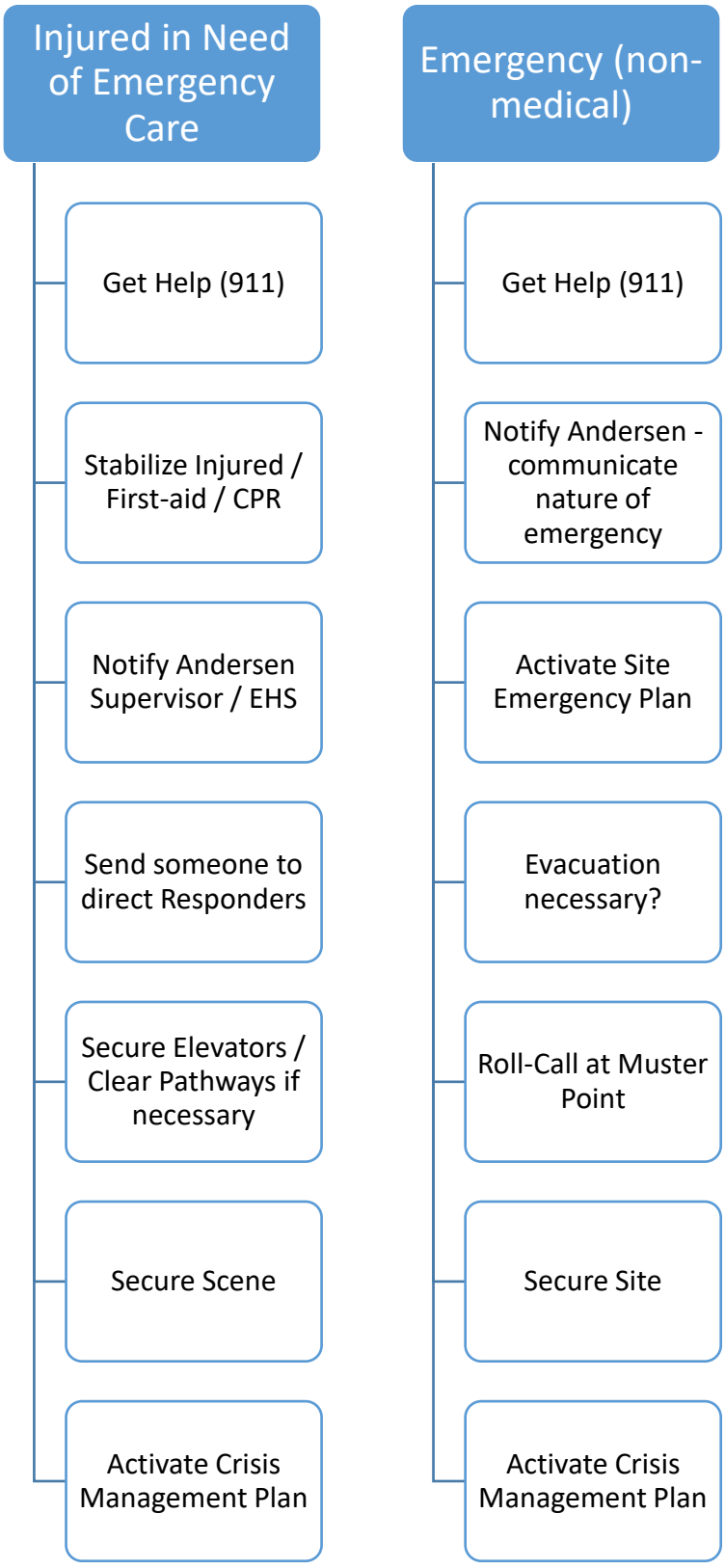
ACCIDENT / INCIDENT REPORTING AND RESPONSE

In the event of an injury or accident, follow these procedures:

1) Determine if anyone is injured and if emergency response must be activated (such as calling 911).
2) If a victim is unable to move without help, stabilize the individual and call for help.
3) Provide first aid treatment if needed and/or transportation to or notification to appropriate professional medical help.
4) Contact 911 for all head trauma injuries, electrical shock injuries, serious neck and back injuries, protruding broken bones, whenever the employee is unable to get up or walk on their own, any loss of consciousness, any other injury or potential personal medical situation such as signs of stroke or heart attack. (See First Aid Policy)
5) Immediately notify an Andersen supervisor, or emergency response team member.
6) Send someone to help direct emergency vehicles to the appropriate area(s).
7) Activate any Site-Specific Emergency Action Plan if determined necessary.
8) Secure the accident area for a thorough investigation. Securing the scene of an accident may entail the following:

a) Securing the area with tape, fencing or other appropriate means;
b) Do not allow any item in the immediate area or involved in the event to be moved unless necessary to provide or ensure medical treatment;
c) Assigning someone to ensure no one enters the area;
d) Photo documentation.

9) Secured areas shall only be released when it has been determined that the event has been properly documented and there is no longer a need to secure for regulatory agencies.
10) **Immediately notify the Project Superintendent** and Andersen's Safety Department. (See page iv for contact numbers). **Failure to report an on the job injury or accident immediately may be grounds for termination or removal from site. Any subcontractor whose supervisor fails to properly report an injury or accident AND secure the scene allowing for an Andersen representative to investigate may be removed from site.**
11) **Subcontractors must cooperate with Andersen's efforts to conduct an effective incident investigation.**
12) Any required regulatory reporting will be made by or coordinated through Andersen's Corporate Safety Department. Subcontractors must coordinate their regulatory reporting with Andersen's Corporate Safety Department since any AI response will involve Andersen and the employee's employer. Federal OSHA and most state plans require notification of fatalities and/or catastrophes within 8 hours. Washington State Labor & Industries requires overnight hospitalizations be reported within 8 hours; Oregon OSHA requires notification within 24 hours. Jurisdictional regulatory reporting will be verified anytime an overnight hospitalization occurs.
13) In the case of a serious injury or illness an employer representative should accompany or follow the injured to the hospital. For a non-life threatening injury, appropriate transportation shall be provided for the injured worker. Injured workers should not drive themselves. A supervisor or designated employer representative should remain with the injured worker at the site of care for the initial medical visit.
14) The foreman, superintendent, and/or site safety representative will complete the Andersen Accident Report Form and any other necessary forms. Each respective employer must also complete an Andersen non-employee accident investigation form. These forms must be emailed to #Incident Report or IncidentReport@andersen-const.com within eight (8) hours.
15) If the injury or accident is serious, work will not continue in the area and tools and/or equipment involved will not be used until the cause has been determined and corrective action has been taken.
16) Any injured Andersen Employee shall complete the employee's portion of the Insurance Form, the Employee's Report of Accident Form, and the Employee Responsibility Form. These forms must be completed immediately following medical treatment or while waiting for medical treatment. The employee should also be put in contact with Andersen's Claims Department immediately following medical treatment.
17) All Employees requiring medical treatment due to an on the job injury (unless the injured worker played no role in the event(s) causing injury), or who are identified as the potential cause of the event shall participate in a mandatory post-accident drug and alcohol test.
18) An incident review shall follow all injury accidents, property damage accidents, or other incidents as deemed necessary. It will be expected that all parties involved in the event be present and participate in the incident review to ensure that proper and accurate chronology of events and root cause can be determined.


Injured in Need of Emergency Care
Get Help (911)
Stabilize Injured / First-aid / CPR
Notify Andersen Supervisor / EHS
Send someone to direct Responders
Secure Elevators / Clear Pathways if necessary
Secure Scene
Activate Crisis Management Plan
Emergency (non-medical)
Get Help (911)
Notify Andersen - communicate nature of emergency
Activate Site Emergency Plan
Evacuation necessary?
Roll-Call at Muster Point
Secure Site
Activate Crisis Management Plan

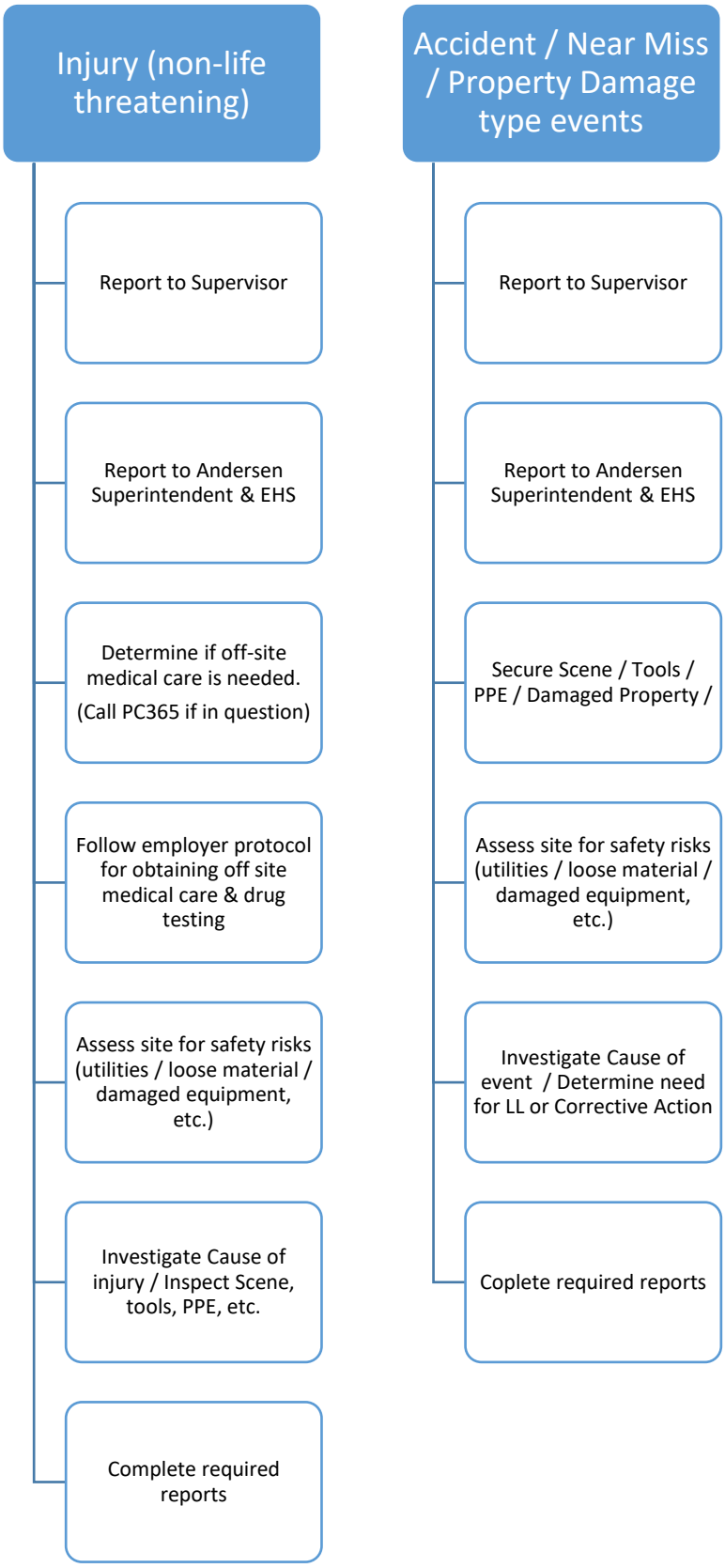
ANDERSEN AND ASI EMPLOYEE RESPONSIBILITIES REGARDING ON-THE-JOB INJURIES, NEAR MISSES OR ACCIDENTS

1) Report all accidents, injuries (including first aids) and potential injuries (such as pain above and beyond what may be considered soreness or discomfort), incidents, chemical spills, fires and near misses, no matter how slight, to your supervisor immediately. Reporting on your next work shift is not an acceptable practice.
2) If you need to see a Doctor, request the state specific Notice of Injury or your Employer's Workers' Compensation Carrier's Notice of Injury from your supervisor for completion.
3) Andersen makes every attempt to provide modified duty to injured workers. Inform your doctor that **modified work is available** to you.
4) Report all initial and subsequent findings and your progress to your Supervisor immediately following any physician's visit or treatment. As used herein, immediately shall mean within 24 hours.
5) Report to your next scheduled shift once the doctor releases you to work (part-time, temporary, modified, or regular).
6) Inform your supervisor of doctor appointments at least 24 hours in advance and return all paperwork from the doctor verifying the appointment if the appointment is during work hours.
7) Fully cooperate with the accident / incident investigation process, the insurance carriers, OSHA and any other investigative processes.
8) Fully cooperate with attending physician's recommendations for recovery.
9) *If you seek medical attention for an on-the-job injury after normal duty hours, you must contact one of the following individuals: your supervisor, the jobsite superintendent, the project manager, the safety representative assigned to your project, the Andersen Safety Director immediately. A drug test is mandatory for all personnel seeking medical attention for work-related injuries.*

Failure to follow Andersen's accident reporting policies may result in termination of, or may adversely affect workers' compensation benefits and/or result in disciplinary action.

Managing Injuries and Illnesses and Prescription Medications

To ensure the safety of all workers and the public, all Employees on an Andersen jobsite must be able to fulfill their essential job functions in a consistent state of alertness and safe manner. If you have sustained an injury or illness (whether work-related or off-duty) or have been prescribed any medications that could cause drowsiness and which impact your ability to perform your normal tasks, you are encouraged to contact your Supervisor or Human Resources Department.


Injury (non-life threatening)
Report to Supervisor
Report to Andersen Superintendent & EHS
Determine if off-site medical care is needed.
(Call PC365 if in question)
Follow employer protocol for obtaining off site medical care & drug testing
Assess site for safety risks (utilities / loose material / damaged equipment, etc.)
Investigate Cause of injury / Inspect Scene, tools, PPE, etc.
Complete required reports
Accident / Near Miss / Property Damage type events
Report to Supervisor
Report to Andersen Superintendent & EHS
Secure Scene / Tools / PPE / Damaged Property /
Assess site for safety risks (utilities / loose material / damaged equipment, etc.)
Investigate Cause of event / Determine need for LL or Corrective Action
Coplete required reports

MEDICAL SERVICES, FIRST AID & CPR

First aid support, supplies, emergency response and planning are an important part of construction safety. The purpose of this policy is to ensure that the employees working on Andersen jobsites have emergency medical services available in accordance with the applicable local, state, or federal regulations.

General Responsibility

It is the responsibility of the Superintendent to ensure that emergency planning is incorporated in jobsite safety. The Jobsite Emergency Plan should be completed at the start of the project and updated as needed. This Plan must be reviewed with personnel during weekly safety meetings on an as needed basis and posted for review.

The address and directions to the worksite must be posted in the jobsite trailer, lunch rooms (when feasible), temporary elevator (when available) and on the large first aid kits. Other feasible locations, such as first aid stands should be identified and used. If workers are badged, provide address on the badge or provide on a hard hat sticker.

Provisions shall be made prior to commencement of the project for prompt medical attention in case of serious injury. This shall include identifying the closest emergency medical centers, occupational treatment centers and ensuring a communications system is available to contact necessary emergency medical responders.

Although first aid training is available for all supervisory employees there will be no employee specifically “designated” as the first aid provider. Should an employee assist another person it shall be a voluntary act as a “Good Samaritan,” hence the Good Samaritan Laws shall cover the rendering of first aid or CPR.

First Aid Supplies

All jobsites shall have readily available first aid supplies and bloodborne pathogens kits. Large jobsites shall have a large first aid box fully stocked in one of the jobsite trailers and a portable first aid kit a reasonable distance away from workers. Andersen’s purchasing agent shall be contacted to obtain any needed first aid kits and supplies.

The jobsite supervisor or on-site designated safety representative shall establish on a weekly basis that there is an adequate supply of first aid supplies available.

Placement of first aid supplies

First aid supplies should be located not only in the jobsite offices and lunch rooms, but should also be readily available on the jobsite. Projects with temporary construction elevators should post first aid supplies, emergency response and notification equipment and perhaps even an AED in the elevator. Smaller first aid kits should be available on the uppermost deck under construction when feasible.

First aid kits in the field should be readily identifiable and in a watertight container. Even a bucket with a lid may be sufficient.

Automated External Defibrillators (AED's)

Oregon State Law requires that any facility of 50,000 square feet or greater where business is conducted and where more than 25 persons congregate to conduct business must have an AED on site.

Projects located in a remote location, where emergency response may be provided by a volunteer fire department or where otherwise emergency response may be otherwise prolonged or delayed are encouraged to have available an AED on site. The location shall be communicated and accessible during working hours.

Emergency Eye Wash Units

Approved, self-contained emergency eye wash units shall be readily available whenever hazardous, toxic or corrosive materials are handled. Self-contained eye units must be within 50 feet of potential hazards and must be replaced or refilled after use per the manufacturer's instructions. Protective measures must be taken to prevent the eye wash fluid from freezing.

Eye wash stations shall be inspected regularly and kept clear and clean in accordance with the manufacturer's instructions.

Transportation of Injured Workers

The job superintendent or other designated safety representative shall determine the need for transportation of an injured worker. Workers should not drive themselves to obtain medical care following an injury. Workers who have suffered electrical shock, severe head trauma, severe cuts, falls or other serious injury shall be transported by ambulance to the closest designated, appropriate medical clinic or hospital.

Emergency medical personnel such as 911 shall always be consulted for the following events.

- Head trauma
- Electrical shock
- Excessive or uncontrolled bleeding
- Loss of consciousness
- Falls
- Fractures
- Cardiac arrest, heart attack or stroke
- Severe burns
- Severe allergic reaction (anaphylaxis)
- Signs and symptoms of Heat Stroke
- Other conditions that warrant emergency treatment

Bloodborne Pathogens – Any blood soaked or other potentially infectious materials shall be handled using universal precautions. For more information see Andersen Bloodborne Pathogens Policy.

Hospital Protocol

Employees working within hospital projects are recommended to have current Hepatitis B Vaccinations. *On occasion, clients may require specific vaccinations due to seasonal influenza or pandemic event that requires personnel screening to comply with specific requirements.*

Infectious Illnesses

Some infectious illnesses, such as pink eye, may impact your ability to work on certain projects. Some clients initiate mandatory reporting procedures to protect immune deficient patients or residents.

Other infectious illnesses, such as MRSA infections, may need to be reported to ensure the worksite undergoes appropriate disinfection. Andersen respects employees' right to privacy but does request that we do not put others at risk unnecessarily.

Training

All first-aid/CPR training will be documented and filed with the Safety Department, located in the corporate offices. When employees receive training through outside vendors (e.g., fire departments) which has not been arranged by Andersen, the Certification of Training issued by the training agent will serve as the documentation of the training. The training documentation will be kept in accordance with Andersen document control policies, or a period of 3 years, whichever is longer.

Guideline for responding to typical construction injuries and other illnesses

The training materials used and supplied to first aid/CPR trainees should be kept readily available by trained personnel as they serve as an excellent guide to responding to medical emergencies.

Responding to Medical Emergencies

Use the **SETUP** program

- **S**top **–** Pause to identify any hazards
- **E**nvironment **–** Consider the hazards associated with your surroundings
- **T**raffic – Be alert to the dangers of traffic
- **U**nknown Hazard **–** Consider hazards that are not readily apparent
- **P**rotect Self and Patient **–** Use barriers; prevent further harm to the patient

24 Hour Nurse Hotline - PC365 – 1-877-217-4734

Andersen utilizes a nurse hotline. This hotline is available to anyone who suffers an injury on any Andersen jobsite.

If the injured worker is not sure if he / she should seek off-site medical care, contact PC365. This is staffed by RNs who can provide over the phone triage, self-care instructions, or the address of the closest medical clinic.

Every jobsite should have a PC365 posting.

To Speak with a Registered Nurse Call:

1-877-217-4734

This is a medical advice nurse service provided by Andersen to any worker injured during the course and scope of work on an Andersen worksite. This service can provide information on when to seek medical treatment for your injury, where the closest qualified provider is located, and how to care for your injury at home.

GENERAL JOB SAFETY PROCEDURES

Compliance with Andersen's Safety Procedures (which follow Federal and State Standards) is mandatory and includes, but is not limited to:

Hazard & Accident Reporting

Report unsafe conditions or acts immediately. Identified unsafe conditions must be reported to Andersen and/or your supervisor upon discovery. If your supervisor does not or cannot correct the identified hazard, notify an Andersen representative. You are not required to work under any unsafe condition.

Any identified hazard of the following nature MUST be corrected or protected immediately.

- Any condition identified as capable of causing serious injury or fatality, such as:
  - Fall exposures in excess of 6 feet; (4 feet in Washington)
  - Struck by hazards
  - Caught in hazards
  - Confined space violations
  - Electrical hazards capable of causing arc flash / blast or electrocution

Site Access and Management, including Required PPE

Access to Andersen worksites is restricted to properly orientated contractor employees and those authorized by the owner and contractor. All visitors must sign in at the jobsite office prior to accessing the construction areas of the jobsite. The signing of a waiver will be required.

All consultants, including safety representatives of subcontractors, must sign in prior to accessing the project. If the visitor is a safety representative or consultant, or other specialty provider such as a crane or mast climbing work platform inspector, said site visitor is required to report out findings to a designated Andersen Supervisor.

Cell Phones & Radios

*Listening to music on AM/FM radios, IPods, mp3 players, walkmen, mobile phone, or any other headphone music device **is prohibited** as this may impact your ability to fulfill your essential job functions in a consistent state of alertness and safe manner and interfere with your ability to hear, recognize, or otherwise know of an emergency.*

The use of personal cell phones for personal business is not advised on the construction site itself. The use of cell phones shall be conducted with the utmost care and users shall not commence their conversation until they have moved themselves to a safe location free from moving work activities.

The use of a cell phone to report hazards may be allowed on a project, provided it can be used safely. The use of a cell phone to photograph or otherwise document an accident, especially if documenting the accident is not a part of your position, can result in said cell phone being subpoenaed as part of the accident investigation.

No individual shall operate a forklift, aerial lift, backhoe, trackhoe, bobcat or other heavy machinery, equipment, or other tool that requires both hands while talking on a cell phone or radio unless it is directly related to the safe operation of the machinery and a hands-free device is being used.

Smoking and tobacco use:

Construction sites are places of employment and therefore smoking is only allowed at the designated smoking areas. This includes e-cigarettes. E-cigarettes are not allowed to be carried on the person, stored in the jobsite offices or lunch rooms, or anywhere inside the perimeter of the jobsite.

Some projects may not allow any smoking or tobacco use on the project property. This includes all healthcare, education projects and LEED certified projects.

Hygiene and Sanitation:

Eat in designated areas only. No consumption of chewing tobacco, sunflower seeds, or food in the interior of the project unless allowed by Andersen supervision.

Workers are encouraged to wash their hands prior to eating, especially if working at a healthcare facility, handling any chemicals, metals or other toxic materials.

Clean, tepid wash water, shall be provided for workers to wash their hands.

An adequate supply of accessible toilets shall be provided for employees per the following table and guidelines:

<table>
<tr><th colspan="2">Washington</th><th colspan="2">Oregon / Idaho / Federal OSHA States</th></tr>
<tr><th># of Employees</th><th># of Required Toilets</th><th># of Employees</th><th># of Required Toilets</th></tr>
<tr><td>1 - 10</td><td>1</td><td>20 or less</td><td>1</td></tr>
<tr><td>11 - 25</td><td>2</td><td>20 or more</td><td>1 toilet seat & 1 urinal per 40</td></tr>
<tr><td>26 - 40</td><td>3</td><td>200 or more</td><td>1 toilet seat & 1 urinal per 50</td></tr>
<tr><td>41 - 60</td><td>4</td><td colspan="2" rowspan="3">Oregon also requires that the minimum # of required toilets on all projects greater than 1 million in value be of the flush type with warm wash water.</td></tr>
<tr><td>61 - 80</td><td>5</td></tr>
<tr><td>Over 80</td><td>1 additional toilet for each additional 20 employees</td></tr>
</table>

Elevator units, or units consisting of a holding tank only are not acceptable, unless they are individually located in a lockable room which affords privacy.

The location of facilities shall be as close as practical to the highest concentration of employees. On multi-story buildings, they shall be provided on every third floor. At all jobsites, they shall be located within 200 feet horizontally of all employees.

An adequate supply of potable (drinking) water shall be provided. Each employer is responsible for ensuring they are providing adequate quantities of drinking water. Adequate quantities may change depending on environmental conditions such as weather, working environment, or PPE requirements.

Daily Safety Planning

All trade workers shall be expected to participate in, understand and follow their work plans as applicable to their tasks. Subcontractors shall review their Site-Specific Safety Plans and Job Hazard Analysis with their trade workers so they may properly execute the Pre-Task Plan.

Pre-Task Plans shall be submitted to Andersen prior to said work commencing. Pre-Task Plans shall be reviewed daily by the trade workers, signed off daily and available in the work location. Completed Pre-Task Plans must be submitted to Andersen at the end of the task or each week.

Pre-Task Plans shall be reviewed in the work location and work shall stop and the plan be updated if the conditions change. Walk the area with the Pre-Trask Plan daily to identify previously unidentified conditions or changing conditions.

Mental distractions, lack of planning and a change in the plan are a leading contributor to incidents.

When a site condition or process arises that differs from the plan or was unexpected, **STOP**. An accident is defined as an unexpected event with potential for unwelcome outcomes. Often during accident investigation, it is discovered that a process was changed on the fly, an anomaly was ignored, or an unexpected condition existed. When this occurs **STOP, RE-EVALUATE, RE-ASSESS, RE-PLAN & RE-EXECUTE**.

Equipment and Vehicles:

- Only company vehicles shall be allowed in the interior of the active construction zone and only with Andersen authorization.
- Personal vehicles shall not be allowed into the active construction zone unless being used for company purposes and only with Andersen permission.
- Parking of private vehicles inside the active construction zone is not allowed, unless expressly permitted by Andersen.
- Operate only equipment you have been trained and authorized to use. Seatbelts or other safety protective equipment must be worn when required or so equipped for use.
- An unimpaired horizontal clearance of not less than 3 feet shall be maintained between the rotating superstructure of any mechanical equipment and any adjacent object or surface. If this clearance cannot be maintained, barricades shall be installed to isolate the hazardous area. Barricades must be a solid object; red danger tape will not suffice as a barricade for pinch points.

Miscellaneous Rules & Guidelines:

- Elevator shafts with elevators that are substantially complete, inspected and permitted by the state licensing authority or under the control of the elevator contractor shall only be accessed by the licensed elevator contractor or state elevator inspector unless accompanied by the elevator contractor or state elevator inspector.

The following acts by any employee or subcontractor personnel can constitute grounds for immediate removal from the Site:

- Arrival at the job site under the influence of, or use of while on-site, alcohol or narcotics.
- Gambling, fighting, inciting riots, offensive or vulgar language, literature or artwork, practical joking and horse play.
- Possession of firearms, ammunition, fixed blade knives not for construction work, or dangerous weapons while on the jobsite.
- Theft of material, equipment or supplies.
- Damaging, mutilating, or willful misuse of equipment, tools or other facilities.
- Unauthorized use of company vehicles or reckless driving.
- Repeated or major violations of Safety Regulations.
- Violation of Andersen's Anti-Harassment or Workplace Violence Prevention policies

Willful violation of safety rules, or safe work practices; repeated or serious violations of safety regulations are grounds for immediate removal from the jobsite.

Repeated safety violations committed by personnel from the same organization can result in removal of the supervisor from the project.

WORK PERMITS

Some work procedures may require a permit prior to proceeding. Some of these work permits will be client and campus specific, while some may be Andersen specific. The following permits may be required:

- Energized Electrical Work Permit - Andersen recognizes NFPA 70(E) as the standard that sets the requirements for Electrical Safety in the Workplace. Specifically, the procedures for establishing an electrically safe work condition and energized electrical work activities. Anytime it has been determined that Energized Electrical work activities must commence, an Energized Electrical Work Permit must be completed by the qualified electrician employed by the designated electrical contractor and signed by a qualified and authorized representative of the Host Employer. An authorized representative from Andersen must also sign said permit, documenting knowledge of the work to commence. The signing of this permit does not indicate representation as a "qualified person."
- Flame / Spark / Flammable Chemical Permit (Hot Work) – This permit is for all burning, welding, soldering, or other spark producing work within a work area where there is potential for something to catch fire. This permit may also apply to the use of highly flammable chemicals or solvents; especially whenever spray applied. This permit will be issued daily by either Andersen's Site Safety Representative or the applicable Andersen Superintendent.
- Permit Confined Space Entry Permit – This permit must be completed prior to the entering of any permit required confined spaces. The permit along with all entry, training, rescue and safety requirements shall be the responsibility of the employer performing entry. The permit must be reviewed with Andersen Supervision prior to entry. Employers will be expected to determine if a confined space is permit required via testing and other applicable evaluations.
- Crane-Suspended Personnel Platform Permit – this permit is required prior to using a crane for lifting personnel in a suspended platform. This permit will be issued when it is determined by Andersen's Site Safety Representative that the use of the platform is the only feasible method of accomplishing the task. The safety checklist included with the permit will be utilized prior to hoisting personnel.
- Utilities Shut Down Permit – These permits are typically issued by facility personnel on occupied facilities.
- Interim Life Safety Measures / Infectious Control Work Permit - Healthcare campuses may require a work permit prior to commencing construction activities to ensure compliance with the ILSM / Infectious Control Measures.
- *Utility Safety Incident & Impact Prevention (USIIP) Permit – An Andersen Permit that must be completed and reviewed with onsite Andersen Supervision prior to drilling, pile driving, excavating and sawcutting within the reasonable tolerance zone of underground utilities.*
- *Excavation and Trenching Permits – Required for any planned excavation which is outside the reasonable tolerance zone of located utilities. Excavations within the reasonable tolerance zone of located utilities requires the USIIP.*
- Concrete Penetration Permits – Any planned impact of concrete slabs, especially post-tension decks, concrete walls, ceilings or columns will require an Andersen Permit prior to the commencement of work.

PERSONAL PROTECTIVE EQUIPMENT

Personal Safety Equipment

Minimum personal protective equipment (PPE) must meet applicable ANSI standards and shall be worn on the jobsite at all times, except in designated PPE Free Zones. Designated Free Zones will be specifically labeled or otherwise identified as such and may include the office and parking areas that do not serve as the laydown yard.
Rock climbing equipment may not be used for fall protection equipment on Andersen jobsites.

Minimum Jobsite Required Personal Protective Equipment

The following PPE is required on all Andersen jobsites:

- Hardhat;
- Gloves
- Safety Glasses (non-safety rated prescription glasses are not adequate eye protection);
- Boots - Leather style, ankle supporting work boots (Safety toe / safety rated boots may be required based on task).

Other PPE may be required based on the jobsite conditions, activities or client rules.

Hard Hats

- Must be in good condition, pass inspection and meet ANSI Z89.1;
- Must be Type I or Type II, Class E or G. Class C hard hats are **not** allowed onsite;
- Should be inspected regularly and replaced when necessary;
- Must not have electrically conductive decorations or devices;
- Must be worn during elevated work, such as when working on a ladder or scaffold, regardless of stage of construction. (Example: even if the project is in the punch phase, hardhats may still be required and will be required if workers are still working on elevated work platforms.)
- Should be replaced if impacted by a fall or fallen object.

With the exception of office environments, long hair must be contained by some means or manner that will not cause danger to an employee from fire or entanglement in moving machinery.

Eye & Face Protection:

- All safety glasses shall be ANSI Z87 compliant and be marked such.
- Safety goggles or safety glasses with full face shields are required when grinding or performing other activities with potential for heavy flying particles that can get around side shields on regular safety glasses. Additional forms of eye protection will be required as prescribed by OSHA standards or the work hazard.
- Work activities that require eye and/or face protection in excess of safety glasses shall be identified in the JHA or PTP.
- Work activities that require face shields, such as the use of chemicals that can splash, use of a cut off or chop saw, or grinder shall still require the use of safety glasses under the face shield. The face shield shall be specific and appropriate to the task.
- Overhead dust creating activities will require a face shield over safety glasses or safety goggles.
- Employees engaged in welding must use filter lenses or plates of not less than No. 10 shades.

- Employees who are assisting welders should not look directly at the welding process and must use approved eye protection.
  Burning goggles with a minimum No. 4 density and plastic cover plate on both sides of the filter lens are required for all gas welding and burning.
- Employees engaged in operations using lasers will use laser safety goggles suitable for the density of the laser beam being used. Such goggles will be marked showing the visible light transmission, the laser wavelength for which such goggles were intended, and their optical density.

Clothing

Appropriate clothing must be worn on the jobsite. Appropriate clothing may be dictated by the type and location of the project and will be dictated by the site rules. For example, clothing when working inside occupied facilities shall be clean, in good condition and not of an offensive nature.

- All clothing worn must comply with general work and safety practices.
- Do not wear clothing that could get caught in machinery or otherwise cause an accident (e.g., sagging pants, baggy shirts, torn or loose long sleeves, torn clothing).
- Shirt sleeves should cover the shoulder and upper arm; shirts will cover the torso.
- Long pants must be worn ***at all times***.
- Pants must be appropriate for the work being performed. For example, Lycra, stretch, sweatpants and/or nylon clothing is not appropriate for construction work.
- Pants should not be too baggy nor have accessories that can become entangled in machinery or cause a trip hazard.
- Loose jewelry or frayed shirts are not to be worn around machinery.
- Employees working on projects with security issues or concerns (e.g., healthcare, occupied data centers, occupied housing, etc.) are encourage to wear clothing and/or PPE that identifies the worker and their employer.

Highly Visible Clothing

High visibility vests or equivalent must be worn on the construction site during use of heavy equipment, when workers are exposed to highway type vehicles on the jobsite or other equipment that may pose a hazard to workers working or walking around the equipment, or when required by the site rules. High visibility clothing also is necessary when working near, with, or under the hook of cranes. *When selecting high visible clothing, the hazards of the work activity must be considered. Each trade must evaluate the potential for sparks or other hazards that may be incompatible with the high visible clothing. Should a hazard of flame exist and the high visible clothing is not appropriate for the hazard, high hazard vests or similar PPE should be removed for the task at hand.*

When workers may be exposed to highway type traffic, a high visibility vest, jacket or shirt must be class 2. Highly visible clothing shall be Bright Orange, Bright Yellow (lime green / yellow) per the applicable ANSI standards and/or MUTCD.

Gloves & Hand Protection:

Gloves shall be provided by each contractor and worn 100% of the time when on the jobsite. Hand protection will be provided by each contractor and should be specific to the task, or as directed by any applicable Safety Data Sheets.

Glove Types:

- Cut resistant gloves appropriate to the task should be selected when handling sharp objects such as sheet metal.
- Nitrile, PVC, or rubber coated gloves are to be used for special types of work (e.g., solvents, chemically treated material). Check SDS and manufacturer for specific type of glove required. Additionally, most glove manufacturers such as Best Glove and Ansell have glove selection guidelines available on their websites.
- Dialectically tested rubber gloves are to be used on all power-line work and where there is possible contact with energized circuits (e.g., concrete breaking, drilling, and excavating). Always inspect before using. Check with your supervisor for proper storage.
- Anti-vibration gloves must be used on all vibrating tools unless the tool is equipped with anti-vibration dampening or the tool handle is wrapped with anti-vibration tape. No one person should be allowed to operate non-dampened vibrating tools such as jackhammers and/or rotohammers for more than two hours without a short break or job rotation.

Hearing Protection

Hearing protection in the form of earmuffs or approved earplugs shall be worn on all high noise level jobs above 85 dB, when required by project rules, when using power tools or when directed. Cotton or tissue paper will not be used as earplugs. **Hearing protection must be on the person available for use at all times.**

Noise levels greater than 115 decibels require ear protection for even short periods of time. Noise levels above 105 decibels may require the use of earplugs and ear muffs. If you must raise your voice to be heard at an arm's length away, hearing protection is required.

Noises and Levels

Decibels	Noise Source	Decibels	Noise Source
65	Conversational Speech	80 – 90	City Traffic; Diesel air compressor
95	Lawn Mower; garbage disposal; Graders	95-102	Circular Saw; snowmobile
95-105	Train @ 50'; front end loaders; crawler tractor	90 – 120	Power shovel cab; earth moving equipment; video arcade; motorcycle; radio headset; rock concert; motorboats
125	Chain saw	130	Jackhammer
155	Auto stereo market	163 - 170	Rifle; handgun

This table demonstrates that there are many personal activities that also should incorporate hearing protection.

Legs, Thighs, Knees, Shins, and Ankles

- Pointed tools must not be carried in pockets.
- A canvas or leather tool sheath hung from the belt is acceptable. All Points Down.
- Shin guards, chaps, spats, etc. are to be considered when using special equipment such as chainsaws or brush hooks and where snake bites are possible.
- Kneepads should be used when a lot of kneeling is required, such as during concrete finishing and patching.

Feet and Toes

Footwear must be sufficient for the task and trade and in compliance with applicable regulatory requirements for the jurisdiction of work site. At a minimum, footwear shall consist of substantial construction, made of leather or similar equally firm material, have a sole that will not create a slipping hazard and provide ankle support.

Activities that require safety toe footwear must be identified on the PTP and said employer will be responsible for ensuring the employees have the appropriate level of foot PPE.

Footwear that has deteriorated to a point where it does not provide the required protection shall not be used. Steel toe footwear with the steel exposed through the boot shall not be allowed.

Sneakers, sandals, and other shoes of this description are not to be worn at any time on the construction site but may be allowed in office trailers.

Rubber boots with safety toe protection should be provided on jobs subject to chemically hazardous conditions. Rubber boots in good condition should be worn when working in concrete. Rubber boots worn for wet conditions should be in good condition, with a good slip resistant sole and preferably some form of ankle support.

Foot guards must be worn when using jack hammers, tampers and similar equipment, unless safety toe boots are worn.

Respiratory Protection

Under normal working conditions on an Andersen jobsite, you should not need a respirator. For special work processes, such as grinding, demolition and some sweeping, respiratory protection may be necessary. Appropriate respiratory protection must be provided by your employer and is to be used for protection against excessive concentrations of dusts, mists, fumes or vapor and gases, or from oxygen deficiency.

Any employee whose job entails a reasonable expectation of having to wear a respirator must maintain a clean-shaven face in the seal area. The appropriate respiratory protective devices must be provided for the hazardous material involved and the extent and nature of the work performed. If you are required to use respiratory protective devices, make sure you have been medically cleared, fit- tested, and instructed in their use.

Make sure that all respiratory protective equipment is inspected regularly and is maintained in good condition. Respiratory equipment must be stored in a dust-proof container between uses.

FALL PROTECTION, FALLING OBJECT PROTECTION, AND FLOOR HOLES

Fall Protection: Falls continue to be a leading cause of injury and fatality in construction. Fall protection must be planned carefully and in advance. Providing proper fall protection may not always be possible on the spur of the moment. An effective Fall Protection Work Plan should include the people, the structure, the equipment, access to the structure, and the work processes. Anytime there is potential for a fallen worker to be suspended, rescue considerations must be part of the plan.

Andersen works in multiple states and the applicable fall protection in construction regulations vary. All work activities with fall exposures shall incorporate the applicable and appropriate fall protection measures to ensure worker safety and regulatory compliance.

In addition to regulatory compliance, Andersen requires fall protection when workers are exposed to fall distances of 6 feet or greater regardless of trade, with limited exception, unless infeasible or when applicable local OSHA regulations are more stringent. Washington State Fall Protection Rules for Construction is one example of local regulations which are in certain circumstances more stringent than Andersen's 6 foot rule.

Safety monitoring systems for fall protection are NOT allowed as a sole means of fall protection unless traditional fall protection is infeasible. Safety monitors for fall protection or falling objects are only allowed to warn others of a hazard in transition or in the process of being corrected and/or protected and those involved in the work activity or correcting the hazard are adequately protected from the fall exposure. Scaffold erection without the use of fall protection is not allowed unless traditional fall protection is infeasible.

Infeasibility must be established prior to work commencing and an acceptable Fall Protection Plan must be implemented. A written plan proving infeasibility and the most protective means of doing the work must be submitted prior. It must be site specific and will be evaluated on a case by case basis. Infeasibility decisions must be approved by the Corporate Safety Director and an Andersen Vice President.

Guardrails:

Guardrail systems shall be provided on established floors as a primary means of fall protection Guardrail systems consist of a toprail, midrail(s) and toeboard(s). It is crucial that guardrail systems be installed such that the top rail is 39 to 45 inches from the walking surface, with a mid-rail halfway between. Toe boards shall be securely fastened with no more than a ¼ inch clearance above the floor level and be at least 4" in height. For cable guardrail systems, follow spacing regulations per the applicable OSHA regulations.

When installing guardrail systems, the stanchions shall be properly planned and installed to ensure the top rail can support the minimum pressure of 200 pounds in any downward or outward direction.

When installing wood or steel guardrails, the rails shall be free of jagged edges, double penny nails that protrude and other rough edges that can catch clothing or cause injury. Overlaps should occur at posts- not mid-span - to ensure proper strength of top and mid rails.

When installing guardrails that must be frequently moved, such as at landing areas, they shall be designed such that they cannot be removed accidentally. Example: End supports shall surround the 2 x 4 such that to remove the top rail, it slides out of place, not lifts upward.

When installing cable guardrail systems with angle iron stanchions, corner posts shall have a supporting knee brace that attaches just below the top rail. Attaching knee braces at the midpoint does not provide enough strength to properly hold the stanchion upright when tightening the cable with a turnbuckle to remove the slack.

Cable top rails must be marked with highly visible material every 6 feet. A highly visible duct tape is recommended to keep it positioned properly as caution or danger tape tied to the cable does not remain in place.

When guardrail systems are used at ladder ways they shall be provided with a gate or be so offset so that a person cannot back off the edge or walk directly into the hole.

Personal Fall Protection:

- ALL WORKERS WEARING PERSONAL FALL PROTECTION MUST BE ADEQUATELY TRAINED PRIOR TO USE.
- ALL SUBCONTRACTORS ARE REQUIRED TO SUBMIT VERIFICATION OF TRAINING.
- Personal fall protection equipment and gear shall meet the applicable ANSI Z359 Standard(s).
- Personal fall protection in the form of a body belt is not allowed. Full body harnesses must be used, even for fall restraint.
- Personal fall arrest systems consist of a suitable anchor point (5000-pound strength or safety factor of 2, designed and used under the supervision of a qualified person), connection device, such as a lanyard, self-retracting lifeline or vertical lifeline, and a full body harness. Body belts are not allowed for fall protection.

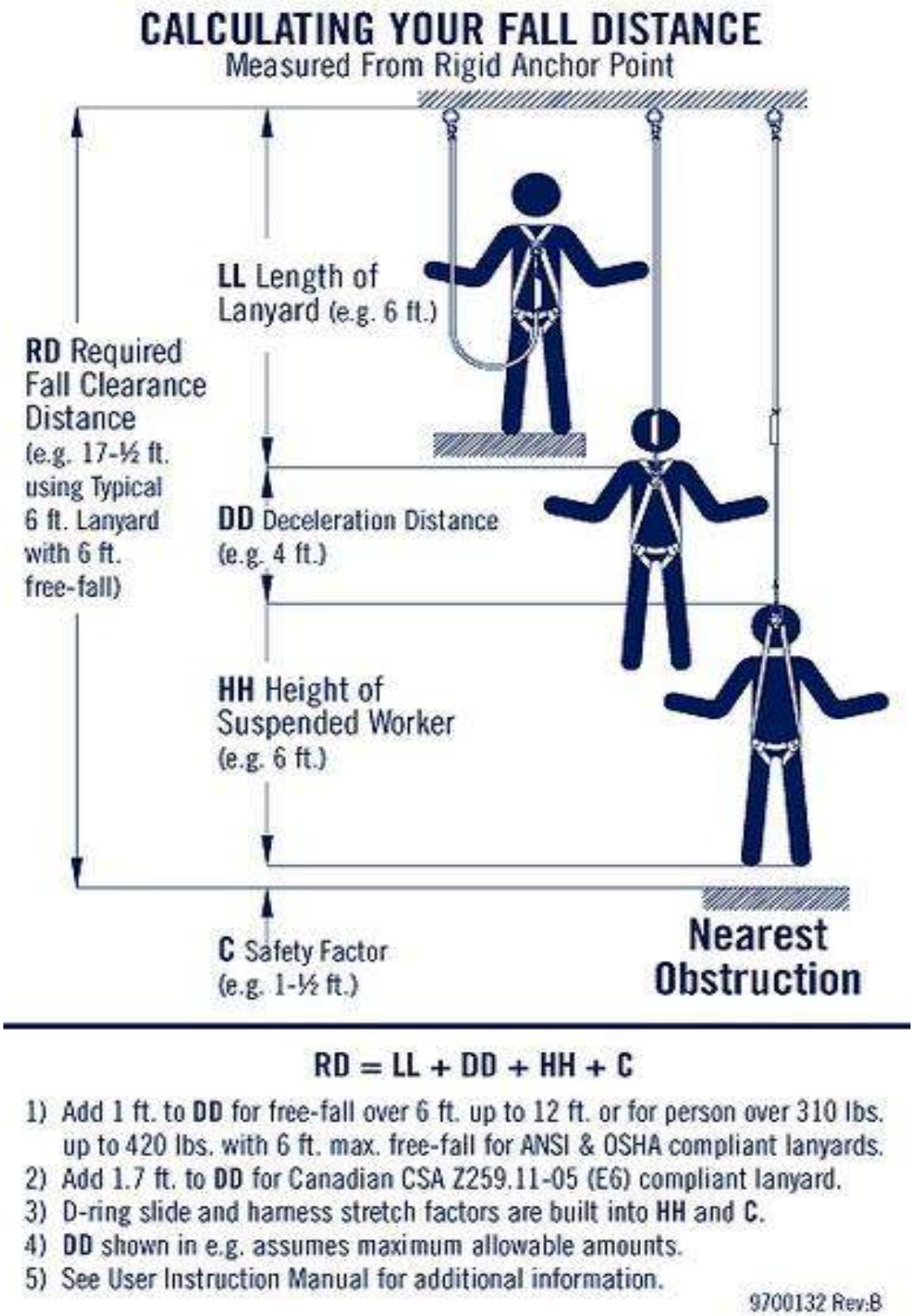
The following should be remembered when using personal fall arrest systems.

- Always inspect every component before each use – EVEN if brand new. Look for improperly set rivets, tears, wear, defective snap hooks, burns, chemical erosion, broken threads, valid labels and impact indicators.
- Manufacturers such as DBI Sala, Guardian and Miller provide excellent online resources for proper inspection.
- If defective equipment is found, tag-it and remove it from service immediately.
- Ensure that your fall protection components are compatible. If unsure, contact your supervisor or the manufacturer.
- Become familiar with the manufacturer use, maintenance, repair and storage instructions.
- Anchorage points for fall arrest must be capable of supporting 5000 pounds or twice the maximum intended load when the anchor point is selected, designed and used under the supervision of a qualified person.
- The anchorage point for fall protection should always be located above the middle of the back. If this not possible, such as during steel erection or roofing work, the maximum fall distance of 6 feet should not be exceeded when feasible.
- When setting up personal fall protection, ensure that the worker cannot impact a lower level. This will require verification of the extension distance created by shock absorbers utilized within the system.
- If the fall distance of 6 feet will be exceeded due to the nature of the work, such as during steel erection, ensure the fall protection equipment in use is rated for a fall greater than 6 feet.
- Anchorage points shall not be flowable materials such as sand or material that can be separated such as a bundle of rebar or pipes that may weigh 5000 pounds or more.

- Personnel working in a full body harness should have a rescue lanyard or trauma strap on the harness to assist in the event of a fall.
- Horizontal lifelines must consist of a manufactured system (such as DBI/Sala, Guardian, Protecta) connected to a properly rated anchorage.
- The use and installation instructions for horizontal lifelines must be provided.

Common Fall Protection Equipment Violations:

- Always verify that the snap hook completely closes around the anchorage connector. Never leave a snap hook gate open when in use.
- Do not tie back lanyards to themselves unless they are designed for that purpose.
- Do not tie knots in fall protection equipment.
- Do not put knots in rope lifelines above the rope grab.
- Do not connect lanyards together to increase working distance.
- Do not connect the unused tail of a twin leg lanyard to an unused side D-ring on your harness.
- Do not use a lanyard with a self-retracting lifeline - only a manufacturer allowed pigtail or shock absorber.
- Do not connect two body connectors (SRL, lanyard, lifeline) to one anchorage unless the anchorage point and connector is designed for two or more persons.
- Do not keep sharp objects such as keys or pocket knives in your pants pockets when wearing fall protection harnesses.



Picture courtesy Capital Safety

Warning Lines

- Warning line systems shall not be used as fall protection on roofs with slopes greater than **2:12** or as otherwise allowed by local OSHA regulations and must consist of ropes, wires or chains with a 500-pound minimum tensile strength and flagged every 6 feet with high-visible material.
- Whenever a perimeter guardrail section must be removed to load materi*als into or out of the building, any workers engaged in the loading / unloading of materials not behind a guardrail must utilize proper personal fall protection equipment and anchorage devices. Additionally, protection must be provided for the surrounding workers not directly* involved with the material movement activities.
- Warning lines shall not be used in place of perimeter guardrail systems unless a guardrail system is not feasible due to the building design, required work activities or conditions.
- The temporary protection will be dictated by the building conditions and design but must meet OSHA requirements for guardrails or warning lines.
- Warning lines shall conform to the applicable OSHA regulations.
- Red danger tape on candle cones is not a warning line system for perimeter edge protection.
- Signage warning workers of the need for fall protection when working outside the warning line must be posted when warning lines are in use.
- Warning lines for roofing activities may be within 6' of a roof edge, provided there are not non-roofing activities simultaneously occurring.
- Warning lines for non-roofing activities must be a minimum of 10' from the fall hazard,

Scaffold Erection, Use and Fall Protection

- Scaffolding with a fall distance of 6 feet or greater must utilize a guardrail system when feasible and if it does not create another or greater hazard.
- Whenever guardrails on scaffolding higher than 6 feet above the lower level is not feasible, personal fall protection shall be provided.
- Mobile scaffolding used near or on a perimeter edge will require the use of personal fall protection equipment unless additional rails are added equal to the height of the mobile scaffold / work platform.

Fall Protection Near Excavations

Fall protection near excavations greater than 6 feet with vertical sides shall be planned and provided, unless it creates greater hazard. Greater hazard shall be determined jointly with Andersen and the excavation subcontractor and an appropriate Work Plan developed. Workers not directly involved in the excavation activities should be kept out of the work zone via the use of a warning system that is visible and clearly communicates hazard and intent. An example would be a warning line, pedestrian control system, water filled jersey barriers, and/or signage.

Employees at the edges of pits, wells, shafts and similar excavations 6 feet or more in depth shall be protected from falling by guardrail systems, fences, barricades or covers, or personal fall arrest system. Employees not directly involved in the work activity should be kept out of the work zone via the use of a warning system that is visible and clearly communicates hazard and intent. An example would be a warning line, pedestrian control system, water filled jersey barriers and signage.

Falling Object Protection:

Falling Object Protection shall be planned into any work that creates such a hazard. This may include perimeter safety netting, falling object netting and the tethering of tools. When possible, controlled access zones should be provided below overhead work and warning signs should be posted.

Anytime construction activities pose a risk of objects falling into an area accessible to the public, overhead and/or falling object protection shall be implemented. Construction site entryways or elevator landings with exposure to overhead work activities shall be provided with overhead protection for the workers.

Anytime work is conducted near an elevated edge, above a guardrail or outside a guardrail, or otherwise above an area where people may be, all tools, hard hats, radios, phones, ladders and other materials that can come loose shall be secured via the use of a tool lanyard or rope. Ropes should incorporate hooks or other such device so that the securement of the object is not dependent upon a knot. Falling object protection shall be incorporated into applicable PTP's.

Check the local jurisdiction for covered walkway requirements when working adjacent to a public sidewalk.

Table 3306.1 excerpted from the International Building Code - Protection of Pedestrians:

Height of Construction	**Distance from Construction to Lot Line**	**Type of Protection Required**
8 feet or less	Less than 5 feet	Construction railings
	5 feet or more	None
More than 8 feet	Less than 5 feet	Barrier and covered walkway
	5 feet or more, but not more than one-fourth the height of construction	Barrier and covered walkway
	5 feet or more, but between one-fourth and one-half the height of construction	Barrier
	5 feet or more, but exceeding one-half the height of construction	None

If at any time you have any questions, contact your supervisor immediately.

Floor Hole and Openings and Wall Openings:

- It is the responsibility of the trade creating floor holes and openings to provide adequate protection in the form of covers or guardrail systems.

Definitions & General Requirements:

- A floor hole is any gap in a working / walking surface greater than 1" through which an object could fall or a worker could trip.
- A floor opening is defined by Washington State DOSH as any opening in the working / walking surface 12" or greater and through which workers could fall.
- A wall opening is any gap in a wall that exceeds 30" vertically, 18" horizontally and through which workers could fall.
- Floor hole and floor opening covers shall be adequately marked, secured from accidental displacement and provide a safety factor of four (4).
- Floor hole & opening covers in Washington State that protrude more than 1" above the walking / working surface must be beveled.

Floor Holes:

- *Floor hole covers 1"-12" in size shall be orange in color*.
- *Floor hole covers shall be adequately supported to prevent accidental displacement.*
- Floor holes created in occupied structures are required to be fire rated equal to that of the floor structure.
- *Floor hole covers large enough for a point load from a scaffold, ladder, sheetrock cart, or aerial lift or similar, shall be capable of supporting 4 times the maximum anticipated load(s).*

Floor & Wall Openings:

- Floor openings shall not be left unguarded or unattended.
- Floor opening covers shall be appropriate marked to indicate hole.
- Floor openings (openings greater than 12" in diameter and through which a person can fall through) shall be protected on all open sides except at entrances to stairways.
- Floor openings shall be guarded by a guardrail system or cover that is rated for 4 times the maximum intended load.
- *Floor opening covers large enough for a scaffold to be set upon or rolled across, ladder to be placed upon, or aerial lift to drive on or over, shall be capable of supporting four (4) times the anticipated load(s) and marked with their maximum allowable load. A review by a qualified person or engineer may be required, such as when the floor opening cover materials do not have strength and/or load rating(s) data.*
- *Floor opening covers shall not be modified or removed without approval from a designated Andersen supervisor.*
- *Floor opening covers not designed for the loads generated by a scaffold, aerial lift, sheetrock cart or other object similar in nature shall have securely attached bumpers a minimum of a 4"x4" or doubled 2"x4" to prevent such equipment from being rolled, moved or pushed onto the floor opening cover. If there is no hazard or potential for such loads, bumpers will not be required.*
- *Floor openings through which materials or persons shall pass shall be guarded with a guardrail system complete with gates or removable guardrails.*
- *Floor openings which serve as ladder passageways shall be set up such that workers physically may not move from one ladder to another while being exposed to an unprotected fall hazard to level(s) below.*
- *Floor opening covers shall have adequate overlap and either be pinned, nailed or otherwise supported from movement from the top of the cover or be adequately supported from the underside to prevent movement.*

- Opening covers in roadways, aisleways or other areas which vehicles may drive shall be rated for a minimum of two times the maximum intended load or rear axle load.
- Persons removing a floor opening cover shall remain at the opening until the cover is replaced and act as a monitor until such time as the cover has been replaced or the opening has effectively been guarded. Monitors serving in this capacity must be protected from any fall exposures.
- Floor holes or openings not suitable for covers that can support four times the maximum intended load shall be guarded on all sides by a standard railing and toe board.
- Wall openings with a distance to the lower level greater than six feet shall be guarded with an adequate guardrail.
- Washington State requires wall openings with a distance to the lower level greater than 4 feet to be guarded. You must follow the more stringent local regulations.
- Wall openings above dangerous or hazardous conditions or equipment must be guarded at any elevation.

Additional General Fall Protection Rules:

- Red danger tape shall not be used to guard open sided floors or edges, with a fall distance greater than 4 feet or whenever aerial lifts are being used on the walking / working surface unless the purpose of the tape is to provide a short term, temporary barrier during a work transitioning period **AND** a safety monitor remains at the location.
- The monitor must remain until the guardrail or warning line system has been replaced.
- The area utilizing danger tape shall not be so large that the monitor cannot see the entire edge from his/her station.
- Warning lines shall consist of ropes, wires, or chains with a minimum tensile breaking strength of 500 pounds.
- Fall protection may be provided by guardrails, scaffolds, warning line systems, fall restraint systems, catch platforms, safety nets and personal fall arrest systems, whichever is appropriate for the condition and complies with the applicable regulations.
- Distance from an unprotected edge can never serve as protection.
- When stilts are used, additional railings must be added that are equal to the height of the stilts being used.
- When platforms or ladders are being used at perimeter edges or above guardrails that protect workers from falls to lower levels, either additional guardrails must be installed or the exposed worker must be protected from falling via personal fall protection.
- The removal of guardrails must not be done without the prior approval of Andersen with the exception when within a properly designated and protected loading / unloading area.
- Removal of guardrails must only be completed after workers directly involved in the activity requiring the removal have been properly protected from the fall exposure and workers not directly involved in the work activity have also been appropriately protected from the fall exposure.

Fall Protection Regulations by State and/or Andersen Rule:

Regulations are subject to change: Employers are responsible for verifying the table below.

Scope	Oregon	Washington	Federal States	California
General & Open Sided floors	6 Feet	4 Feet	6 Feet	6 Feet (ACCO Rule)
Non-walking working surfaces (WA – surfaces not 45” in all directions)	6 Feet	10 Feet (*subject to change – verify current LNI Code)	6 Feet	6 Feet (ACCO rule)
Fall Protection – Steel Erection	6 Feet (ACCO Rule)	6 Feet (ACCO Rule)	6 Feet (ACCO Rule)	6 Feet (ACCO Rule)
Residential Type Construction	6 Feet	10 Feet (*subject to change – verify current LNI Code)	6 Feet	6 Feet (ACCO Rule)
Scaffold Use & Erection	6 Feet (ACCO Rule)	6 Feet (ACCO Rule)	6 Feet (ACCO Rule)	6 Feet (ACCO Rule)
Excavations (vertical)	6 Feet (ACCO Rule)	6 Feet (ACCO Rule)	6 Feet (ACCO Rule)	6 Feet (ACCO rule)
Hazardous Slopes	6 Feet	4 Feet	6 Feet	6 Feet
Wall Openings -	6 Feet	4 Feet	6 Feet	4 Feet
Constructing the Leading Edge	6 Feet	4 Feet* (once 45”)	6 Feet	6 Feet (ACCO Rule)
Roofing work / leading edge	6 Feet	6 Feet (ACCO)	6 Feet	6 Feet (ACCO Rule)
Cranes	6 Feet (ACCO)	6 Feet(ACCO)	6 Feet	6 Feet (ACCO Rule)
Above dangerous equipment / impalement hazards	0 Feet	0 Feet	0 Feet	0 Feet
Well, Pits, Shaft (Excavation Activities)	6 Feet	0 Feet	6 Feet	6 Feet

Scope	Oregon	Washington	Federal States	California
Wells, Pits, Shafts, Trap Doors (Walking / Working Surfaces)	*0 Feet (ACCO Rule)*	0 Feet	*0 Feet (ACCO Rule)*	*0 Feet (ACCO Rule)*
Confined Spaces	0 Feet	0 Feet (retrieval device req'd @ 5')	0 Feet	0 Feet
Floor holes & openings (walk through size)	*0 Feet (ACCO Rule)*	0 Feet	*0 Feet (ACCO Rule)*	*0 Feet (ACCO Rule)*
Form & Rebar Work	6 Feet	4 Feet	6 Feet	6 Feet (ACCO Rule)
Hatchways & Chutes (in Walls w/ <39" sill / wall)	6 Feet	4 Feet	6 Feet	6 Feet (ACCO Rule)
Hatchways & Chutes in walking surface	*0 Feet (ACCO Rule)*	0 Feet	*0 Feet (ACCO Rule)*	*0 Feet (ACCO Rule)*
Skylights	*0 Feet (ACCO Rule)*	0 Feet	*0 Feet (ACCO Rule)*	*0 Feet (ACCO Rule)*
Ladder openings	6 Feet	4 Feet	6 Feet	*6 Feet (ACCO Rule)*
Low & Steep Pitched Roofs	6 Feet	4 Feet	6 Feet	*6 Feet (ACCO Rule)*
Manholes*	0 Feet	*0 Feet (Acco Rule)*	0 Feet	*0 Feet (Acco Rule)*
Ramps, Walkways, runways	6 Feet	4 Feet	6 Feet	6 Feet
Trucks & Equipment	NA*	NA*	NA*	NA*

- While Trucks & Equipment may be exempt from fall protection requirements, this does not mean that unloading of trucks shall be completed without a plan to minimize or eliminate fall exposures.

STRAINS AND SPRAINS AND BACK INJURY PREVENTION

Andersen has implemented a shift prep warm up routine. All Andersen Employees are required to participate unless prohibited to do so by a physician. We highly recommend you conduct appropriate warm up exercises at the start of your work shift and just prior to any strenuous task.

Back strains and other related muscle strains account for more than half of all work-related injuries. Unfortunately, many workers learn the proper method to lift safely or prevent musculo-skeletal injuries (strains and sprains) after an injury.

There are many construction ergonomics tools and resources available today. One valuable resource is Washington State's Caution Zone Job Checklist and Hazard Zone Jobs Checklist. For these checklists and other tools to prevent strains and sprains in construction, go to http://www.lni.wa.gov/Safety/Topics/Ergonomics/.

HOUSEKEEPING AND STAGING GENERAL RULES

General Housekeeping Rules & Guidelines

- Housekeeping is everyone's responsibility and must be done daily. Housekeeping needs to occur on an "your work basis". This means housekeeping should not just be every Friday occurrence but debris and materials should be cleaned, organized and removed from site as the work occurs.
- All construction personnel are responsible for their own, immediate working area.
- Conduit, rebar, metal banding and all-thread shall be picked up regularly and not allowed to hit the ground.
- Each jobsite **and employer** shall have readily available an appropriate spill kit for chemical products in use and equipment with potential to spill chemical fluids. (This includes forklifts, drill-rigs, cranes, generators, compressors, etc.)
- Some equipment, may be required to have a containment system capable of catching 100% of the potential spilled substance plus 10% if exposed to rainwater.
- Work stations that create oil, grease, or grit shall have a catch basin under the machine or operation capable of containing the material to reduce the potential for slips and trips and make clean up easier.
- Protruding reinforcing steel or other sharp objects which workers could fall onto or into must be guarded from impalement. Impalement includes scratches and abrasions. This includes horizontal rebar that protrudes at such an elevation that workers could fall into it (i.e., horizontal rebar that is more than 1 foot above the walking / working elevation).
- *If reinforcing steel protection must be removed to accommodate the work activity (i.e. the rebar cannot be tied to the next or adjacent piece of rebar with the protection still in place), the guarding must not be removed until the activity is taking place in that area. This means that guards on reinforcing steel on an entire run of rebar 20 linear feet (or 10 or 50 – whatever is appropriate) long should not be removed all at once. Reinforcing steel guarding must only be removed as the work activities progress. All individuals on a worksite can help keep reinforcing steel protected.*
- Trash buggies that contain sharp metals should be emptied prior to demolition waste and debris protruding over the top.
- Never block exit pathways with materials or debris.
- Keep stairways and ladder access ways clear of debris, cords and materials.
- Keep tools and working materials in proper containers.
- Do not throw building materials such as concrete formwork accessories on the ground – use containers that can be easily moved.
- Store trash, waste, and scrap in correct containers.
- All food garbage must be properly disposed of or eating will not be allowed in the construction area.
- Do not throw water bottles, caulk tubes or spray cans on the floor or ground – dispose of in a proper container.
- Store materials safely and properly.
- Do not store or dispose of combustible materials or debris in stairwells.
- Smoke in designated areas only, away from flammables and put cigarette stubs in butt cans.
- Do not spit chewing tobacco or sunflower seeds on solid floor surfaces.
- Keep the floor clear of tools, rod ends, metal shavings, conduit and all-thread.
- Clean up tools and work areas as your job progresses. Keep a small trashcan available at your workstation.
- Keep cords and hoses seven feet overhead or lay them flat outside walkways.
- Clean up spills or leaks right away. If a leak appears, find the source.
- Keep visqueen and other material that may blow away from elevated locations secured.

- All trash, waste, and scrap (such as trash, scrap metal, oily rags, broken glass, aerosol cans, and wood) must be placed in properly identified containers. **Recycle** as much as possible.
- Each subcontractor will be responsible to control and remove any materials or debris created by work performed by their employees. If Andersen Employees must clean up the subcontractor's employee's area, the subcontractor will be back charged all costs on a T&M basis.
- Materials shall not be stored within 6 feet of a perimeter edge unless the guardrail system is solidly meshed or the material is contained so that it cannot fall between guardrail posts and rails to lower levels.
- *Keep materials staged on elevated work platforms, such as scaffolds, properly contained such that the materials do not create a trip hazard nor a falling object hazard.*
- Hoses and electrical conductors across aisles or passageways shall be covered or suspended overhead so that there is no tripping hazard when possible.
- All lunchrooms, washrooms and restrooms shall be kept in a clean and sanitary condition. Garbage cans in lunchrooms and restrooms shall be equipped with fitted covers and the contents disposed of daily.
- *Do not store materials on elevated decks or similar structures immediately adjacent to public right of ways unless secured to prevent displacement during loading / unloading.*

SIGNS, SIGNALS AND BARRICADES

Use signs when necessary and remove them promptly when no longer required. Pay attention to signs - they mean what they say. Numerous warning and instruction type signs are available.

Signs are to be placed on barricade stands, posts, or other suitable locations. Before work starts they must be placed where they will be most effective and removed to proper storage when they are no longer needed. Signs must be legible and suitable for their intent.

DO NOT remove a sign or danger tag unless authorized by your supervisor. Observe caution and danger tape when posted. Do not overuse danger tape and/or caution tape. Use when necessary.

RED DANGER TAPE USE:

- Red danger tape shall only be used to warn others of a potentially dangerous area or operation that requires unauthorized personnel to stay out of the work area.
- Red danger tape is for temporary use only. Hazards existing beyond the end of shift shall be protected by more permanent barricading method **whenever feasible.**
- *Signage warning of the type of hazard, the company creating or controlling the hazard, the supervisor name and contact phone number must be posted.*
- *Unauthorized persons shall not cross red danger tape without permission from the authorized supervisor in charge of the activity for which the danger tape was posted.*
- *Red danger tape shall not be used to control access by the general public.*

YELLOW CAUTION TAPE USE:

- Yellow caution tape shall only be used to warn others of a hazard that does not pose serious or significant risk but can be safely navigated by knowledgeable persons. An example would be open floor holes in a slab on grade during plumbing activities.
- Signage warning of the type of the hazard, the company creating or controlling the hazard, the supervisor's name and contact phone number must be posted.

- Yellow caution tape shall not be used to control access by the general public.

PROTECTION OF THE PUBLIC

- *Whenever activities will be conducted outside of a construction site perimeter fence, an appropriately planned level of protection must be provided. This level of protection will differ depending upon the activity and the area of work. For example, pedestrian protection during crane activities shall consist of a solid barrier that prohibits children from walking under the protection, is tall enough that the average person could not easily cross, and requires purposeful movement to infiltrate.*
- Signage appropriate to the activity, environment and task must be posted.
- "Authorized Construction Personnel Only" is the standard suggested signage.
- No Trespassing signage must be placed on every perimeter fence and at each construction gate.
- Spotters may be necessary based on task and environment.
- *Solid barricades or other agreed upon warnings and barriers shall be used when working inside occupied facilities where client staff or customers may have access to our construction zones.* Do not use red danger tape or yellow caution tape for this purpose.
- Hoisting over public right of way or from the public right of way will require at least one trained flagger properly equipped with the OSHA Regulations and the Manual on Uniform Traffic Control Devices (MUTCD), wearing required high visibility clothing, and holding appropriate signage. All flagging activities shall be done in accordance with the MUTCD and other applicable state and local regulations.

For more information on accident prevention signs and tags see ANSI Z535.5-2011.

ACCESS & EGRESS

- *Stair towers, two ladders or double cleated ladders must be used in areas serving more than 25 persons, or in accordance with applicable jurisdictions*.
- Keep walkways clear. Access ways in construction that serve as exit pathways must have at least a 28" wide clearance.
- Access ways for access or egress in occupied buildings must conform with the applicable Life Safety Code for the occupancy.
- Free access shall be maintained at all times to all exits, fire alarm boxes, fire extinguishing equipment, and any other emergency equipment. Free access means clear of all obstructions.
- **Do not stage materials in such a manner as to block access to exits, entrances, stairways or elevators**
- DO NOT store any materials in an active stairway inside an occupied building.
- Whenever workers must pass under a scaffold or other overhead work, safe passage shall be provided by either providing overhead protection such as a canopy or providing protection such that dropped tools or materials from the overhead work cannot free fall.
- Exit paths shall be marked where the exit or way to reach it is not immediately visible.
- Multi-level buildings shall have the floor number visibly marked in the stairwells. The levels that have direct access outside shall be marked with exit signage inside the stairwells.
- A minimum of one stairwell in multi-level structures shall be kept continuously clear.

State Specific Access Regulations:

JURISDICTION	*REGULATION*	*REQUIREMENT*
Federal States & Oregon	*Subpart X – Ladders & Stairways*	*2 or more ladders shall be provided when ladders are the only means of access for 25 or more workers.*
Federal States & Oregon	*Subpart X – Ladders & Stairways*	*At least one point of access shall be kept clear to permit free passage.*
Washington	*Subpart J - Stairways*	*2 or more ladders shall be provided when ladders are the only means of access for 25 or more workers.*
Washington	*Subpart J - Stairways*	*At least one point of access shall be kept clear to permit free passage.*
Washington	*Subpart J - Stairways*	• *Buildings 2 or more stories or 24 feet or more in height require at least one temporary or permanent stairway.*
Washington	*Subpart J - Stairways*	*Structures 3 or more stories or 36 feet or more in height requires two or more stairways.*
Washington	*Subpart J - Stairways*	*Wood frame structures requires the stairway be completed to a second or higher floor before studs are raised for the next higher floor.*
Washington	*Subpart R – Miscellaneous Construction Requirements*	*Personnel Hoists must be provided for access and egress on all multi-story buildings where vertical travel exceeds 60 feet from a ground level access point.*
California	*Article 18 Access & Egress; 1629 Stairways and Ladders*	*In all buildings 2 or more stories or 24' or more in height or depth, permanent or temporary stairways shall be installed.*
	Article 18 Access & Egress; 1629 Stairways and Ladders	*A minimum of 1 stairway shall be provided for buildings and structures to 3 stories or 36 feet; 2 or more stairways shall be provided for buildings and structures more than 3 stories or 36 feet.*
	Article 18 Access & Egress 1630 Elevators for Hoisting Workers	*A construction passenger elevator for hoisting workers shall be installed on or in any building or structure 60 feet or more in height above or 48 feet in depth below ground level.*

LADDERS AND STAIRWAYS

Stairways or ladders must be provided at access passageways where there is a break in elevation greater than 19 inches; 18 inches for frequently traveled passageway and entry or exits on Washington and California State jobsites.

When possible, plan the work such that a more stable work platform can be provided as opposed to working from a ladder.

Ladders:

Ladder Requirements:

- ***All ladders shall be rated for a minimum of 300 pounds.***
- ***Workers combined body and tool weight shall not exceed the rated capacity of the ladder in use.***
- Aluminum ladders are not allowed unless there is absolutely no potential for electrical contact or exposure to heat. This includes the use of extension cords.
- Job-built ladders must meet ANSI A14.4; shall not exceed 24' in working length; shall have a consistent width of 16 to 22 inches; shall have uniformly spaced cleats of 10 to 14 inches and be inspected regularly.

Ladder Set-Up

- Inspect all ladders to make sure they are in safe working order – See below
- Extension ladders used for access must be secured against accidental displacement or movement at the top and bottom.
- Ladders shall always be on a stable base.
- Straight ladders must be set at a climbing angle of four to one.
- Ladders should not be positioned such that workers must climb through a guardrail system to access an upper or lower floor. The landing areas should have an open area with an offset or removable guardrail section that can be easily and safely accessed from the ladder. Safe-t-ladder extensions with a self-closing gate are a great option when possible.
- Fiberglas ladders used as access between floors shall be protected on the backside to prevent damage.
- Whenever 2 or more ladders are used to reach elevated work areas, the ladders must be offset so that a landing or platform is between them.

Ladder Use:

- *Maintain a 3-point contact (two hands and a foot or two feet and a hand) when climbing / descending a ladder.*
- Use a rope to move materials/tools from level to level; do not carry objects in your hands.
- If your work position requires that your shoulders be outside the side rails, you're in an unsafe working position. Move the ladder or obtain other equipment.
- Don't stand above the second step from the top of a step-ladder.
- Don't stand above the fourth rung from the top of an extension ladder.
- Ladders shall not be climbed by more than one person at a time unless designed for such.
- Always face the ladder when ascending or descending a ladder.
- Never jump or hop a stepladder or any other ladder into position.
- Never extend an extension ladder while on the ladder.

- Never use an aluminum ladder within ten feet of live electricity or live electrical lines.
- Gang ladders should not be used to access levels over 24 feet.
- Ladders used for access must extend 36 inches above the top landing and be secured top and bottom from displacement.
- Don't climb a closed stepladder; don't climb on the back of a stepladder; don't stand or sit on a stepladder top or pail shelf.
- Don't alter ladders; Don't drill holes in ladders.
- Step ladders should not be used for access to other work platforms or levels.
- All work from ladders that requires the use of both hands at heights above 6 feet may require the use of a full body harness and lanyard connected to an appropriate anchor point. *This may or may not apply to work done from a step or platform ladder; it will depend upon the activity and location.*
- Any work that requires wearing eye protection, respirators, or other facial protective equipment that impairs vision or handling of pressure equipment should not be performed from a ladder if an alternate work platform that provides a larger work area can be provided.
- Work done from ladders at elevations which requires the use of eye protection, respirators or other facial protective equipment that impairs vision may require the use of fall protection equipment.
- If using a ladder near an open sided edge or above a guardrail on an elevated floor, the use of personal fall protection equipment may be required.
- Clean excess mud from feet prior to climbing a ladder.
- Keep the area below an access ladder clear of materials and debris.
- Ladders shall not be altered in any way including the covering of non-skid feet.
- If working on a ladder in a door opening or the backside of a doorway, block the door, provide signage or some means of ensuring the doorway does not open and topple the ladder and worker.
- Step ladders should not be used perpendicular to the work at hand.

LADDER INSPECTION CRITERIA

Step Ladder	Removal Criteria	Extension Ladder	Removal Criteria
Steps	Loose, Cracked, Bent, Missing	Rungs	Loose, Cracked
Rails	Cracked, Bent, Split or Frayed Rail Shields	Rails	Cracked, Bent, Split or Frayed
Labels	Missing, illegible	Labels	Missing, illegible
Pail Shelf	Loose, Bent, Missing or Broken	Rung Locks	Loose, Bent, Missing or Broken
Top	Cracked, Loose, Missing	Hardware	Missing, Loose or Broken
Spreader	Loose, Bent or Broken	Shoes	Worn, Broken or Missing
General	Rust, Corrosion or Loose	Rope / Pulley	Loose, Bent, Broken
Other	Bracing, Shoes, Rivets	Other	Bracing Rivets
Non-Skid Feet	Missing, Worn, Covered	General	Rust, Corrosion or Loose

Stairways

- Personnel may not use un-poured pan tread stairs unless filled to finish grade by a substitute, safe material.
- Where doors or gates open directly onto stairways, a landing or platform at least 20” wide with the door open shall be provided.
- Where doors open directly onto stairs, such as temporary offices, the stair landing shall be even with the level it serves.
- When using the stairs provided by jobsite trailer rental firms, secure the stairs such that they do not move.
- Stairways having four or more risers or rising more than 30 inches shall be equipped with; at least one handrail; and one stair rail system along each unprotected side or edge not less than 36 inches from the top of the stair.
- Stairways shall be kept free from hazardous projections such as nails.
- Slippery conditions on stairs shall be eliminated before the stairs are used to reach another level.
- Stairways need to be kept clean of material that can pose slipping and tripping hazards.
- Stairways as a main egress route need to have proper lighting at all times.
- Stairways that will not be a permanent part of the structure on which construction work is being performed shall have landings of not less than 30 inches (76 cm) in the direction of travel and extend at least 22 inches (56 cm) in width at every 12 feet (3.7 m) or less of vertical rise.
- Handrails that will not be a permanent part of the structure being built shall have a minimum clearance of 3 inches (8 cm) between the handrail and walls, stairrail systems, and other objects.

SCAFFOLDING AND AERIAL LIFTS

Scaffolding (other than mobile scaffolding to be used in the interior of a structure) must be identified during pre-construction. *The type of scaffolding, its placement, required building ties and the required loading or ground conditions must be identified well in advance of scaffolding arrival and erection*.

All scaffolding must be inspected by a competent person upon site arrival, immediately upon erection prior to first use, at the start of each shift and following any potentially damage-causing event. Inspections must be documented. All scaffolding must be erected, moved, used and dismantled under the supervision of a competent person.

Any swing stage or suspended scaffold, *mast climbing scaffolding* and supported scaffold that will exceed 20 feet in height **or** will be wrapped in plastic requires a Scaffold Plan submitted to Andersen.

- All scaffolding will be erected, dismantled and used in accordance with the applicable local, state, federal or industry recognized standards.
- All personnel performing work on or erecting, dismantling or altering scaffolding must be trained per the applicable standards prior to their work commencing. Subcontractors will be expected to provide proof of such training.
- The designated competent person must inspect all scaffolding daily. Inspections must be documented. Any scaffold system or scaffold member found not to pass inspection must be repaired or replaced prior to allowing workers to access affected scaffold.
- *Work on supported or suspended scaffolding immediately adjacent to an area open to the public, or supported scaffolding with workers on more than one level simultaneously will require a Falling Object Protection Plan which details how materials/tools will be secured to prevent dropped objects.*
- No scaffolding system should be used within 10-feet of overhead electrical lines. Do not change or remove scaffold members unless authorized.
- Scaffolds deemed incomplete must be tagged and removed from service.
- Where people are required to pass under scaffolding, scaffolds shall be provided with a screen between the toeboard and the guardrail extending along the entire opening in addition to a falling object work plan.
- Do not place an object which increases your working height (stepladder, box, etc.) on a scaffold.

Supported Scaffolding General Requirements

- If feasible, all scaffolding above 6 feet in height require full guardrail systems. If guardrail systems or a fully planked deck is not possible, personal fall protection equipment must be utilized.
- *Cross-braces shall not be used as mid-rail or top-rail. Supported scaffolding higher than 6' shall have both top-rail and mid-rail installed when there is not a building within 14" of the scaffold (18" during lath / plaster operations when allowed by code).*
- *All required cross bracing to the interior (working side) shall be in place.*
- *Supported scaffolding wrapped in any membrane to control temperature, protect work from moisture or prevent objects from falling off the non-working side shall be engineered for wind loading and required building tie-ins.*
- *Supported scaffolding shall have toeboards on all non-working (non-building face) sides. Mesh may suffice for falling object projection to the outside when properly installed; however, if scaffold may have persons on multiple levels simultaneously, toeboards may still be required.*
- *Attachable ladders more than 2 frames high will not be allowed for access to standard supported scaffolding. This does not apply to Mast Climbing Work Platforms.*

- All supported scaffolding must be capable of supporting 4 times its maximum intended load.
- No one is allowed to ride on a rolling scaffold when it is being moved except as allowed by manufacturer's instruction and as allowed by OSHA.
- Do not climb on or work from any scaffold handrail, mid rail or brace member.
- Do not climb cross braces or end frames to access scaffold platforms unless end braces are specifically designed for such use. An access ladder or other safe access must be provided.
- All scaffolds must be erected level and plumb on a firm base. Mudsills may be necessary under legs of scaffolding and base plates are required.
- Scaffolds 3 feet wide or less must be secured at the closest horizontal member to the base height to width ratio of 4:1 and be repeated vertically every 20 feet or less thereafter and horizontally every 30 feet to prevent movement.
- Scaffolds greater than 3 feet wide must be secured at the closest horizontal member to the base height to width ratio of 4:1 and be repeated vertically every 26 feet and horizontally every 30 feet to prevent movement.
- Scaffold platforms shall be fully decked or planked such that there is not more than a 1" gap between adjacent units and the uprights, unless it can be demonstrated that a greater gap is required. Under said demonstration, the deck shall be as fully planked as possible to eliminate gaps between uprights and planking.
- Baker type scaffolds require the erector and user to be trained. Baker type scaffolds that will be more than one frame high require the use of outrigger brackets.
- Walkways on gang forms are considered scaffolding. Most gang forms consist of pre-manufactured components. When walkways for gang forms are constructed they must be inspected by the competent person for the activity prior to use. The end sections of gang forms must include a guardrail system. If the ladder access is at the end of the gang form, position the ladder with a walkthrough extension when possible such that workers can access the gang form walkway without the need to climb over or through a guardrail.

Suspended Scaffolding

- Swing stage / suspended scaffolding must be installed per the manufacturer's recommendations. An independent vertical lifeline must be provided for each individual working on a swing stage scaffold. Proper guardrail systems including toe-boards must be provided. A fire extinguisher shall be located on the platform as well as a means for communication in the case of an emergency. This may be visual, verbal, cellular telephone or radio.
- Suspended scaffolding shall be inspected daily and a copy provided to the Andersen Site Safety Office.
- Suspended scaffolding utilizing counterweights that may accessible to unauthorized persons shall include a cable and lock to prevent unauthorized tampering.
- *Suspended scaffolding requires tool tethering and a Falling Object Plan.*
- The scaffold industry association (www.scaffold.org) can be a valuable resource for items such as the suspended scaffold pocket handbook and code of safe practices.

Mast Climbing Scaffolding

- *Mast climbing scaffolding may require a review of the ground conditions by a civil engineer - plan ahead.*
- Mast climbing scaffolding shall only be operated and used by properly trained personnel. Like other scaffolding, mast climbing scaffolding shall be inspected daily and/or prior to each shift by a designated competent person. When mast climbing scaffolding is being used by multiple companies, a competent person from each company should inspect the scaffolding. When mast climbing scaffolding is being used by multiple companies, a use schedule may need to be coordinated with the company responsible for the scaffold.
- When using mast climbing scaffolding on structures with large window openings a front guardrail or personal fall protection will be required.
- Some manufacturers provide a fall restraint anchorage point on the back side of the top platform. Others only have a fall protection anchorage point on the underside of the top platform which poses a problem when raising the deck. This information must be clearly communicated to users and erectors.
- Mast climbing scaffolding that is incorporating side bracket mounted planks to work from must utilize pins that extend at least as tall as the top of the overlapping plank to secure the overlapped planks in place.
- When multiple towers or sections are in use, each section must be identified on the lift and on the inspection report in such a manner to enable cross referencing the inspection report with the unit or tower section.

Mobile Elevating Work Platforms (MEWP's) and Articulating Aerial Lifts

All MEWP's must meet their applicable ANSI Standard. Only authorized, trained personnel shall be allowed to operate MEWP's. The trained operator will be responsible for ensuring that the lift is operating properly. Defective lifts shall be locked out immediately until properly repaired.

- All personnel operating aerial lifts shall be trained and authorized to do so. Manufacturer recommended operating practices including inspection must be complied with.
- Lift controls shall be tested each day prior to use to determine such controls are in safe working condition.
- Employees shall always stand firmly on the floor of the basket, and shall not sit or climb on the guardrail or edge of the basket. Planks, ladders, or other devices should not be used to increase the height of the platform. If the work cannot be accessed using this method, contact your supervisor or site safety representative for alternative safe means of accessing work.
- A full body harness and lanyard shall be used when working from or moving an aerial lift with a basket that extends outside of its base dimension or in accordance with the manufacturer recommendations. Review the lifts' operator's manual for designated fall protection anchor points.
- Boom and basket load limits shall not be exceeded.
- MEWP's /Aerial lifts/ and/or aerial lift baskets shall not be altered without written permission from the manufacturer.
- The manufacturers operating manual must be with the equipment at all times.
- MEWP's and Aerial lifts shall maintain a minimum 10-foot clearance from overhead power lines.
- MEWP's and Aerial lifts must be inspected daily or prior to each use. The inspections should be documented and available for review.

- Prior to each use, a workplace inspection should be conducted. Inspection items must include drop-offs or holes, sloped surfaces, overhead obstructions, inadequate support, wind and weather conditions and other unsafe conditions.
- Different types and sizes of units may have different maximum slopes for travel and operation. If working on a slope, determine the percent slope and review the manufacturer's manual for safe operation conditions.
- Users should ensure the controls for aerial lifts are turned off or the emergency stop button depressed to prevent accidental movement when leaving the lift, working in a stationary location for extended periods or when the work being conducted has potential to result in accidental engagement of the controls.
- Aerial lifts shall be operated on firm level ground, complying with the operator's manual. Cribbing will be of the type and specifications required by the manufacturer, if so specified.
- Some aerial lift operations may require a spotter, depending upon work task and location.
- All lifts must be fully lowered and/or retracted at end of shift and secured for the night, unless approved by the manufacturer.
- Motorized aerial lifts used near a perimeter edge shall be used with extreme caution.
- *Bumpers, not less than a minimum of a 4"x4" or doubled 2"x4" must be securely attached and provided at perimeter edges when MEWPs are in use. Other warnings signs or protective operating methods may need to be utilized to safely move motorized lifts near perimeter edges and floor opening covers. Perimeter edges that are personnel access points, such as stairways, need not have the bumpers provided other means of notifying lift operators of the edge are in place.*

MOBILE EQUIPMENT

- Your employer will provide you with equipment that is safe to use. You will be responsible for inspecting your equipment before each shift. If the equipment becomes defective in any way, notify your supervisor at once and place a "DEFECTIVE - DO NOT USE" tag on it.
- All operators must be trained and authorized prior to using mobile equipment. If you have not received training for the specific type of mobile equipment in question, you are not authorized to operate the equipment.
- Use of other contractors' mobile equipment by Andersen Employees is not allowed without permission. Subcontractors may not operate Andersen owned or leased mobile equipment without providing proof of competency to operate to, and receiving express written permission from, Andersen's site superintendent.
- Know the limitations and specifications of the equipment you use. Do not exceed those limits. Do not use the equipment for other than its intended purpose.
- When working around mobile equipment high visibility clothing will be required.
- When working around mobile equipment such as dump trucks, forklifts, backhoes, rollers, or cranes, do not walk in the operator's blind spots. When you must approach, and walk near or behind the equipment, always get the eye of the operator and ensure clear communication. A good practice is to ask the operator to raise his/her hands until all workers on foot are safely away from the equipment.
- While mobile equipment should give pedestrians the right of way, pedestrians are smaller and move quicker. Be safe – keep your distance from mobile equipment in operation.
- An unimpaired horizontal clearance of not less than 3 feet shall be maintained between the rotating superstructure of any mechanical equipment and any adjacent object or surface. If this clearance cannot be maintained, barricades shall be installed to isolate the hazardous area. Barricades must be a solid object; red danger tape will not suffice as a barricade for pinchpoints.

Forklifts

Subcontractors may not operate Andersen owned or leased forklifts without providing proof of competency to operate to, and receiving express written permission from, Andersen's site superintendent.

1) All personnel operating forklifts shall be properly trained and evaluated in accordance with applicable state regulations.
2) Designated and trained forklift operators must complete a pre-operation check and inspection daily.
3) The designated operator shall be responsible for ensuring that the inspection is being performed and documented.
4) Defects found shall be communicated immediately to the site supervisor and, if determined of such a nature as to affect the safe operation of the forklift, the forklift will immediately be locked out until properly repaired.
5) Forklift maintenance and repairs shall only be completed by an authorized person. Some repairs may not be allowed to be completed onsite. Check with the site supervisor.
6) Only approved platforms may be used with a forklift.
7) Use of personnel platforms on a forklift require manufacturer approval and notification/approval of the Andersen site supervisor. Whenever a lift truck is used for lifting personnel without controls at the platform, the following precautions shall be taken:
   a) A work platform must be equipped with standard guardrails and be firmly secured to the forklift carriage or forks.

b) The hydraulic system shall be so designed that the lift mechanism will not drop faster than 135 feet per minute in the event of a failure in any part of the system.
c) If occupants on the platform can contact the lift chains or other dangerous pinch or shear points on the mast or carriage, the platform must have a screen or guard that prevents contact.
d) Employees must utilize adequate fall protection while working on the platform.
e) The operator must remain in the unit when employees are working on a platform.
f) The operator shall be in normal operating position while raising or lowering the platform.
g) The vehicle shall not travel from point to point with the platform elevated at a height greater than 4 feet while occupied. Inching may be allowed when necessary at elevations greater than 4 feet.

8) Forklifts shall not be left unattended when loaded.
9) Forklifts shall be secured from unauthorized movement after shift.
10) Forklift parking brake must be engaged and boom lowered to the ground before leaving the cab.
11) Forklifts in use on Andersen jobsites must be equipped with a slow-moving vehicle sign, an operating beacon and rear view mirrors in good condition.
12) Some projects and work locations will require the use of a spotter for some or all movement of the forklift. Check with the site supervisor.

Free rigging is the direct attachment to or placement of rigging equipment (slings, shackles, rings, etc.) onto the tines of a powered industrial truck for a below-the-tines lift. Modifications and additions which affect the capacity and safe operation shall not be performed by the customer or user without manufacturer's prior written approval. This type of lift does not use an approved lifting attachment and could affect the capacity and safe operation of the forklift. Therefore, free rigging is not allowed without written approval from the manufacturer. The use of an approved lifting attachment with a locking hook and safe working load capacity plate is the preferred alternative.

All near miss incidents or accidents involving **forklifts must be reported immediately**. If the operator fails to report such an incident, they may be removed from authorized operation.

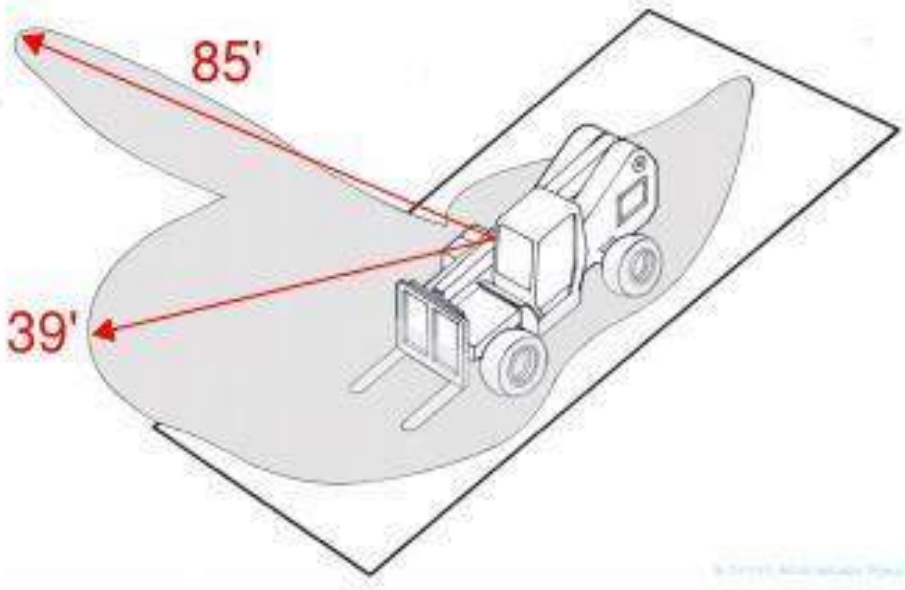
Andersen employees operating forklifts in the public right of way will be subject to Andersen's Fleet Policy and will be required to have a valid driver's license. *Subcontractors operating forklifts in the public right of way are encouraged to ensure the operators have valid driver's licenses*

Preventing Backovers

Spotters to prevent backovers of workers by equipment such as forklifts, dump trucks, skidsteers, etc are often times necessary dependent upon the work site location and conditions. Spotters need to be someone others will listen to, can focus on the task at hand and possess a basic understanding of what is required to keep themselves safe. Implementation of the following actions can help keep spotters safe.

- Ensure spotters and drivers agree on hand signals to be used
- Instruct spotters to always maintain visual contact with the driver while the vehicle is backing
- Instruct drivers to stop backing immediately if they lose site of the spotter
- Do Not give spotters additional duties while they are acting as spotters
- Instruct spotters not to use personal mobile phones, personal headphones or other items that could pose a distraction during spotting activities
- Provide spotters with high-visibility clothing
- Communicate with both the spotter and the vehicle driver the blind spots if known

A rough terrain forklift "kill zone" is identified by the gray area. This represents the area around which an operator's view of workers on the ground may be fully or partially obstructed. For more types of equipment go to www.cdc.gov/niosh



Motor Vehicles and Power Equipment

Vehicles and mobile equipment are to be operated by authorized personnel only.

1) Always wear your seatbelt.
2) Personnel ARE NOT allowed to ride in the back of pickup trucks or other areas of a vehicle not designed to carry personnel.
3) Obey any posted speed limit and other regulatory signs. Give pedestrians the right of way.
4) Look to the rear and sound your horn before backing.
5) Shut off the motor to refuel.
6) Shut off the motor and set the brakes before leaving the vehicle.
7) Inspect the vehicle each day before use.
8) Mount or dismount only when the vehicle is stopped.
9) Keep arms, feet, and bodies inside. All personnel must be seated.
10) A flagger or spotter should direct the backing of a vehicle in congested areas.
11) No persons may ride in a vehicle that is not designed for passengers.
12) No more persons may ride in a passenger vehicle than there are seats and seatbelts available for use.
13) Truck drivers shall be allowed to unstrap their loads, designate what materials are for delivery, and then are expected to either:
    a) Remain in a designated safe zone during loading and unloading operations conducted by overhead cranes; or
    b) Return to and remain in the cab of their truck during forklift loading and unloading operations.
14) Truck drivers and delivery personnel shall not be allowed inside the construction zone without proper PPE and authorization from Andersen.

Fleet Safety

Only authorized persons may operate Andersen vehicles. Authorization may be obtained through Andersen's Regional Operations Managers. All persons operating company vehicles are expected to observe the rules of the road. This especially includes speed limits, use of seatbelts, and properly securing of materials in the bed or on racks of pickup trucks.

Personnel operating motor vehicles will obey the hands free mobile phone laws and will not operate a motor vehicle while using a mobile phone without a hands-free device. Texting while operating a motor vehicle is prohibited.

No persons shall be allowed to ride in the bed of a company vehicle, including subcontractors' vehicles used on the jobsites*. Riders must occupy a seated position, equipped with a seat belt for each occupant. Vehicle occupancy limits will be observed.*

Report all motor vehicle accidents immediately. If a motor vehicle accident occurs on the public roadways attempt to get a picture of the other vehicle(s) and your company vehicle prior to moving both vehicles if possible and safe. Follow the state's rules for reporting motor vehicle accidents.

MATERIAL HANDLING AND MATERIAL HANDLING EQUIPMENT

- All material handling machines must have backup alarms, horns, rollover protection structures and seat belt (when provided by manufacturer and when equipped with a ROPS).
- If provided with a seat belt, the seat belt must be worn.
- All cab glass shall be safety glass and in good condition.
- Signs shall be conspicuously posted on all sides of any mechanical equipment warning workers, “DANGER - STAY CLEAR”.
- Items of personal property, tools, or other miscellaneous materials shall not be stored on or near any mechanical equipment if retrieval of such items would expose a worker to the hazardous pinchpoint.
- Items of personal property, tools or other materials shall not be taken into the cab of material handling equipment if such item could potentially interfere with the safe operation of the equipment.
- Loads in material handling equipment, such as gravel and soils in trackhoe buckets, should not be raised or moved over workers.
- Quick Couplers for hydraulic excavators must be used in accordance with the manufacturer’s directions.
- Quick couplers for hydraulic excavators should be inspected to determine if the manufacturer has provided and/or requires the installation of a locking pin when changing buckets or other attachments.
- Follow manufacturer’s installation procedures and recommendations for testing quick coupler devices and attachment connections whenever an attachment is made.
- Employers using and working with equipment utilizing quick coupler devices must be properly trained in the proper use of the quick couplers, making visual inspections, procedures for engaging attachments and methods for testing connections.
- Operators of hydraulic excavators must ensure the bucket or attachment using a quick coupling device is properly secured prior to putting it to use.
- Operators of conveyor equipped trucks shall not stand over the conveyor, nor shall they get in the bed of a conveyor truck without properly securing the conveyor to prevent accidental movement.
- When lifting with an excavator or backhoe, attach loads only to those points provided and approved by the manufacturer.
- Hydraulic excavators should not be used for tasks better suited for a crane. Discuss lifting plans with the Andersen Superintendent and Safety Department.
- Buckets should be removed when lifting loads with excavators.
- It is prohibited to use an excavator to lift people.
- When attaching lifting slings to the hooking device or lifting point care should be taken to ensure that the slings and their attachments are able to hang free at all times and do not make contact with the stick, linkage or coupler(s).

CRANES AND RIGGING

Cranes

The intent of Crane & Rigging Safety Procedures is to insure all crane operations are performed in a safe manner. Documentation must be supplied with the crane and reviewed by the project superintendent prior to any work by the crane on the job. All crane operations must be done in compliance with the applicable OSHA, Federal and State regulations. The following outlines Andersen's minimum expectations and should be used to assist with crane planning when a crane will be operated on site.

Prior to contracting with a crane service / crane provider, subcontractor shall host a preconstruction meeting with Andersen and present their Crane Plan which shall identify the crane provider, crane type and age, location of use and set-up, competent or qualified persons (including lift director), assembly / disassembly director, crane operator, and rigging personnel. Persons hiring cranes must communicate in advance the required compaction for subgrade soil conditions/elevations/work sequencing.

Subcontractors contracting their own crane service are responsible to provide their own competent, or qualified persons for all crane operations, including a lift director.

Subcontractors contracting their own crane service are responsible to provide their own riggers, signalman and rigging for lifting and distribution of materials and equipment.

Andersen reserves the right to require subcontractors train / re-train riggers and signalpersons utilizing a class or instructor meeting Andersen's approval at the subcontractor's expense.

- All on-site crane operations require verification of the following: crane operator's training and authorization to operate the applicable crane; the crane's most recent annual inspection report with proof of correction of any noted deficiencies; a mobile crane set up plan (if mobile crane); and a critical Lift Plan (if applicable). Verification of daily inspections shall be provided upon request. For crane operations in Washington and California States, see applicable regulations.

Andersen-Construction reserves the right to require recognized third party certifications for all crane operators.

Crane Operations:

1) Survey the site for the required ground set up requirements that could be impacted by crane operations (e.g., overhead power lines, public access ways, bus lines, etc.). Address any potential impacts in the site's Crane Plan.
2) All crane operators must be licensed per the applicable federal, state or local regulations for each make and model crane operated.
3) Crane operators will only operate cranes of the type and size and in the configuration certified on their 3rd party license. Operation outside the 3rd party certification is prohibited.
4) Third party certifiers for crane operators must be those with an accredited crane operator testing program accredited by a nationally recognized accrediting agency. Operator certification must include a successful passing of a written and practical examination.
5) Cranes to be operated on site must be properly licensed / certified / inspected in accordance with applicable federal, state or local regulations.

6) All OSHA, Federal, State or local jurisdiction required licenses, certifications, permits and/or inspections must be completed prior to operation on the project.

7) A Lift Plan must be submitted for all mobile crane operations, special lifts, critical lifts, multiple crane lifts, and blind lifts.

8) When multiple cranes are operating on one site or within radius of each other, a project specific Crane Plan shall be completed and all involved parties shall meet to review the Plan prior to erection, assembly and / or operation, monthly and following any near hit or incident.

9) Communications must be part of each Crane Plan. When communications will be via radio, hands free communication is strongly encouraged. Tower crane communications or any crane operation that takes both hands to safely operate must utilize hands free radio communications.

10) The operator must inspect his/her assigned machine before each work shift or in compliance with the manufacturer's inspection requirements and complete the inspection report in accordance with the manufacturers' operating manual.

11) All inspection reports for must be in the cab of the crane and a copy submitted to Andersen.

12) The operator is solely responsible for the safe operation of his/her assigned machine.

13) The operator has full responsibility for the safety of a lift and may not make a lift until safety is assured.

14) A copy of the Manufacturer's Operator's Manual must be in the crane's cab and this manual must be reviewed by the crane operator and understood by him/her.

15) A copy of the load chart must be in the crane cab and visible to the operator.

16) Accessible areas within the swing radius of the rotating superstructure counterweight of a crane shall be barricaded to prevent employees from being struck or crushed by the counterweight.

17) Tools, lunch boxes or other items shall not be stored under the rotating superstructure or near any mechanical equipment if retrieval of such items would expose a worker to a hazardous pinchpoint.

18) The crane operator shall take great care to not swing loads over other persons and shall notify others when an overhead load is incoming. Individuals shall NOT position themselves under a load unless required for the work task.

19) Crane outriggers (for mobile cranes) must be leveled and fully extended when making a lift unless the Crane Plan and operator's manual allows it to safely operate without the outriggers.

20) No part of the crane, load, hoist (load and boom) lines, boom and tag line shall come within 20 feet of energized overhead electrical lines up to 350KV and within 50 feet of lines over 350KV without the required safety regulations being fully implemented first.

21) For pick and carry operations, consult the manufacturer's operator's manual and operating notes.

22) No computer systems or limit switches are to be in a non-functioning or override condition.

23) Use tag lines to control the load unless they create a greater hazard.

24) Use of a properly trained and qualified signal-person is required in the following situations:

   a) When the point of operation (meaning the load travel or the area near or at load placement) is not in full view of the operator; *or*

   b) When the equipment is traveling and the view in the direction of travel is obstructed; *or*

   c) When due to site specific safety concerns, either the operator or the person handling the load determines that it is necessary or when it is required by local regulations.

25) An accessible fire extinguisher of 5BC rating or higher shall be available at all operator stations or cabs.

26) The use of personnel platforms is prohibited unless the erection, use, and dismantling of conventional means to reach the worksite (such as personnel hoist, ladder, stairway, aerial lift or other elevating work platform) is more hazardous or is not possible because of structural design or worksite conditions.

27) Crane-suspended personnel platforms require completion of a Lift Specific Plan; along with any necessary training, inspections and coordination, prior to use.

28) The crane operator shall immediately shut down the crane if any part of the crane, rigging or load strikes any object. The crane will be re-inspected by a qualified person and, if damage is detected, all repairs shall be completed under the guidelines of the manufacturer. The crane must then be re-inspected by a third-party agency prior to re-initiating operations.

General, Critical and Special Lift Plans

Most crane operations will only require a General Lift Plan. A General Lift Plan must be provided for each non-repetitive lift that is not categorized as "Critical", or "Special". Crane operations that require Special Lift Plans or Critical Lift Plans should have a pre-lift meeting well enough in advance to ensure proper planning.

A "Special" Lift Plan is required for the following crane operations:

- A load that is critical to the schedule
- A load that has a long lead time
- When significant chemical release is possible
- When serious risk to personnel exists
    - Serious risk to personnel include construction personnel, the public, and the host employer's employees.

A "Critical" Lift Plan is required for the following crane operations:

- Tower Crane Erection, Climbing and Dismantling
- Any lift that exceeds 75% of a mobile crane’s capacity
- Any lift that is over an occupied facility
- When more than one crane is used for the lift
- When personnel are hoisted. * see item #26.

Special Lift Plans with potential chemical risk or risk to the public and Critical Lift Plans with crane capacities exceeding 85% must be forwarded to an Andersen Safety Representative and General Superintendent or other designated corporate level supervisor.

- **Any mobile crane lift that exceeds 90% crane capacity may require an Engineered Lift Plan. This must be reviewed during pre-construction and preferably during pre-bid.**

When utilizing tower cranes, the Crane Plan should identify the crane lifts that may require a Lift Plan and be clearly communicated to the crane operator and signalperson in advance.

Rigging & Miscellaneous Tools and Equipment

Only persons qualified to rig loads shall be allowed to do so. Different loads may require different qualification levels. Rigging equipment shall be inspected prior to each use and/or at the start of each shift.

- Material handling devices such as chain falls, hoists and winches shall be used as designed and per the manufacturer's instructions.
- Rigging personnel must know the capacities of rigging equipment and weights of loads.
- Do not use rigging for fall protection and do not use fall protection equipment for rigging.
- Tag lines shall be used for controlling loads unless the tag line poses greater risk.
- *Never wrap taglines around any part of the body as a way of stopping load's swinging.*
- *Ensure taglines are free of all people and objects before giving the signal for high speeds.*
- *Never turn your back on tag lines.*
- Routes of suspended loads shall be preplanned to ensure no workers or the public are directly below suspended loads.

Hooks, Shackles, Beam Clamps, and Chokers

- All hooks must have a safety latch (see steel erection rule for exceptions).
- Always place a load in the center of a hook and never on the point.
- Get approval from your supervisor before rigging from any structural member to ensure that it will support the load being raised.
- Never use plate grips, tongs, pipe clamps, etc. as substitutes for beam clamps.
- Hooks, shackles, and beam clamps shall be inspected before use. Do not exceed the capacity marked on the equipment.

Chain Falls and Hoists

- A chain hoist must be used within its rated capacity.
- Make sure that the capacity is marked on the equipment.
- Chain hoists are designed so that one person can operate the hand chain to lift the maximum load for the chain hoist.
- Do not leave an unsecured and unattended load hanging on a hoist or chain fall.
- Do not stand or have any part of the body below a load suspended on a chain hoist.
- Do not wrap the load chain around the load to be lifted.
- Every chain hoist should be inspected before the making a lift. Your visual check should include the hooks for any irregularities, the chain for wear or damage, and the housing and sheave for any signs of damage from abusive treatment.
- Use softeners, where possible, to obtain a "bite" on material being rigged.

Rope

- Wire: Inspect for frays, kinks, broken wires, and worn spots before using.
- Fiber: Inspect for excessive broken fibers, wear, and deteriorated inner and outer strands before using.

Wire Rope & Cable Clamps

- Eyes in wire rope slings shall not be formed by wire rope clips.
- When U-bolt wire rope clips are used to form eyes such as the termination point on cable guardrail, the "U" section shall be in contact with the dead end of the rope.
- Most manufacturers do not recommend the use of "U" bolt clips for critical applications, including Horizontal Life Lines. Check with the manufacturer of the bolt and clear with the manufacturer or engineer that designed the system.

- Use the appropriate number of clips for the size cable, but never less than 2.

Rigging hardware must meet their applicable ANSI and/or ASME standards for manufacturing, marking and testing. Failure to be able to provide such documentation will result in removal of non-compliant products. See ANSI / ASME B30.26 and ASME B30.20-2010

In today's age of technology and smart phones, rigging App's are now available.

Each rigger should have readily available a field reference guide of some type, a rigging gear inspection reference card, a journeyman's rigging quick reference card and other applicable references.

Some suggested references include:

- Industrial Training International; "In a Flash" Field Reference Guide
- ITI: Rigging Gear Inspection Reference Card
- A Handbook for Riggers, or Bob's Rigging & Crane Handbook
- Journeyman Rigger's Reference Card
- Master Rigger's Reference Card

REMOVAL CRITERIA FOR RIGGING HARDWARE*

WIRE ROPE & WIRE ROPE SLINGS	**WEB SLINGS & ROUNDSLINGS**
Kinks, crushing, unstranding	Heat damage or melting
Birdcaging	Chemical damage
Distorted rope structure	Ultraviolet ray damage or severe abrasion to web
Broken wires (check stds.)	Worn or broken stitching
Damaged end fittings	Distortion of fittings
Corrosion or heat damage	Holes, cuts, tears or snags
Severe wear of outside wires	Crushing, sling body knots
Missing or illegible sling labels	Cut cover of round sling which exposes core yarns
Core damage	Missing or illegible labels
	Sling impacted with foreign material
	Round sling with broken or crushed core yarns
RIGGING HARDWARE & BELOW THE HOOK LIFTING DEVICES	**ALLOY STEEL CHAIN SLINGS**
Missing or illegible labels	Heat damage, heat > 1000 degrees F
Structural deformation	Bent, twisted or cracked links
Cracks or broken welds	Broken welds or components
Severe metal loss	Bent, twisted or cracked master links or couplers
Hole distortion	Severe corrosion or pitting
Cracked or worn pulleys, sheaves, sprockets, bearings, chains, belts or linkages	Elongation of links / components
Damaged threads	Non-working latches
Heat damage	Hook spread or twist
Severe corrosion or pitting	Broken lengths repaired by low carbon coupling links
Component hinge ability	Makeshift links or fasteners
Substandard components or homemade repairs	Non-hinging components
	Missing or illegible labels
** Excerpted from standards and Industrial Training International's (ITI) "In a Flash" Field Reference Guide*	

TRENCHING, EXCAVATIONS, DRILLING, SAWCUTTING and LOCATES

Excavation" means any operation in which earth, rock or other material on or below the ground is moved or otherwise displaced by any means.

General Safety Guidelines / Trenching & Excavations:

1) Any contractor performing excavation work must have a designated competent person and submit an Excavation Work Plan to the onsite Superintendent.
2) The Excavation Work Plan must address the items contained in Andersen's Excavation and Trenching Checklist.
   a) The Excavation Work Plan must address underground utilities and when the locate will be conducted. Locates must be conducted no more than 10 days, and no less than 2 days, prior to excavating.
   b) For utility locates within the public right of way, one call – 811 will connect you to the closest one call center.
   c) The Contractor conducting underground or excavation activities shall be responsible for calling for locates.
3) The locate # and/or ticket(s) shall be documented and kept on site.
4) Locates shall be maintained for the lesser of 45 days or the duration of the project. A facility operator's markings of underground utilities expire 45 calendar days from the date notice was provided to the one call center.
5) Boundaries of excavations must be marked with white paint unless infeasible.
6) Prior to penetrating soil or concrete with tools, stakes, sign posts, check the jobsite locates, utility locates, site plans and drawings or with your supervisor.
7) Plan the excavation to avoid damage to or minimize interference with underground facilities in and near the excavation area.
8) Provide support for underground utilities in and near the construction area when needed**.**
9) Excavators and sawcutters are to use reasonable care to avoid damaging underground utilities.
10) *Spoil piles must be a minimum of two feet from the edge of the excavation and should not exceed 4 feet in height unless tabulated data for shoring or other engineering documentation requires spoil pile height be less than 4 feet or spoil pile setback be more than 2 feet.*

Determining precise location:

- **Excavating within the "Reasonable Accuracy Zone".** Reasonable accuracy means location within 24" of the outside dimensions of both sides of an underground facility.

When excavation activities must occur within 24" of located and marked utilities (where utilities are known to be unlocatable, the area of consideration may need to be extended beyond 24") a planned method of exposing the utility must be utilized. Options include:

- Careful hand digging with fiberglass handled tools / shovels;
- Potholing;
- Use of a vacuum truck;
- Hand tools that use air or water under pressure; and/or
- Other industry accepted non-invasive means.

When any work activity, including sawcutting of concrete or asphalt, must occur within the "Reasonable Tolerance Zone" of located utilities, the utility must be exposed a minimum of 24" beyond the bottom of the utility.

An Andersen Utility Safety Incident & Impact Prevention Plan (USIIPP) must be completed and reviewed with the Andersen Superintendent and Safety Department prior to the work commencing.

When excavating, drilling, driving pile or any other activity that is impacting earth strikes an object within 36" of known utilities, work shall **STOP** until such time as it has been determined to proceed. Determining whether it is safe to proceed may include one of the non-invasive means outlined above.

Should any utility strike occur; stop, safely remove workers if impacted past any insulation and call 911 and/or the utility notification center / facility owner depending upon the circumstances and conditions.

If the utility is natural gas and natural gas is leaking, evacuate the immediate area; keep people and traffic a safe distance away and remove any sources of ignition (open flame, turn off engines / equipment, radios, etc.) around the area of the damaged line until utility arrives.

If the natural gas is burning - let it burn. Do not try to extinguish the gas flame or fire. Call 911.

Shoring and Sloping

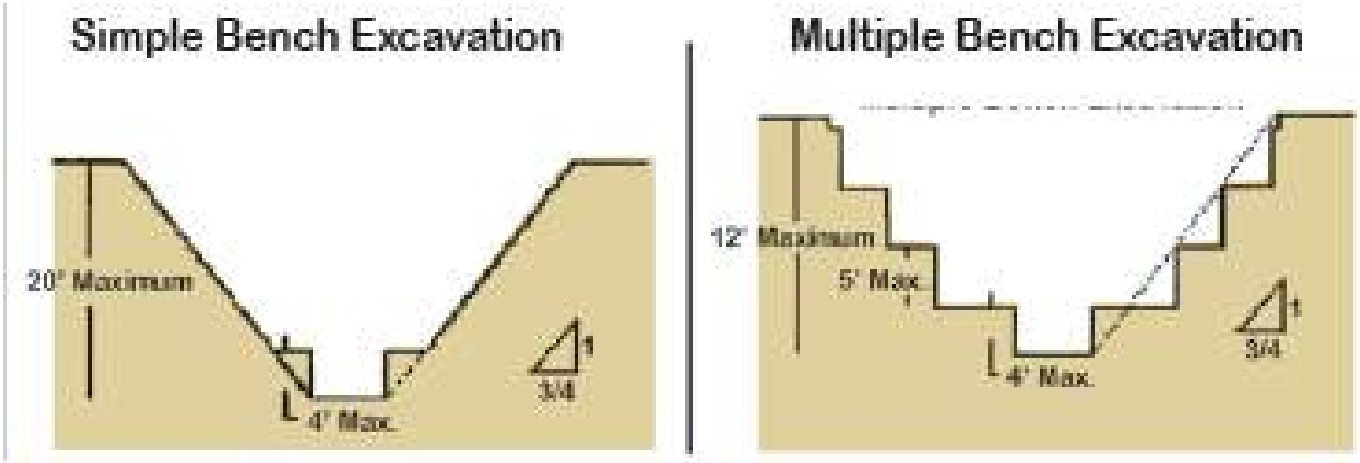
- The sides of all excavations 5 feet or more in depth - 4 feet where otherwise required by code - or where there is a danger of slides or cave-ins at depths less than 5 feet, shall be supported by engineer approved or manufactured shoring or other effective means, *or* sloped in accordance with the applicable OSHA regulations.
- A registered professional engineer must determine the angle of slopes in excavations that are deeper than 20 feet.
- If a soils survey has been conducted and outlines the protective method to be utilized, this survey must be readily available on the jobsite.
- Any excavation that must be shored or sloped must be properly planned and a copy of this plan must be submitted to Andersen.
- Daily inspections shall be submitted to Andersen.
- All excavations or trenches must be inspected by the competent person daily and whenever otherwise required.
- Excavations that will have depths greater than what is allowed by the applicable OSHA standards must either:
  - Be sloped at an angle not steeper than 1 ½: 1 (34 degrees) and in accordance with the slopes shown for Type C soil in the OSHA Excavation appendices for sloping and benching; or
  - A determination of the soil type be made in accordance with the OSHA regulations (this includes a minimum of 1 visual and 1 manual test which should be documented to provide proof of completion) and the sloping and benching be conducted in accordance with the OSHA Excavation appendices for sloping and benching; or
  - Utilize tabulated data and/or OSHA Excavation appendices for support systems, shield systems and other protective systems. Tabulated data or other engineered protective systems are to be used, this data must be readily available on the jobsite; or
  - A protective system designed by a registered professional engineer.

- When using a protective system designed by a registered professional engineer, the following information must be included in the design report:
  - The magnitude of the slopes that were determined to be safe for the protection of people on the project;
  - The configurations that were determined to be safe for project;
  - The identity of the registered professional engineer approving the design. The design documents must contain the registered professional engineer's stamp.
- *All shoring equipment will require tabulated data that verifies its adequacy for the various depths and types of soil for which the equipment is being used*. This plan must be on the job site.
- Access and Egress must be provided in excavations and trenches with depths 4 feet or greater. The maximum travel distance to reach the egress point shall not exceed 25 feet.
- Excavations may need to be monitored for adequate oxygen or gas and chemical hazards.
- Employees must always access the trench or excavation and work within the confines of any required shoring system.
- Surcharge loads such as heavy equipment that exceed 20,000 pounds should maintain a horizontal distance from an excavation edge equal to the depth of the excavation if using OSHA tables for protective systems. *Tabulated data or engineering drawings shall be referenced when using shoring or other soil retention systems.*
- Any entry into a live sewer /storm / sanitary system or sewer line taps should be considered confined space entry and planned as such.
- An excavation "competent person" must be on site when employees are working within an excavation.
- Loads, including excavated loads and loads being handled such as pipe, shall not be lifted over employees.

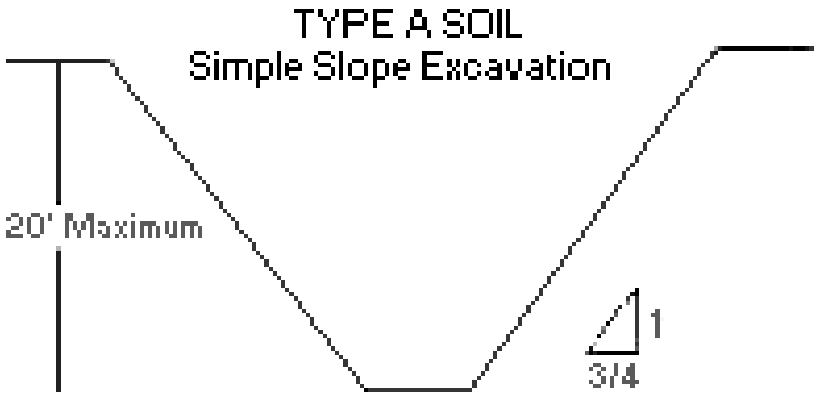
Acceptable Sloping Designs as excerpted from OSHA Subpart P Appendix B

SOIL OR ROCK TYPE	MAXIMUM ALLOWABLE SLOPES (H:V) FOR EXCAVATIONS LESS THAN 20 FEET DEEP
STABLE ROCK	VERTICAL (90 DEGREES)
TYPE A	¾:1 (53 DEGREES) (Multiple benching allowed)
TYPE B	1:1 (45 DEGREES) (Multiple benching allowed)
TYPE C	1 ½:1 (34 DEGREES) (Benching not allowed)

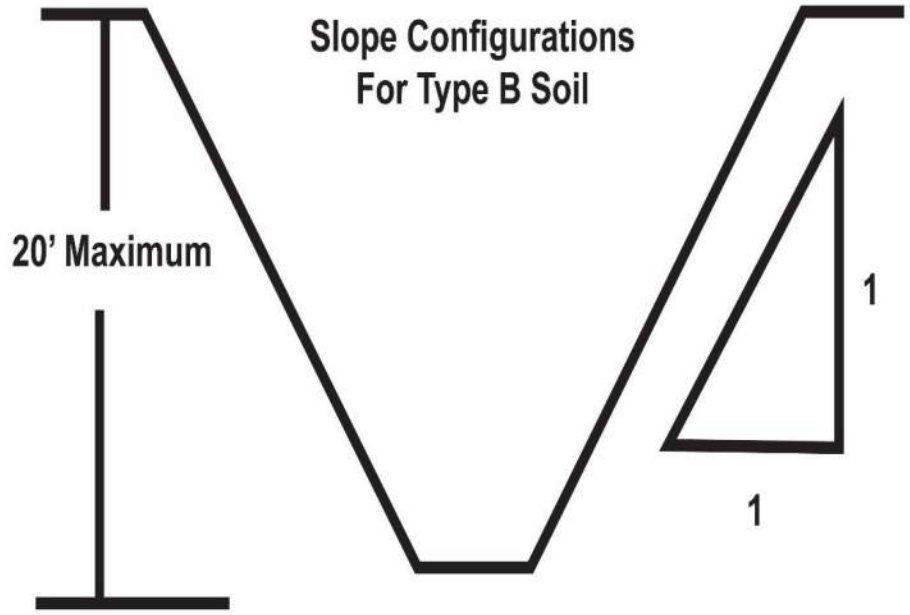
TYPE A SOIL



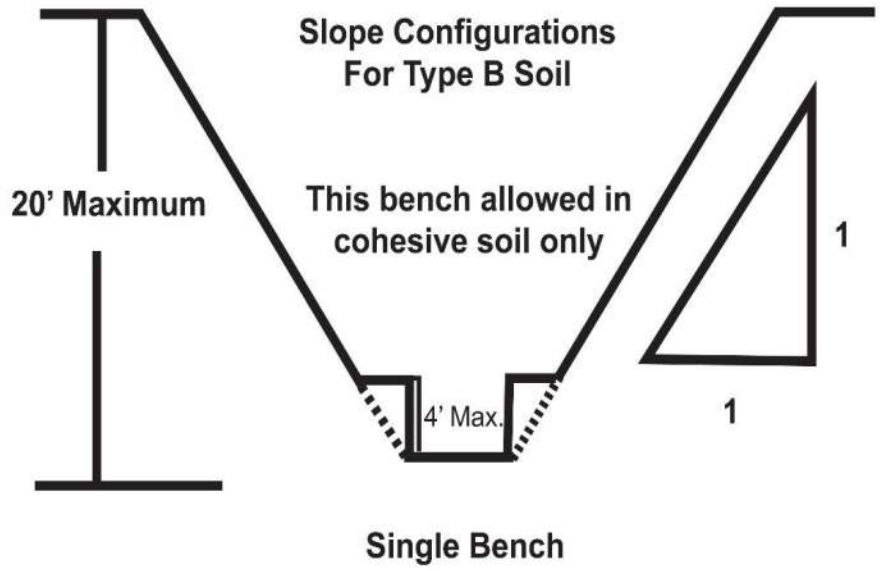
Maximum allowed slope =3/4 : 1 in type A soil.



TYPE B SOIL



Type B - Simple Slope
all simple slope excavations 20 feet or less in depth shall have a maximum allowable slope of 1:1

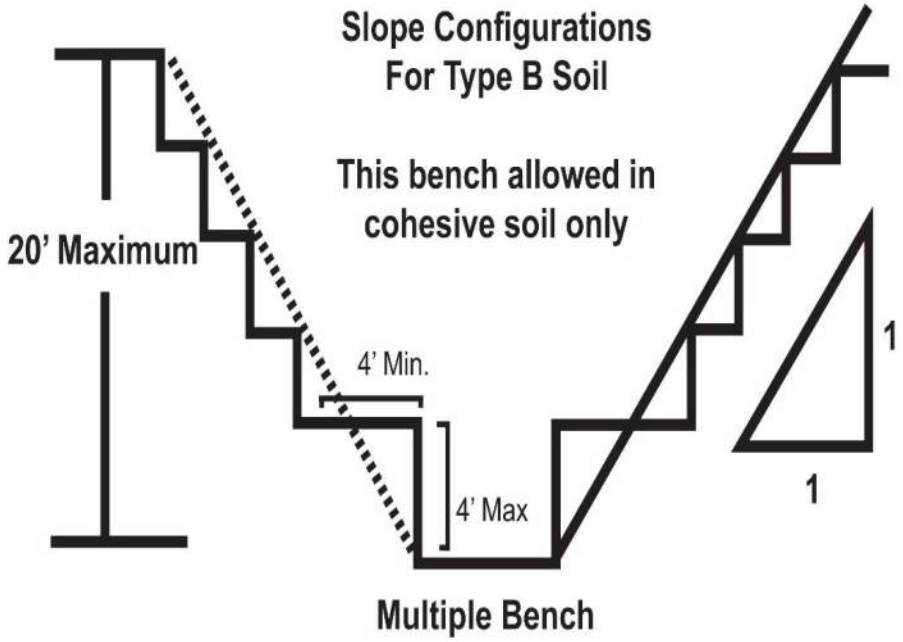


Single Bench

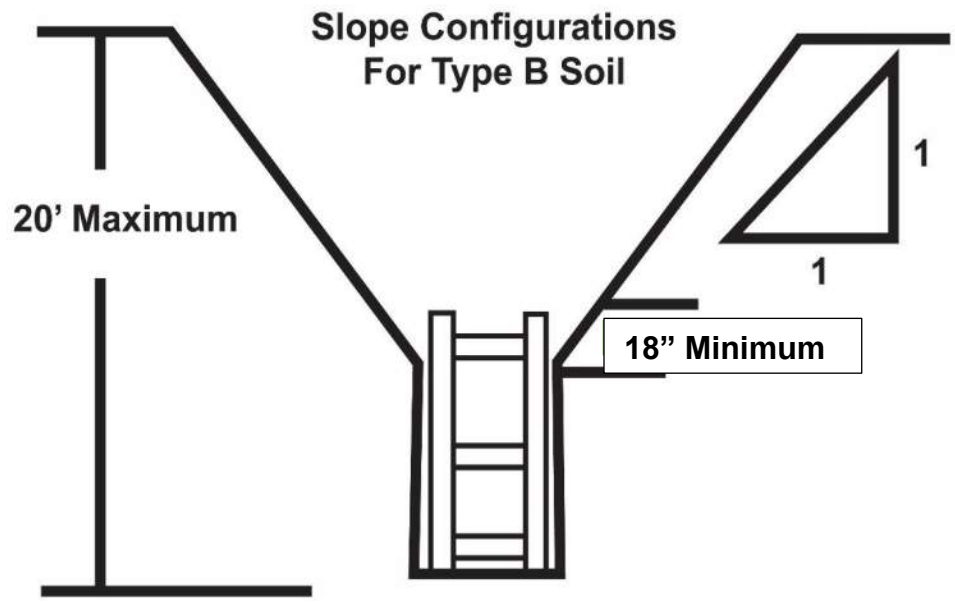
Type B - Single Bench - All excavations 20 feet or less in depth shall have a maximum allowable slope of 1:1 and maximum bench dimensions of 4 feet.

Acceptable Sloping Designs as excerpted from OSHA Subpart P Appendix B

TYPE B SOIL

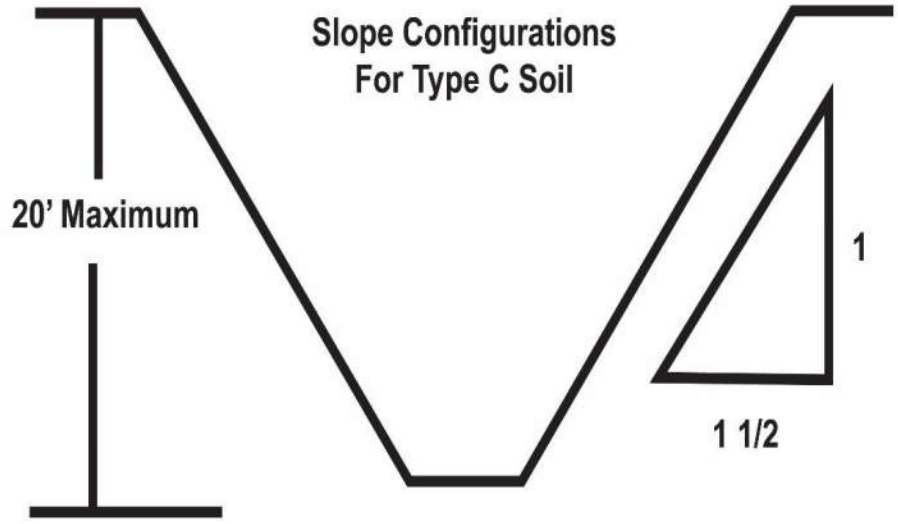


Type B - Multiple Bench - This bench allowed in cohesive soil only.
All excavations 20 feet or less in depth shall have a maximum allowable slope of 1:1 and maximum bench dimensions of 4 feet.



Type B - Vertically Sided Lower Portion.
All excavations 20 feet or less in depth which have vertically sided lower portions shall be shielded or supported to a height at least **18 inches** above the top of the vertical side. All such excavations shall have a maximum allowable slope of 1:1.

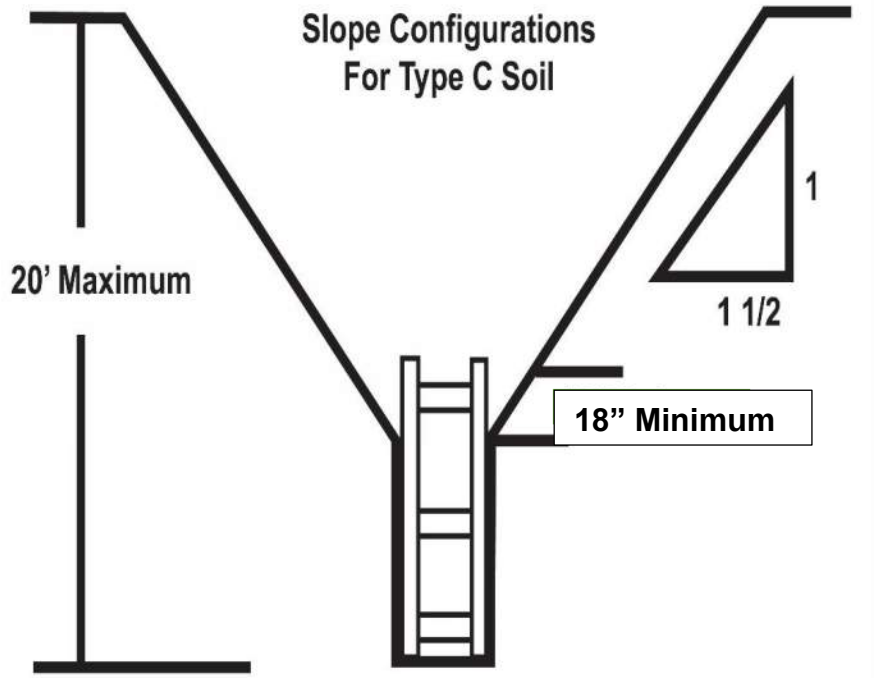
TYPE C SOIL



Type C - Simple Slope

All simple slope excavations 20 feet or less in depth shall have a maximum allowable slope of 1 1/2:1.

Benching in type C soil requires a registered professional engineer



Type C - Vertically Sided Lower Portion

All excavations 20 feet or less in depth which have vertically sided lower portions shall be shielded or supported to a height at **least 18 inches** above the top of the vertical side. All such excavations shall have a maximum allowable slope of 1 1/2:1.

FIRE PREVENTION AND PROTECTION

Fire prevention is a function of planning, organization, good housekeeping and safe work practices. A fire cannot occur unless 3 elements combine together at the same time: combustible materials, heat source and oxygen. These three elements are always present on a construction site. Keep combustible materials picked up and stored away from ignition sources. Place waste and debris in the proper containers. Loose materials and debris will not be tolerated.

Any work that could be an ignition source, such as welding and cutting, may require a hot work permit. Check with your supervisor before beginning hot work. Fire extinguishers shall be located within 20 feet of any hot work and/or welding. When working in existing facilities, become familiar with areas in which hot work can and cannot be done. Become familiar with the Fire/Emergency Plan and evacuation routes.

Basic guidelines for fire prevention and storage of flammable liquids:

- All firefighting equipment shall be conspicuously located.
- A fire extinguisher rated not less than 2A shall be available on each floor in multi-story buildings and at least one fire extinguisher shall be located adjacent to stairways.
- **Fire extinguishers shall have documented visual monthly inspections**.
- If fire extinguishers are the main method of firefighting equipment, an extinguisher rated not less than 2A shall be provided for each 3000 square feet of protected building area.
- Travel distance from any point of the protected area to the nearest fire extinguisher shall not exceed 100 feet.
- A fire extinguisher rated not less than 10B shall be provided within 50 feet of where 5 or more gallons of flammable or combustible liquids are being stored or used.
- No combustible material shall be stored outdoors within 10 feet of a building or structure.
- No more than 25 gallons of flammable or combustible liquids shall be stored in a room outside of an approved storage cabinet.
- Outside storage of flammable or combustible liquids shall not exceed 1100 gallons in any one pile or area and not within 20 feet of a building.
- Portable tanks for the storage of flammable or combustible liquids shall be provided with some method of containing and controlling any spills. Overhead weather protection may be necessary.
- Storage of LPG (liquid petroleum gas) within buildings is prohibited.
- No flammables will be stored inside tool trailers or other closed structures. Approved safety containers will be used for storage and handling of flammable liquids.
- No smoking is permitted within 25 feet of any flammable liquid storage or dispensing area. No smoking signs shall be posted.
- Tampering with or unauthorized removal of fire extinguishers from assigned locations is prohibited.
- Fire extinguishers used in occupied healthcare facilities shall be identified with a number and the owner's name. A map of the fire extinguishers located in the field shall be kept with a complete listing of the extinguishers monthly inspections.
- Portable tanks with pumps shall have a means of locking the pump.
- Sources of ignition shall be prohibited from areas where flammable liquids or explosives are stored or issued, and appropriate warning signs shall be posted at these locations.

To properly use a fire extinguisher, remember PASS:

Compressed Gases

- Compressed Gas Cylinders shall be chained or secured in an upright position at all times and shall be placed in cylinder carts whenever being transported to different locations on the project
- Compressed gas cylinders of different category or incompatibility must be properly stored with a 20-foot separation between different categories of gases or with a 30-minute fire resistant barrier at least 5 feet high between different gas cylinders.
- Keep caps on compressed gas cylinders equipped with valve protective caps at all times - except when being filled or connected for use.
- Compressed gas cylinders shall only be stored on the cart when connected for use. Cylinders shall only be connected for use when the cylinders will be used within 24 hours.
- When storing compressed gas cylinders on carts, use carts of the type that provide protection to the regulators.
- Compressed gas cylinders shall be stored such that they will not be exposed to direct heating to increase vapor pressure.
- Compressed gas cylinders shall be stored in such a manner as to be protected from vehicle damage.

- Compressed gas cylinders stored outside shall not be placed on the ground (earth) or on surfaces where water can accumulate.

Temporary Heating Devices & LPG

- Solid fuel salamanders are prohibited.
- Adequate insulation shall be provided on combustible floors,
- Mechanical ventilation shall be provided when fresh air supply is inadequate to maintain worker health,
- Temporary heaters shall not be used in confined spaces.
- Temporary heaters shall be inspected each day prior to use. Heaters will not be modified or altered.
- *LPG containers are not to be stored indoors. Store LPG containers in a well-ventilated area.*
- *LPG or gas fired heaters shall not be used inside occupied structures without the Authority Having Jurisdiction's (AHJ) approval. The AHJ will typically be the local fire marshal.*
- **LPG containers shall be stored on secure foundation or secured.**

WELDING AND CUTTING

A hot work permit is required when any welding, cutting, or spark producing activities will take place in an area where a fire is a potential hazard (e.g. work in semi-finished or finished areas). The hot work permit forms will be issued by and must be signed by Andersen and a subcontractor representative.

Fire watch shall be provided when hot work permits are required or whenever there are other combustibles within a 35' radius of spark producing work. Fire watch will remain up to 30 minutes after work has ceased and longer if deemed necessary.

- HEPA filtered equipment must be used to capture fumes / dust in areas where there is a possibility of workers being exposed above the permissible exposure level.
- Floors must be swept and combustibles removed.
- Wall and floor openings covered.
- No combustible materials within 35 feet of work.

Written Fire Prevention Plans will be followed and include fire extinguishers, hot work permits, fire blankets and fire watch.

Prior to the beginning of hot work, each contractor shall ascertain that employees are instructed in the following:

- The work to be performed;
- The precautions to be taken;
- How to use fire extinguishers;
- Emergency response techniques; and
- Work stoppage protocols for possible exposures.

Employers will ensure adequate respiratory protection during any welding, cutting and heating operations unless a negative exposure assessment has ascertained it not to be necessary.

All hoses shall be frequently inspected for leaks, worn places, and loose connections. All hoses shall be elevated at least 8 feet above the work where feasible so as not to prevent the safe passage of workers and equipment.

Compressed gas cylinders shall not be stored inside of any structure – this includes gang boxes, storage trailers and similar closed spaces.

All arc welding and cutting operations shall be shielded by noncombustible or flameproof screens when possible.

TOOLS – HAND AND POWER

Only authorized personnel shall operate power tools; and only then with proper guards “in place”. Electric powered hand tools shall be grounded or of the double-insulated type.

Utility and fixed knife use should be reviewed based on tasks required. Use of non-self-retracting utility knifes should be eliminated wherever possible.

Hand tools, such as hammers and chisels, should be well maintained to prevent injury from flying particles. Ergonomic hand tools are encouraged when available.

Power Tools and Extension Cords / Assured Grounding

Working with power and hand tools is a daily occurrence on a construction site. These tools and equipment must be operated in a safe manner. When you are assigned to operate a power tool, be sure you are familiar with its safe operation. A new tool that appears to be exactly the same as the old tool may be slightly different. Do not operate it until you understand the operations manual and a foreman has explained how to use it safely.

- Only UL listed equipment shall be used.
- All electrical equipment, temporary receptacles and cords must be inspected and color-coded quarterly in accordance with an assured equipment grounding protection program. This includes all subcontractors' equipment brought on site. Cord sets not in-compliance with an inspection program will be removed from service. Only competent persons trained in the proper testing procedures shall be allowed to conduct testing according with an assured equipment grounding program. For testing and repair of 240 volt or greater temporary electrical cord, the site electrician would be the preferred competent person.

Major Hazards associated with portable power tools

- Torque is the circular or rotating motion in tools such as drills, impact wrenches, and saws that results in a strong twisting force. Be prepared in case of jamming.
- Have good footing, use two hands, help as assigned, and be ready to release the power switch or trigger (this should be fail-safe so that it cannot be locked “on”).
- Flying objects can result from operating almost any power tool so you must always warn people around you and use proper eye protection.
- Beware of swinging around with the tool running; someone might be beside you.
- Tool condition should be monitored. Examine each power tool before using it. Look for damaged parts, loose fitting, and frayed or cut electric cords. Tag and return defective tools for repair.
- Air must be shut off or the electric cord unplugged before making tool adjustments. Air must be “bled down” before replacement or disconnection.

Operating Practices

- Wear any required PPE (i.e., safety glasses or hearing protection).
- Loose clothing, long hair, rings, and other jewelry must not be worn around operating machines. Keep sleeves buttoned or rolled up.
- Keep fingers away from moving parts. Shut off machines to remove waste. Use a brush to clean up and deburr. Be sure the machine is stopped and not coasting!
- Inspect at least daily before start-up. Look for loose or damaged parts, adequate lighting, lubrication, and abandoned tools or material that could “vibrate into trouble”.

- Use clamps or vises to hold work wherever possible.
- Clear the immediate work area of other craft workers and obstacles.
- All temporary 125 volt, single-phase, 15- 20- and 30-ampere receptacle outlets shall have ground-fault circuit interrupter protection for personnel. Personnel using permanent 125-volt receptacles for temporary power shall be provided ground fault circuit protection.

Powder Actuated Tools:

Approved powder actuated tools shall be used by authorized personnel only, and operated in compliance with regulations set forth in the applicable OSHA regulations.

- Signs warning of use must be posted where powder actuated tools are in use.
- Hearing protection must be worn during powder actuated tool use.
- Loaded powder actuated tools must not be left unattended, even during breaks or other short absences.
- Spent loads, especially those with misfires, shall be gathered and stored in a secure location. They shall not be left on the floor, ground or laying around.

Tool Use and Potential to Impact Power:

- Prior to working with jackhammers, pry bars, chipping guns, rotohammers or other hand tools or whenever concrete cutting and coring will be conducted, determine if there is a potential power source in the area of impact. Any identified power source must be located and adequately marked.
- Whenever the potential exists for electric power lines (underground, in concrete slabs or walls) to be impacted by tools the power source must be locked out and tagged out by an authorized person prior to work commencing when possible.
- Whenever a potential electric power source exists in an area to be impacted by hand and power tools; and the power source cannot be exactly identified and locked out / tagged out, employees using tools which may contact the power source must be provided with insulated protective gloves and any other required PPE as may be required by NFPA or other applicable regulations. Andersen employees who must use insulated protective gloves or other NFPA required PPE must contact the safety department to obtain said PPE. Subcontractor employees must provide Andersen verification of the required inspection and testing of the insulated gloves.

ELECTRICAL

Jobsite Lighting

- Lighting in general construction areas and indoor construction areas such as warehouses, corridors, hallways and exit ways shall be a minimum of 5 foot candles.
- Lighting in general construction areas such as concrete placement, excavation and waste areas, access ways, active storage areas, loading platforms, refueling and field maintenance areas shall be a minimum of 3 foot candles.
- Lighting in general construction plant and shops, equipment rooms, carpenter shops, rigging lofts and active storage rooms or other indoor work rooms shall be a minimum of 10 foot candles.
- Lighting in first aid stations and offices shall be a minimum of 30 foot candles.
- Lighting at transition points should be monitored frequently or as weather changes to ensure it is adequate for the activity occurring.
- Light strings shall be strung 7 – 8 feet overhead to prevent crushing of the lights and tripping hazards.
- Light strings shall utilize the designated hanger or use plastic zip ties to hang light strings – do not wrap with wire.
- Replace broken bulbs and cages to reduce potential for shock.
- When using light stands, ensure cages are in place over the bulbs.
- If using or working in a building with metal halide bulbs, ensure the outer protective jacket is intact.
- If using wobble lights, refer to the manufacturers usage directions to ensure that the maximum number of lights that can be linked together is not exceeded.
- Receptacles for uses other than temporary lighting shall not be installed on branch circuits which supply temporary lighting. Receptacles shall not be connected to the same ungrounded conductor of multi-wire circuits which supply temporary lighting.
- All lamps for general illumination shall be protected from accidental contact or breakage. Metal-case sockets shall be grounded.
- Temporary lights shall not be suspended by their electric cords unless cords and lights are designed for this means of suspension.
- Portable electric lighting used in wet and/or other conductive locations (e.g., drums, tanks, and vessels), shall be operated at 12 volts or less. However, 120-volt lights may be used if protected by a ground-fault circuit interrupter.
- Portable lamps shall be wired with flexible cord and an attachment plug of the polarized or grounding type. If the portable lamp uses an Edison-based lamp holder, the grounded conductor shall be identified and attached to the screw shell and the identified blade of the attachment plug. In addition, portable handlamps shall comply with the following:
  - Metal shell, paper lined lamp holders shall not be used;
  - Handlamps shall be equipped with a handle of molded composition or other insulating material;
  - Handlamps shall be equipped with a substantial guard attached to the lamp holder or handle;
  - Metallic guards shall be grounded by the means of an equipment grounding conductor run within the power supply cord.
  - Lamp holders of the screw-shell type shall be installed for use as lamp holders only. Lamp holders installed in wet or damp locations shall be of the weatherproof type.

Overhead Power

- Always maintain a minimum 20-foot clearance from overhead power lines with cranes and a minimum of 10-foot clearance with all other equipment or scaffolding unless the state required protective measures have been taken.
- Post warning signs whenever overhead power lines are located such that they run adjacent to or through the work area and the potential exists for equipment, scaffold work, crane activities or other similar activities to approach the restricted area.
- Use an observer when it becomes difficult for equipment operators to determine the required 20-foot clearance.
- Any work within 20 feet of overhead high voltage power lines may require authorization from the utility owner as well as the de-energizing and visible grounding of the high voltage system or prevention of accidental contact by the use of insulating guards or barriers that insulate against the system's maximum voltage.
- **Only** the utility owner can conduct the de-energizing and grounding or installation of insulating guards.
- No employee or equipment may work within 20 feet of overhead high voltage power lines with cranes or other equipment which has potential to contact the power lines. Some types of heavy equipment may be legally allowed to work with 20 feet, but not 10. Check with local AHJ / OSHA regulations.
- Post warning signs whenever overhead power lines are located such that they run adjacent to or through the work area and the potential exists for equipment, scaffold work, crane activities or other similar activities to approach the restricted area.

Underground Power

See Trenching and Excavations for Underground Utility Safety Impact Prevention Program

- When working with jackhammers, pry bars, chipping guns, rotohammers or other hand tools or whenever concrete cutting and coring will be conducted, it must first be determined if there is a potential power source in the area of impact. Any identified power source must be located and adequately marked.
- Whenever the potential exists for electric power lines (underground, in concrete slabs or walls) to be impacted by tools the power source must be locked out and tagged out by an authorized person prior to work commencing.
- Whenever a potential electric power source exists in an area to be impacted by hand and power tools and the power source cannot be exactly identified and locked out / tagged out, employees using tools which may contact the power source must be provided with insulated protective gloves and any other required PPE as may be required by NFPA or other applicable regulations. Andersen employees who must use insulated protective gloves or other NFPA required PPE must contact the safety department to obtain said PPE. Subcontractor employees must provide Andersen verification of the required inspection and testing of the insulated gloves.
- The location of buried or located power sources must be identified and maintained on a set of plans to be posted in the jobsite office.

Temporary Power

- *All temporary power (extension) cords 50' or less in length shall be a minimum of 14 AWG and all temporary power cords 50' to 100' in length shall be a minimum of 12 AWG.*
- *All temporary power cords shall be rated for the tool in use.*
- Only UL listed equipment shall be used.

- Extension cord sets used with portable electric tools and appliances shall be of three-wire type and shall be designed for hard or extra-hard usage. Examples include types S, ST, SO, STO and types SJ, SJO, SJT, and SJTO. Additionally, all extension cords, 3-ways, surge suppressors, adapters, and power strips will be rated for outdoor use. Indoor use only temporary power cords are not authorized.
- S indicates hard service while SJ is light duty service. S is the preferred service type.
- All temporary, 125 volt, single-phase, 15- 20- and 30- ampere receptacle outlets shall have ground-fault circuit interrupter protection for personnel.
- When using existing house power, a ground fault circuit interrupter shall be used between the power tool and the receptacle. Temporary power cords shall be protected from damage. This includes protection from vehicular traffic.
- When possible temporary power cords should be hung when the cord is designed for such. Power cords shall not be hung with metallic devices. Only UL listed equipment shall be used.
- To assist with the assurance of properly working tools and electrical equipment, an assured grounding inspection program shall still be in effect.
- Damaged electrical cords will be repaired with heat shrink material only. Electrical tape repairs are not permitted.
- Repaired electrical cords and equipment will be returned to the UL listed type and rating required by the manufacturer. Replacement cords and plugs shall be of the same type and rating as originally manufactured equipment.
- Temporary lighting shall be caged and of the molded type consisting of manufacturers fixed lights. Contractor assembled, multiple conductor (single wire) or Romex stringers with pigtails will not be acceptable.
- Temporary and permanent power that is not readily visible (such as temporary power cord running through the jobsite above a slab) must be protected from traffic, impact or other damage. Signs warning personnel of the existing hazard, its location and measures to be taken to work near the power circuit must be posted.
- Temporary power that will be buried underground must be protected with a minimum of 3 inches of concrete and 18” of backfill. Flexible stakes that extend 5 feet above the ground surface must be applied to the power conduit prior to backfill and concrete being placed. The stakes must identify the power source, its location and be non-conductive. Additional marking or locating of the buried power source must be maintained during the project.
- The location of buried or located power sources must be identified and maintained on a set of plans to be posted in the jobsite office.
- Andersen may require extra planning and potholing whenever any excavation, drilling, piling or saw cutting activities will take place within the reasonable tolerance zone of identified underground utilities.
- If any drilling, excavating or piling activities will take place within the Reasonable Tolerance Zone of located utilities or under located utilities, potholing must extend a minimum of 24” beyond the bottom of the located utility.
- Refer to local "locate" rules for guidelines on locate parameters, duration of markings allowed, requirements to maintain locate markings and non-intrusive digging information.

Assured Grounding Marking Method. Cords should be marked at both ends.

Months	Color Marking Tape		Corresponding Season
January to March	White Marking		Winter
April to June	Green		Spring
July to September	Red		Summer
October to December	Orange		Fall

Any equipment found to be defective or not marked according to this program must be taken out of service and tagged.

LOCK-OUT/TAG-OUT

The purpose of Lock-Out/Tag-Out safety procedures is to prevent an injury or accident while working on tools, equipment, or systems that may be energized or have stored energy (water and liquids can be considered as energized or stored energy) that could seriously injure a worker if the energy was inadvertently released.

Lock-Out/Tag-Out procedures apply to more than just electrical energy systems. Serious injury can also result from mechanical, piping and hydraulic energized systems, or the forces of gravity. Remember to blank out or disconnect pipe systems, unplug a saw before changing its blade, and block up equipment that might fall over.

In Facilities, the owner may have their own Lock-Out/Tag-Out procedures that may need to be followed. Some jobsites may also have special Lock-Out/Tag-Out procedures that may need to be followed. Check with your supervisor.

General Lock-Out/Tag-Out Rules:

- While working, always take the steps necessary to assure that energy cannot be released which could harm you. Never assume that someone else made the system safe for you. After a system has been locked out be sure to test it. Be sure you are clear of potential harm from stored energy before you lock out a system. Also, be sure to re-check a system if it is left locked out overnight. Do not assume that it is still locked out. Always remember: 1 lock, 1 key, 1 person.
- Only qualified, licensed elevator personnel shall lock out elevators.
- Only qualified, trained and licensed shall lock out electrical systems. Andersen as a matter of course does not conduct Lock out Tag Out activities. Each jobsite electrical contractor will be expected to submit their job Lock out Tag Out policies and procedures for covered work on the respective project.
- Only trained, qualified and authorized persons may lock out and Tag Out other unidentified hazardous energy sources such as steam or gas.
- Anyone performing repair and maintenance work on forklifts, aerial lifts, or other heavy equipment that can have a hazardous source of energy such as hydraulic, pneumatic and kinetic / gravity must be properly trained and authorized to conduct the Lock Out Tag Out required prior to performing the work.
- A task specific, written Lock Out / Tag Out Plan may be required. Depending upon the complexity of the work the Plan may need to be more in-depth than a PTP and take the form of a Method of Procedures (MOPs).

ENERGIZED ELECTRICAL WORK

Energized Electrical Work (EEW) shall not be conducted unless the requirement for the work meets the exceptions for EEW as outlined in NFPA 70(e). The competent person who conducted the job evaluation shall document the reasons for not de-energizing and doing “energized electrical work” and the areas where “energized electrical work” will be performed and any special precautions or PPE needed.

The following procedural steps shall be used when EEW is performed:

- Shock Hazard Analysis, which should include:
  - The voltage to which personnel will be exposed;
  - Boundary requirements; and
  - PPE.
- Flash Hazard Analysis, which shall:
  - Identify ways to protect personnel from the possibility of being injured by an arc flash;
  - Determine the flash protection boundary; and
  - Determine the PPE required within the flash protection boundary.
- PPE Assessment
- Job Briefing, which shall include:
  - Point out hazardous grounding surfaces in the area;
  - The hazards of the job;
  - Work procedures to be used;
  - Insulated tools required;
  - Special precautions; and
  - Ensure all assigned employees are qualified to perform the task.
  - Permit completed and work authorized by the following:
    - Electrical Contractor Supervisor
    - Electrical Contractor Safety Supervisor
    - Campus Owner Representative
    - Campus Owner Safety Representative
    - Andersen Superintendent
    - Andersen Management or Safety Representative
- Consideration should be given to the impact to the facility in the event of arc or other issue.
- A contingency plan should be in place in case of damage to equipment.

EEW activities shall not be conducted until all required meetings have occurred, authorizations received and documentation completed.

Dependent upon the nature and hazard of the activity, notification of the EEW work may need to be made to Andersen's Corporate Office. Examples of such times include:

- Failure, accident or arc blast that can damage critical electrical systems.
- The hazard risk category is greater than 2

EEW shall include a task and hazard appropriate work plan. Dependent upon the complexity of the work activities to be undertaken, the Pre-Task Plan may need to take the form of a Method of Procedures (MOPs). All MOPs shall include the Lock Out Tag Out Plan and/or diagram, the PPE and tool listing.

CONFINED SPACES

The purpose of Confined Space Entry Safety Procedures is to assure that all employees recognize and avoid entering a confined space that may contain a hazardous atmosphere. The majority of confined space accidents are fatal and individuals attempting to rescue others account for 60% of the fatalities.

A confined space is a space that:

- Is large enough and so configured that an employee can bodily enter it;
- Has limited or restricted means for entry and exit; and
- Is not designed for continuous human occupancy.

A permit required confined space is a confined space that has one or more of the following characteristics:

- Contains or has a potential to contain a hazardous atmosphere such as a lack of oxygen;
- Contains a material that has the potential for engulfing an entrant;
- Has an internal configuration such that an entrant could be trapped or asphyxiated by inwardly converging walls or by a floor which slopes downward and tapers to a smaller cross-section; or
- Contains any other recognized serious safety or health hazard.

Physical hazard means an existing or potential hazard that can cause death or serious physical damage. Examples include, but are not limited to: explosives, mechanical, electrical, hydraulic and pneumatic energy; radiation; temperature extremes; engulfment; noise; and inwardly converging surfaces. Physical hazard also includes chemicals that can cause death or serious physical damage through skin or eye contact.

Traditional confined spaces include manholes, tanks, silos, and storage tanks. On construction sites, other confined spaces may include trenches, crawlspaces, attics, HVAC units and mezzanines. Areas with incomplete/inoperative ventilation systems can be a hazard during construction phases, especially during welding. Initially safe areas can become confined if work-involving coating applications and/or toxic/inert gases are being performed.

Until verified or proven otherwise, confined spaces should be assumed to be permit required.

Confined space entrants must be properly trained. Employers with employees entering permit required confined spaces must have a written permit required confined space entry program complete with training and entry requirements.

Confined Spaces shall not be entered until all entry steps and procedures, including any required atmospheric testing, have been followed and verified.

Once built or otherwise identified, post appropriate signage to identify the space as a confined space.

DEMOLITION

All demolition activities require a Demolition Plan that is specific to the type of the demolition and type of hazards that will be associated with the structure being renovated, remodeled or demolished. A copy of the engineering survey shall be readily available and used for reference during the planning and work phases. Contact Andersen safety office for a Demolition Checklist for Lead and Asbestos as well as other demolition hazards. A Demolition Plan should also include any necessary PPE and personal sampling plans.

In addition to OSHA regulations, there may be other standards that should be referenced during plan development. These include but may not be limited to:

- ANSI A10.34 – Protection of the Public
- ANSI A10.6 – Safety Requirements for Construction and Demolition Operations
- ANSI A10.1- Project Pre-Planning
- NFPA 241 – Standard for Safeguarding Construction

A hazardous materials survey will almost always be required prior to any renovation, remodeling or demolition work. The EPA requires an asbestos survey be conducted by an AHERA certified inspector prior to any renovation, remodel or demolition activities. In any building built prior to 1980, any paint must be tested for lead. The most typical hazardous substances that should be included in a survey, depending upon presence includes but is not limited to:

- Asbestos;
- Lead, including lead based paint;
- Paints containing cadmium or chromium;
- PCB containing light ballasts'
- Mercury containing thermostats; and
- Fluorescent lamps & High intensity discharge (HID) lamps, including mercury vapor, high pressure sodium and metal halide lamps.

Other things to consider when conducting manual demolition include electrical systems, medical gases, hand and back injuries and housekeeping. All electric, gas, water, steam, sewer and other service lines shall be shut off, capped or otherwise controlled outside the building line before complete building demolition work is started. In each case, any utility company which is involved shall be notified in advance.

Where a hazard exists from fragmentation of glass, such hazards shall be removed.

No material shall be dropped to any point lying outside the exterior walls of the structure unless the area is effectively protected by barricades a minimum of 42" high and 6' back from the projected edge of the opening above.

Chute openings into which workmen dump debris, shall be protected by a substantial guardrail approximately 42 inches above the floor or other surface on which the men stand to dump the material. Any space between the chute and the edge of openings in the floors through which it passes shall be solidly covered over.

Chutes made of flammable materials and attached to multiple floors of a structure under construction or deconstruction may require the building to be sprinklered or utilize a fire watch and movement of the

trash bin away from the building each night. Check the local Fire Marshall's regulations governing combustible trash chutes.

ASBESTOS LEAD AND SILICA

Asbestos and lead are known to be hazardous substances that if disturbed can cause serious health issues. Prior to impacting building structures with potential to contain such substances, an appropriate survey must be conducted. A copy of the survey must be readily available onsite.

Asbestos:

EPA regulations require the owner or operator of the building where any demolition or renovation activities will be undertaken to have conducted an asbestos survey. This asbestos survey must be conducted by an accredited inspector.

All tradespersons conducting work at a facility where ACM or PACM is known or suspected to exist will be required to have the minimum hazard awareness training as outlined in the applicable regulations. Documentation must be provided with the subcontractor's Site-Specific Safety Plan. This training must be renewed annually.

Copies of all surveys, worker training documentation and exposure assessments must be sent to Andersen's Corporate Safety Department and/or uploaded to the location as designated by Andersen's Corporate Safety Department.

Clearance samples must be conducted by an independent third party when local jurisdictions mandate and for any friable asbestos abatement.

Andersen personnel may obtain a complete listing of required documentation from Andersen's webserver.

Common building materials where asbestos can be found include:

- Roofing and siding shingles;
- Ceiling and floor tiles;
- Paper products;
- Asbestos cement products such as siding and pipe;
- Attic and wall insulation containing vermiculite;
- Vinyl floor tiles and the backing on vinyl sheet flooring and adhesives;
- Textured paint and patching compounds used on walls and ceilings;
- Walls and floors around wood-burning stoves protected with asbestos paper, millboard or cement sheets;
- Hot water and steam pipes coated with asbestos material or covered with an asbestos blanket or tape;
- Oil and coal furnaces and door gaskets with asbestos insulation;
- Heat resistant fabrics; and
- Automobile clutches and brakes.

It is important to know that the manufacture, importation, processing and distribution in commerce of asbestos is not banned in many products, thus necessitating the need for a survey for all renovations and demolitions of suspect materials.

Lead:

A lead survey may need to be conducted prior to renovation of any structure built before 1980.

Any worksite with lead based paint, lead lined sheetrock or lead sheeting or other lead components that may be impacted by work activities will require hazard awareness training, PPE, and a Site-Specific Lead Work Plan. For more information contact an Andersen Safety representative.

Any structure built prior to 1978 and is a residential or child occupied facility and contains lead based paint in excess of 0.5% lead will require contractors whose scope of work disturbs lead containing surfaces to have a Lead Repair Renovation and Painting license. For more information contact Andersen's Corporate Safety Department.

Copies of all surveys, worker training documentation and exposure assessments must be sent to Andersen's Corporate Safety Department and/or uploaded to the location as designated.

Silica

Crystalline silica is an important industrial material found abundantly in the earth’s crust. Quartz, the most common form of silica, is a component of sand, stone, rock, concrete, brick, block, and mortar. Silica dust is hazardous when very small particles are inhaled.

Occupational exposure to respirable crystalline silica occurs when cutting, sawing, drilling, and crushing of concrete, brick, ceramic tile, rock and stone products. Employers whose employees may be exposed to respirable silica are required to implement a written Exposure Control Plan that identifies the tasks involved and methods to protect workers. The following table, as excerpted from the Federal Rule 1926.1153 can be used as a reference for tasks and their required engineering and work control practice control methods and personal protective equipment. For the complete table see 29 CFR 1926.1153.

TABLE 1 (EXCERPTS) SPECIFIED EXPOSURE CONTROL METHODS WHEN WORKING WITH MATERIALS CONTAINING CRYSTALLINE SILICA

Equipment / Task	***Engineering & Work Practice***	***Required Respiratory Protection & Minimum Assigned Protection Factors***	
		≤ 4 hours / shift	***> 4 hours / shift***
Stationary masonry saws	*Use saw equipped with integrated water delivery system that continuously feeds water to the blade.* *Operate and maintain tool in accordance with manufacturer's instructions to minimize dust emissions.*	*None*	*None*
Handheld power saws (any blade diameter)	*Use saw equipped with integrated water delivery system that continuously feeds water to the blade.* *Operate and maintain tool in accordance with manufacturer's instructions to minimize dust emissions.*		
	− When used outdoors.	*None*	*APF 10*
	− When used indoors or in an enclosed area.	*APF 10*	*APF 10*
Handheld power saws for cutting fiber-cement board (with blade diameter of 8 inches or less)	***For tasks performed outdoors only:*** *Use saw equipped with commercially available dust collection system.* *Operate and maintain tool in accordance with manufacturer's instructions to minimize dust emissions.* *Dust collector must provide the air flow recommended by the tool manufacturer, or greater, and have a filter with 99% or greater efficiency.*	*None*	*None*

Equipment / Task	***Engineering & Work Practice***	***Required Respiratory Protection & Minimum Assigned Protection Factors***	
		≤ 4 hours / shift	***> 4 hours / shift***
Walk behind saws	*Use saw equipped with integrated water delivery system that continuously feeds water to the blade.* *Operate and maintain tool in accordance with manufacturer's instructions to minimize dust emissions.*		
	− When used outdoors	*None*	*None*
	- When used indoors or in an enclosed area.	*APF 10*	*APF 10*
Rig-mounted core saws or drills	*Use tool equipped with integrated water delivery system that supplies water to cutting surface.* *Operate and maintain tool in accordance with manufacturer's instructions to minimize dust emissions.*	*None*	*None*
Handheld and stand mounted drills (including impact and rotary hammer drills)	*Use drill equipped with commercially available shroud or cowling with dust collection system.* *Operate and maintain tool in accordance with manufacturer's instructions to minimize dust emissions.* *Dust collector must provide the air flow recommended by the tool manufacturer, or greater, and have a filter with 99% or greater efficiency and a filter-cleaning mechanism.* *Use a HEPA-filtered vacuum when cleaning holes.*	*None*	*None*
Dowel drilling rigs for concrete	*For tasks performed outdoors only:* *Use shroud around drill bit with a dust collection system. Dust collector must have a filter with 99% or greater efficiency and a filter-cleaning mechanism.* *Use a HEPA filtered vacuum when cleaning holes.*	*APF 10*	*APF 10*

Equipment / Task	***Engineering & Work Practice***	***Required Respiratory Protection & Minimum Assigned Protection Factors***	
		≤ 4 hours / shift	***> 4 hours / shift***
Jack hammers and handheld powered chipping tools.	*Use tool with water delivery system that supplies a continuous stream or spray of water at the point of impact.*		
	− When used outdoors.	*None*	*APF 10*
	− When used indoors or in an enclosed area	*APF 10*	*APF 10*
	OR		
	Use tool equipped with commercially available shroud and dust collection system. *Operate and maintain tool in accordance with manufacturer's instructions to minimize dust emissions.* *Dust collector must provide the air flow recommended by the tool manufacturer, or greater, and have a filter with 99% or greater efficiency and a filter-cleaning mechanism.*		
	− When used outdoors.	*None*	*APF 10*
	− When used indoors or in an enclosed area.	*APF 10*	*APF 10*

Equipment / Task	***Engineering & Work Practice***	***Required Respiratory Protection & Minimum Assigned Protection Factors***	
		≤ 4 hours / shift	***> 4 hours / shift***
Handheld grinders for mortar removal (i.e. tuckpointing)	*Use grinder equipped with commercially available shroud and dust collection system.* *Operate and maintain tool in accordance with manufacturer's instructions to minimize dust emissions.* *Dust collector must provide 25 cubic feet per minute (cfm) or greater of airflow per inch of wheel diameter and have a filter with 99% or greater efficiency and a cyclonic pre-separator or filter-cleaning mechanism.*	*APF 10*	*APF 25*
Handheld grinders for uses other than mortar removal	*For tasks performed outdoors only:* *Use grinder equipped with integrated water delivery system that continuously feeds water to the grinding surface.* *Operate and maintain tool in accordance with manufacturer's instructions to minimize dust emissions.*	*None*	*None*
	OR		
	Use grinder equipped with commercially available shroud and dust collection system. *Operate and maintain tool in accordance with manufacturer's instructions to minimize dust emissions.* *Dust collector must provide 25 cubic feet per minute (cfm) or greater of airflow per inch of wheel diameter and have a filter with 99% or greater efficiency and a cyclonic pre-separator or filter-cleaning mechanism.*		
	− When used outdoors.	*None*	*None*
	- When used indoors or in an enclosed area.	*None*	*APF 10*

Equipment / Task	***Engineering & Work Practice***	***Required Respiratory Protection & Minimum Assigned Protection Factors***	
		≤ 4 hours / shift	***> 4 hours / shift***
Heavy equipment and utility vehicles used to abrade or fracture silica containing materials (e.g., hoe-ramming, rock ripping) or used during demolition activities involving silica-containing materials	*Operate equipment from within an enclosed cab.*	*None*	*None*
	When employees outside of the cab are engaged in the task, apply water and/or dust suppressants as necessary to minimize dust emissions.	*None*	*None*
Heavy equipment and utility vehicles for tasks such as grading and excavating but not including: demolishing, abrading, or fracturing silica containing materials	*Apply water and/or dust suppressants as necessary to minimize dust emissions.* *OR*	*None*	*None*
	When the equipment operator is the only employee engaged in the task, operate equipment from within an enclosed cab.	*None*	*None*

DUST CONTROL

Many activities on construction sites generate dust. Some dust is hazardous to workers. Examples of such dust are asbestos, lead, and silica. Some non-hazardous forms of dust can be hazardous to persons who have compromised immune systems, such as persons with recent organ transplants, major surgeries, leukemia or aids. Some dust is hazardous to our clients work activities, such as in the high-tech industry. Dependent upon your work environment and work task, dust control may be required.

If you are performing work activities that generate dust, be sure that you have communicated with your supervisor to ensure that your work is not creating a health hazard to yourself and/or others around you. Andersen and some of our clients take dust control very seriously and failure to follow the jobsites procedures can result in disciplinary action.

If you are performing activities within an occupied healthcare facility, you must be familiar with the site Interim Life Safety Measures (ILSM) and Infection Control procedures. If you are not – STOP and contact your supervisor.

- Dry sweeping of surfaces is strongly discouraged. Wet any sweeping material that can become an airborne respiratory hazard, use a vacuum or use a floor sweeping compound.

TRAFFIC CONTROL

Construction sites can often be considered an attractive nuisance – meaning that the public are drawn to them. However, the public is not aware of the hazards construction sites can pose. Therefore, it is important that all traffic control measures and public safety measures meet the applicable standards, be part of regular safety and coordination meetings, and be reviewed as often as the conditions warrant.

- All traffic signs or devices used for protection of the public shall conform to the applicable ANSI standards, the Manual of Uniform Traffic Control Devices for Streets and Highways or other governmental requirements.
- Barricades, cones or similar channeling devices shall be used whenever employees or the public are exposed to traffic or similar hazards.
- Traffic control supervisors shall be trained in the fundamentals of traffic control and training records shall be provided to Andersen's site safety representative.
- Traffic Control Plans shall be submitted to Andersen, the applicable regulatory authority and available for review.
- Only flaggers trained under the MUTCD standards shall be utilized for motor vehicle traffic control in the public right of way.
- Flaggers directing traffic in the public right of way shall use the appropriate class of high visible clothing and a Stop / Slow Paddle as per the MUTCD.
- Low voltage (12 volt) protected lights shall be used to mark fences and barricades and other such encroachments onto public streets or sidewalks when lighting is not adequate during hours of darkness to adequately illuminate any encroachment.
- Any covered sidewalks shall be equipped with permanent lights to provide sufficient illumination for safe use by the public day or night.
- Public walkways and roadways shall be kept clean and free of all recognized hazards and maintained for the safe and unobstructed movement of pedestrians and vehicular traffic.
- Where sidewalks or other normal walkways for pedestrians are blocked, protected pedestrian pathways shall be provided around the blocked area to protect pedestrians from traffic and other hazards.
- The ANSI *A10.34* standard for public safety shall be used as a reference guide for anyone whose work activities may impact the public.
- *Bike paths and sidewalks shall be considered during the logistics planning phase*.
- *Large equipment, earth-moving and demolition-debris handling vehicles or other large trucks that must cross bike paths and sidewalks to exit the construction site must use a spotter to direct bicyclists and pedestrians.*
- *The backing of equipment and earth-moving or demolition-debris handling vehicles or other large trucks into public roadways will require a MUTCD certified flagger and/or Traffic Control Plan in accordance with the applicable jurisdictions.*

EMERGENCIES AND JOBSITE EVACUATIONS

Each project shall develop an Emergency Action and Excavation Plan specific to and appropriate for the project. The superintendent shall have a grab-n-go kit that is readily accessible that includes the procedures for roll call.

Review all Emergency Action and Evacuation Plan procedures on a weekly basis, during Safety Meetings. Modify these procedures as construction dictates.

In the case of jobsite Emergency:

- Follow all jobsite and/or facility procedures.
- Immediately remove victim from any life-threatening environment.
  - If environment is not life-threatening; notify the proper emergency personnel.
- Hazardous Chemical Emergency: Follow the guidelines on the Safety Data Sheet.
  - All SDS should be readily available in the job trailer or each onsite emplyer's main office or via electronic copy.

Always be familiar with the Site Excavation Plan and any alarms. Know what each alarm means and what to do in the case of alarm activation. If you are informed to evacuate, do so immediately.

In the case of jobsite Evacuation:

- Do NOT stop to turn off tools not currently in your possession.
- Do NOT stop to pick up tools or other materials.
- Assemble at the designated evacuation gathering location.
- Do NOT leave the premises after an evacuation or return to work until cleared by your supervisor.
- DO NOT go back into the building until authorized to do so.

HAZARD COMMUNICATION

The purpose of the Hazard Communications Standard is to protect workers against chemical exposures in the workplace. The law is intended to reduce risks by providing information regarding the potential hazards of chemicals. All chemical products on any worksite must have a Safety Data Sheet (SDS) readily available. If the material is delivered without a SDS, and the company does not already have one on file, the material should not be accepted or the purchasing contractor's project superintendent or project foreman must obtain one from the vendor within 24 hours.

It is each contractor's responsibility to work within the OSHA guidelines. The project superintendent will coordinate all phases of the project and pre-plan for phases requiring the use of chemicals. Andersen will inform other contractors of hazardous processes during safety meetings. It is the responsibility of each contractor to keep Andersen and other contractors informed of any hazardous materials and processes to be used on the project. Any material or work process which may impact employees or create a hazardous atmospheric condition must include air monitoring equipment and/or respiratory protective equipment suitable for the hazard. Documentation of air monitoring must be submitted to Andersen.

Each subcontractor must submit their Safety Data Sheets (either hard copy or electronic) and their written Hazard Communication Plan to Andersen. Each subcontractor shall maintain a current list and copy of the Safety Data Sheets for all applicable products.

Highlights of the Hazard Communication Standard:

1. Employees are informed and trained on the Hazardous Communication Standard.
2. Safety Data Sheets (SDS) are available for all products used in the workplace.
3. All containers are labeled to identify the product.
4. Employees have been furnished with and trained in the use of personal protective equipment (PPE) in the event of an exposure to a potentially hazardous product.

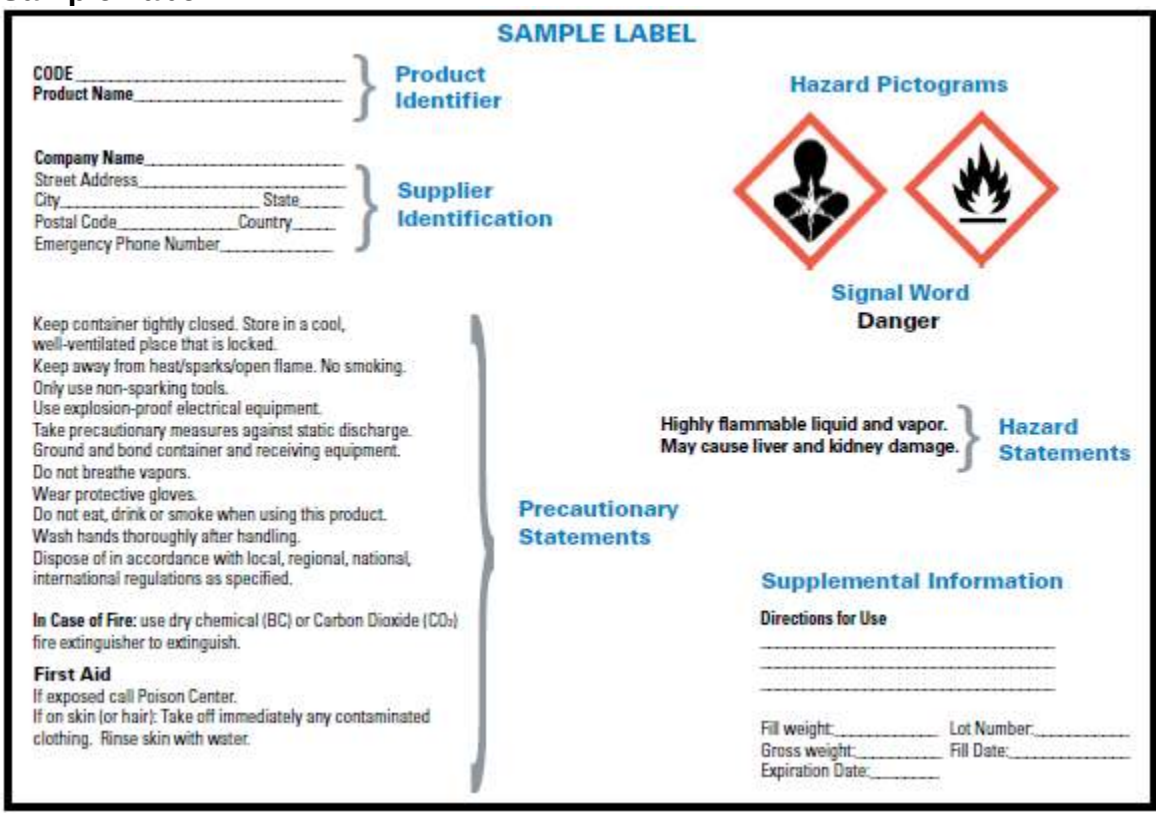
Some projects may require pre-approval of chemicals prior to use on site. *Andersen reserves the right to refuse to allow highly toxic or flammable chemical products to be used on site.*

Container Labels

All chemical containers must be labeled – even if they only contain water. Containers that are commonly used for food and beverage products such as water bottles shall not be secondary containers.

The labels for chemical products must contain the following information: product identifier; signal word; hazard statement(s); precautionary statement(s); and pictograms; and name, address and telephone number of the chemical manufacturer, importer, or other responsible party. The Hazard Pictograms must be a red diamond with a black picture inside.

Sample Label



In addition, Andersen requires the contractor's name, address and telephone number to be added to each and every storage cabinet, bucket or container of their chemical or hazardous products. This includes combustible gas cylinders, gas and diesel containers, propane containers and similar products. Each subcontractor is responsible for the removal of remaining chemical products no later than when the subcontractor demobilizes. Each subcontractor will be responsible for 150% of the disposal cost of remaining chemical products.

HCS Pictograms and Hazards

Health Hazard • Carcinogen • Mutagenicity • Reproductive Toxicity • Respiratory Sensitizer • Target Organ Toxicity • Aspiration Toxicity	**Flame** • Flammables • Pyrophorics • Self-Heating • Emits Flammable Gas • Self-Reactives • Organic Peroxides	**Exclamation Mark** • Irritant (skin and eye) • Skin Sensitizer • Acute Toxicity (harmful) • Narcotic Effects • Respiratory Tract Irritant • Hazardous to Ozone Layer (Non-Mandatory)
Gas Cylinder • Gases Under Pressure	**Corrosion** • Skin Corrosion/ Burns • Eye Damage • Corrosive to Metals	**Exploding Bomb** • Explosives • Self-Reactives • Organic Peroxides
Flame Over Circle • Oxidizers	**Environment** (Non-Mandatory) • Aquatic Toxicity	**Skull and Crossbones** • Acute Toxicity (fatal or toxic)

HAZARDOUS MATERIALS & WASTE

Hazardous Materials are substances that may cause personal injury, illness, or a threat to the public or environment during handling, use, discharge or disposal. Proper EPA guidelines must be followed regarding the disposal and storage of hazardous materials.

LEAVING USED AND UNUSED HAZARDOUS MATERIALS ON ANDERSEN'S PROJECTS IS NOT ALLOWED.

- Leave the original label on all containers.
- Store hazardous materials only in approved areas.
- Always use proper protective clothing and equipment.
- Know what chemicals you are working with and the proper procedures to follow.
- Only bring on site the amount of chemicals needed for the task at hand.
- Ensure that all secondary containers are labeled.
- For help regarding the disposal or transportation of hazardous materials, contact the appropriate regulatory agency. (DEQ, EPA or local city and county authorities).
- **DO NOT** dispose of any materials in sewers or on the ground.
- **DO NOT** dispose of used containers in the trash bins unless authorized by the Project Superintendent.
- **DO NOT** clean up unknown chemical spills; contain, barricade and notify your foreman.
- **REPORT** all spills to your foreman and/or the project superintendent.
- **REPORT** all hazardous material spills to your company's main office for proper reporting purposes.

Some Materials that are Considered Hazardous:

- Epoxy Resins
- Glues, Caulks and Adhesives
- Paints and Paint Thinners
- Acetone
- Asphalt, Tar, Sealants and Coatings
- Lead
- Landscaping pesticides and weed killers
- Diesel Fuel, Gasoline, Oils, Grease, Propane
- Hydrogen Peroxide
- Some concrete cures and sealants

- All chemical products must be stored properly. *Take note of reactivity, combustibility, flammability, and compatibility of each item in storage. Only store products with like compatible products.* Refer to the SDS for storage criteria.

- All epoxy materials can only be installed with approved safety measures. It is important to communicate to other trades whenever epoxies or other products that can cause sensitizations are to be used on the jobsites.

WASTE & RECYCLING

Most jobsites will have a Waste and Recycling Plan. All jobsites are encouraged to recycle and ensure universal wastes are handled in a responsible manner that is in compliance with local waste guidelines or regulations.

When working on an occupied campus review the host employer's recycling and disposal procedures.

Universal or hazardous waste disposal will require a manifest. Each manifest will require a "Generator's" name as the owner of the waste. The Generator will be the facility owner.

As such, each subcontractor is responsible for properly disposing of any hazardous waste, spent or unused product in accordance with their company policy and the local regulations. For more information contact the local jurisdiction.

Light Bulb Disposal

Fluorescent lamps as well as high-intensity discharge lamps – including mercury vapor, high-pressure sodium and metal halide lamps can contain levels of mercury and lead that make them hazardous waste when disposed.

Do not dispose of these lamps in construction dumpsters. They must be placed in a specific container and disposed of at a facility that handles Universal Waste in accordance with the local jurisdiction.

Handlers of waste lamps managed under the universal waste rule must:
1. Manage lamps in a way that prevents releases of the waste to the environment;
2. Place lamps in containers such as cardboard boxes or fiber drums, which are adequate to prevent breakage;
3. Keep containers closed;
4. Label each container with the words “Universal Waste – Lamps,” “Waste Lamps” or “Used Lamps”;
5. Immediately clean up broken or damaged lamps; and
6. Store broken lamps in a closed, structurally sound container.

Universal Waste Battery Management

A handler of universal waste batteries must manage them in a way that prevents the release of any waste or component of the waste to the environment.

Any battery that shows evidence of leaking must be contained in a container that is closed, structurally sound and compatible with the contents of the battery.

Universal waste batteries must be disposed of at universal waste facilities.

Containers of waste batteries must be clearly labeled or marked with the following: Universal or waste batteries.

Batteries must not be accumulated on one site for more than 1 year.

Mercury Containing Equipment

Mercury containing equipment such as thermostats, mercury switches, pressure relief valves, manometers can contain levels of mercury that make them hazardous when disposed. These devices may be handled and disposed of as universal waste.

Designated containers must be utilized for the mercury containing equipment and properly labeled as; "mercury-containing equipment." Appropriate containers should be well-sealed, leak-proof, heavy plastic and stored in an area with low risk of fire. Do not use aluminum containers.

The waste must not be accumulated for more than one year and must be disposed of at a facility that is authorized for universal waste.

Resources for more information on Waste & Recycling or other hazardous waste substances:

http://www.deq.state.or.us/pubs/factsheets.htm#UW
http://www.ecy.wa.gov/
http://www.deq.idaho.gov/
http://www.epa.gov

CONSTRUCTION SAFETY RESOURCES

There are many online safety resources available today and many can be found in multiple languages. The resources found below provide regulatory resources, training resources, and information on the various types of PPE.

General Construction Resources
http://www.cdc.gov/niosh/construction/
http://www.elcosh.org/index.php
http://www.cpwr.com/

OSHA Websites

http://www.orosha.org	Oregon OSHA
http://www.lni.wa.gov	Washington Labor & Industries
http://www.osha.gov	Federal OSHA

Fall Protection
http://stopconstructionfalls.com/

http://www.capitalsafety.com	DBI Protecta
http://www.Guardianfall.com	Guardian Fall Protection
http://www.millerfallprotection.com	Miller Fall Protection

Personal Protective Equipment Resources
http://www.honeywellsafety.com
http://solutions.3m.com/wps/portal/3M/en-US/PPESafetySolutions/PPESafety/
http://www.ansellpro.com
http://www.bestglove.com
http://www.howardleight.com

DISCIPLINARY POLICY

The following Disciplinary Policy shall apply to all Andersen Construction, Pacific Data Communication, and ASI Structures Employees. All other Subcontractors and Sub-Tiers shall be subject to the Safety Disciplinary Policy attached to the Subcontractor Subcontract Agreement as Exhibit C.

Andersen Construction, Pacific Data Communication, and ASI Structures Employees (collectively referred to in this Disciplinary Policy as "Employee") are required to follow Andersen's Policies, Safety Rules, Owner imposed safety guidelines, and all applicable Federal and State OSHA rules and regulations as well as additional rules, regulations and consensus standards such as NFPA standards, NEC standards, and other best-known practices.

If any Employee: (a) is found to be non-compliant with any project-specific safety requirement or fails to implement measures to ensure worker or public safety; or (b) disregards laws, ordinances, rules, regulations or orders of any public authority having jurisdiction; or (c) violates any Company policy or standard of conduct, the Employee will be subject to disciplinary action. Dependent upon the severity or frequency of the violation, disciplinary action may involve any or all of the following:

- **Verbal Warning**
- **Written Warning**
- **Suspension from the Project and Any Other Andersen Project**
- **Termination**

Repeat Warnings may result in escalating consequences. Willful disregard for serious hazards will result in immediate termination. If at any time you are unsure of safety conditions or procedures, stop immediately and contact your direct supervisor.

High Hazard Safety Violations

The following type of violations will result in an immediate work stoppage and/or suspension pending an incident review. The purpose of the incident review is to uncover the facts related to the reason for the violation and ensure worker knowledge. Any disciplinary action will be determined following the incident review.

- Fall protection violations
- Electrical violations that fall under the "Focus Four" category
- Struck by hazards
- Caught-in / Crush by hazards
- Other serious hazards that expose workers to potential serious injury or death.

NOTE: If a supervisor knowingly places an individual at risk for injury, serious or other, the supervisor shall be subject to disciplinary action up to and including termination. If a supervisor continues to fail to properly supervise workers to ensure worker safety, the supervisor may be removed from the project.

For a complete copy of Andersen's Safety Disciplinary Policy, contact the Corporate Safety Office.

Andersen Construction
EXHIBIT B: ANTI-HARASSMENT POLICY

Revision 2018

Andersen Construction provides equal employment opportunities to all employees and applicants for employment without regard to race, color, religion, sex, national origin, age, disability, or status as a Vietnam-era or special disabled veteran in accordance with applicable federal laws. In addition, Andersen Construction complies with applicable state and local laws governing nondiscrimination in employment in every location in which Andersen Construction has facilities and/or jobsites. This policy applies to all terms and conditions of employment, including, but not limited to, hiring, placement, promotion, termination, layoff, recall, and transfer, leaves of absence, compensation, and training.

Andersen Construction expressly prohibits any form of unlawful employee harassment based on race, color, religion, sex, national origin, age, and disability, status as Vietnam-era or special disabled veteran, or status in any group protected by state or local law. Improper interference with the ability of Andersen Construction's employees to perform their expected job duty is not tolerated.

With respect to sexual harassment, Andersen Construction prohibits the following:

1. Unwelcome sexual advances, requests for sexual favors, and all other verbal or physical conduct of a sexual or otherwise offensive nature, especially where:
    1.1. Submission to such conduct is made either explicitly or implicitly or term or condition of employment;
    1.2. Submission to or rejection of such conduct is used as the basis for decisions affecting an individual's employment; or
    1.3. Such conduct has the purpose or effect of creating an intimidating, hostile, or offensive working environment.
2. Offensive comments, jokes, innuendoes, and other sexually oriented statements.

With respect to other forms of harassment, Andersen Construction prohibits offensive comments, jokes, innuendoes and other forms of harassment and/or discrimination on the basis of race, color, religion, sex, national origin, age, disability, or status as a Vietnam-era or special disabled veteran or any other protected class.

Complaint Procedure

Each member of management is responsible for creating an atmosphere free of discrimination and harassment, sexual or otherwise. Further, employees are responsible for respecting the rights of their coworkers.

Any employee who feels that he/she has been harassed or discriminated against based on his/her sex, race, color, age, national origin, disability, or on any other protected class status, or believes that he/she may have been treated in an unlawful, discriminatory manner, is strongly encouraged to promptly report the incident(s) or concern(s) to his/her supervisor, or any of the company EEO Coordinators. The matter will be investigated and appropriate action will be taken. If an employee believes it would be inappropriate, or is uncomfortable discussing the matter with his/her supervisor, or if the employee feels that it is the supervisor responsible for the harassing or discriminatory behavior, the employee may bypass his/her supervisor and report the matter directly to the head of the department or jobsite, or to one of the EEO Coordinators, who will undertake the investigation.

The complaint will be kept confidential to the maximum extent possible. Andersen Construction has a program in place to investigate such complaints so that appropriate remedial action (if needed) can be taken to improve the situation. Remember, the only way we can help make things better is to be made aware of any deficiencies or problems. To briefly reiterate the steps to file a complaint:

1. The employee should take up the concern with his/her supervisor or manager immediately. If the employee feels his/her supervisor is responsible for the discriminatory or harassing behavior or actions, or is uncomfortable discussing such with his/her supervisor, the employee may go directly to one of the EEO Coordinators. In any situation where an employee feels that he/she is being harassed in any manner, the employee may go directly to one of the EEO Coordinators.

2. If the supervisor is unable to resolve the issue or the employee feels that the behavior or actions continues, the employee should take up the concern with one of the EEO Coordinators. The EEO Coordinators are empowered to investigate and resolve the issue.

If Andersen construction determines that an employee is guilty of harassing another individual, appropriate disciplinary action will be taken against the offending employee, up to and including termination of employment.

Andersen Construction prohibits any form of retaliation against any employee for filing a bona fide complaint under this policy or for assisting in a complaint investigation. However, if after investigating any complaint of harassment or unlawful discrimination, Andersen Construction determines that the complaint is not bona fide or that an employee has provided false information regarding the complaint, disciplinary action may be taken against the individual who filed the complaint or who gave the false information.

Employees seeking further clarification regarding harassment, his/her rights, or this policy are encouraged to contact the EEO Coordinator(s).

Kimberly Gamble, EEO Coordinator
Bill Eckhardt, EEO Coordinator
PO Box 6712
Portland, OR 97228
(503) 283-6712

Andersen Construction
EXHIBIT C: SAFETY DISCIPLINARY POLICY

Revision 2018

Andersen Construction employees, subcontractors, sub-subcontractors and their employees are required to follow Andersen Construction's Company Policies, Safety Rules, Owner imposed safety guidelines, and all applicable Federal and State OSHA rules and regulations as well as additional rules, regulations and consensus standards such as NFPA standards, NEC standards, and other best known practices.

If any Subcontractor and/or its sub-tier contractors: (a) is found to be non-compliant with any project-specific safety requirement or fails to implement measures to ensure worker or public safety; or (b) disregards laws, ordinances, rules, regulations or orders of any public authority having jurisdiction; the Contractor may:

- Stop work and direct immediate correction; and/or
- Issue written notice to the Subcontractor requiring a written cure/recovery plan detailing how Subcontractor intends to correct the contractual default(s) ("Notice to Cure").

If a Notice to Cure is issued under this Safety Disciplinary Policy, and Subcontractor fails within **twenty-four (24) hours** after receipt thereof to submit a written Corrective Action Plan, and commence and continue satisfactory correction of the contractual defaults with diligence and promptness, then the Contractor, without further notice or prejudice to any rights or remedies, shall exercise any or all of the following remedies:

- Temporarily or permanently remove any individual from the project;
- Require re-training for any individual(s), crew and/or supervisor(s);
- Issue a $1000 fine per occurrence;
- Require additional full-time supervision and/or safety representative hired by or approved by Contractor at Subcontractor's expense;
- Require the removal of any unsafe condition; and/or
- Terminate all or part of the Agreement.

Repeat warnings may result in escalating consequences. Willful disregard for serious hazards may result in immediate termination. Subcontractor shall be solely responsible for (1) all costs and expenses paid or incurred in the implementation of the Corrective Action Plan, including costs incurred by the stoppage of Work; and (2) all sub-tier subcontractors and employees.

High Hazard Safety Violations

The following type of violations will result in an immediate work stoppage and/or suspension pending an incident review. The purpose of the incident review is to uncover the facts related to the reason for the violation and ensure worker knowledge. Disciplinary action, if any, will be determined following the incident review.

- Fall protection violations
- Electrical violations that fall under the "Focus Four" category
- Struck by hazards
- Caught-in / Crush by hazards
- Other serious hazards that expose workers to potential serious injury or death.

NOTE: If a supervisor knowingly places an individual at risk for injury, serious or other, the supervisor shall be subject to disciplinary action up to and including removal from the Andersen Job Site.

For a complete copy of Andersen Construction's Safety Disciplinary Policy, contact the Corporate Safety Office.

All Subcontractors/Vendors must adhere to the following billing procedures in order to be paid. Make copies of the proper forms for your use each month. Please note that any payment application received that does not adhere to all of the below listed requirements will be held until in compliance and may not be processed within the month submitted. Also note that payments cannot be made on any subcontract that is not yet fully executed.

1. Progress Billings must be submitted on or before the 20th of each month, projected through the end of the billing period. Billings shall be submitted electronically to subpayables@andersen-const.com and one to the Project Manager for your job via email. The project number, project name, company name, and billing month shall be referenced in the subject of the email. Please do not send hard copies.

2. The Application for Payment form must filled out completely including vendor number, job number and contract or PA number (these can be located on your subcontract agreement signature page).

3. The Subcontractor Breakdown Sheet or an equivalent Schedule of Values (SOV) sheet must accompany each billing.

4. A Lien and Claim Waiver must accompany each Progress Billing. These should be filled out for the Net Amount Due, be signed and notarized.

5. A Final Waiver must accompany Final Billing for retention only.

JOINT CHECK PROCEDURE

1. If your company is on Joint Check Status for one or all projects, the "List of Subcontractors, Suppliers & Unions" must be filled out and submitted with EVERY monthly pay application and is due at the same time as the pay application.

2. A "2nd Tier Subcontractor's/Supplier's Waiver of Lien and Claim" must be filled out by each sub/supplier on the list noted in item 1 above. If they have been paid in full, they fill out the "Unconditional" portion and no joint check will be cut. If they have not been paid, they fill out the "Conditional" and a joint check will be cut at the same time that the pay application is processed for payment.

3. If unions are applicable, a signed letter of good standing must be provided from the applicable union in lieu of a Supplier Waiver.

APPLICATION FOR PAYMENT

VENDOR #:
SUBCONTRACTOR NAME:

APPLICATION #:
INVOICE #:

PROJECT:

PERIOD TO:

CONTRACT OR PA #:

JOB #:

1. ORIGINAL CONTRACT AMOUNT:	**$**
2. ISSUED CHANGE ORDER TOTAL: THROUGH CHANGE ORDER #: _____	**$** 0.00
3. CONTRACT AMOUNT (LINES 1+2)	**$** 0.00
4. TOTAL COMPLETED TO DATE BY SUBCONTRACTOR:	**$**
5. LESS GROSS AMOUNT OF PRIOR APPLICATIONS BY SUBCONTRACTOR: (LINE 4 FROM PREVIOUS APP)	**$**
6. GROSS AMOUNT CURRENTLY DUE: (LINE 4 - 5)	**$** 0.00
7. LESS CURRENT RETENTION .05 % (Note 5% must be entered as 0.05)	**$** 0.00
8. NET AMOUNT DUE: (LINE 6 - 7) (Lien Release Amt)	**$** 0.00

PLEASE NOTE THE FOLLOWING:

****

*This pay application is due on the 20th of the month or per your specific contract terms.
*Any pay application received after the due date will be processed in the following month.
*This form must be accompanied by a lien release for the Net Amount Due. No payments will be made without a correct, signed and notarized lien release.
*If you are on Joint Check Status. This application must include the List of Suppliers and a Supplier Waiver for each.

Checks will not be issued until the above requirements are met.

CONTINUATION SHEET

PAGE OF PAGES

Subcontractor instructions

Provide Schedule of Values for work included in Base contract, broken down into multiple lines

Add lines for Change Orders below Base contract.

APPLICATION NO:

APPLICATION DATE:

PERIOD TO:

ARCHITECT'S PROJECT NO:

A	B	C	D	E	F	G		H	I
ITEM NO.	DESCRIPTION OF WORK	SCHEDULED VALUE	WORK COMPLETED FROM PREVIOUS APPLICATION	WORK COMPLETED THIS PERIOD	MATERIALS PRESENTLY STORED (NOT IN D OR E)	TOTAL COMPLETED AND STORED TO DATE (D+E+F)	% (G ÷ C)	BALANCE TO FINISH (C - G)	RETAINAGE (IF VARIABLE RATE)
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
						$0.00	0.00%	$0.00	
	GRAND TOTALS	$0.00	$0.00	$0.00	$0.00	$0.00	0.00%	$0.00	

Users may obtain validation of this document by requesting of the license a completed AIA Document D401 - Certification of Document's Authenticity

AIA DOCUMENT G703 · CONTINUATION SHEET FOR G702 · 1992 EDITION · AIA · ©1992
THE AMERICAN INSTITUTE OF ARCHITECTS, 1735 NEW YORK AVENUE, N.W. WASHINGTON, D.C. 20006-5232

PDF Format Fix 3.16.18

LIEN/CLAIM WAIVER

From:_____
(Name of Firm Giving Release)

_____
(Business Address)

_____
(City, State, Zip Code)

Contact Person:_____

Project: _____
(Project Name)

_____
(Project Address)

_____
(City, State, Zip Code)

Project Manager: _____

CONDITIONAL RELEASE

The undersigned does hereby acknowledge that upon receipt by the undersigned of a check from Andersen Construction in the sum of (line 8 from pay application) 0.00 and when the check has been properly endorsed and has been paid by the bank upon which it was drawn, this document shall become effective to release any and all claims and rights of lien which the undersigned has on the above referenced job. This release covers a progress payment for labor, services, equipment, materials furnished and/or claims through (period to date from pay application)_____only and does not cover any retention or items furnished after that date. Before any recipient of this Document relies on it, said party should verify evidence of payment to the undersigned.

The undersigned also certifies that, except for those amounts listed below, payment has been made in full to all Subcontractors and Suppliers for all labor, materials, equipment, and/or services related to the above referenced project, and that there are no outstanding claims or demands.

UNCONDITIONAL RELEASE

Additionally, the undersigned does hereby acknowledge that the undersigned has been paid and has received progress payments in the sum of $_____for labor, services, equipment or materials furnished to the above referenced job and does hereby release any and all claims and rights of lien which the undersigned has on the above referenced job. This release covers all payment for labor services, equipment, materials furnished and/or claims to the above referenced job through (date) _____only and does not cover any retention or items furnished after that date.

NOTICE: THIS PORTION WAIVES RIGHTS UNCONDITIONALLY AND STATES THAT YOU HAVE BEEN PAID FOR GIVING UP THOSE RIGHTS. THIS DOCUMENT IS ENFORCEABLE AGAINST YOU IF YOU SIGN IT, EVEN IF YOU HAVE NOT BEEN PAID. ONLY ENTER THE TOTAL AMOUNT THAT YOU HAVE ACTUALLY RECEIVED.

I / WE HEREBY CERTIFY THAT THE ABOVE IS A TRUE AND CORRECT STATEMENT, AND THAT ALL WORK HAS BEEN PERFORMED FOR THE STATED PROJECT AT THE STATED AD DRESS.

Signature:_____
(Authorized Representative)

Title:_____

Dated this_____, 20___ at_____
(City, State)

State of_____, County of _____
This instrument was acknowledged before me on this_
_____day of_____, 20_____
by_____as_____
of_____

_____
Notary Public State of _____

My Commission Expires: _____

[List any outstanding charges or claims]

Description	Amount

Job#_____
Subcontract#_____

SUBCONTRACTOR WAIVER AND RELEASE UPON FINAL PAYMENT

Upon receipt of final payment from Andersen Construction Company in the sum of $_____, and when the final payment has been paid by the bank upon which it is drawn, the undersigned waives all claims and demands of any nature whatsoever which the undersigned has including lien rights and bond claim rights, arising out of or relating to the undersigned's contract with Andersen and/or all work performed by the undersigned for the project commonly known as_____, located at _____, and releases the owner, the property, Andersen, and Andersen's surety, insurer, affiliates, general partners, lenders, subsidiaries, successors and assignments.

In consideration of and for the purpose of inducing Andersen to make final payment, the undersigned represents, warrants and agrees that:

1) All sums due or to become due, and all debts, accounts, damages, obligations, claims and demands of every nature and kind whatsoever, in any manner arising out of or relating to labor performed or materials, supplies, equipment or work furnished in connection with, or incidental to, the project have been paid and satisfied;

2) There are not existing or unsettled claims for injuries to, or death of, any persons, or damage to or destruction of property in any manner arising out of or relating to the undersigned's work;

3) The undersigned has no other or further claims or rights of lien of any kind, or nature, with respect to the project, or any claims or rights against owner, Andersen, Andersen's surety, or their respective successors, assigns, subsidiaries, affiliates, lenders, general partners and agents; and

4) Nothing in this Final Waiver is intended, nor shall it be construed or deemed, to result in release of the undersigned's warranty obligations and any other obligations, which may exist under its contract with Andersen.

Signature:_____
(Authorized Corp. Officer/Partner/Owner)

State of _____, County of _____
This instrument was acknowledged before me on this _____
Day of _____, 20_____ by
_____ as _____
of _____
(company name)

Title _____
Dated this _____ day of _____,
20_____ at _____
(City, State)

Signed _____
Notary Public for the State of _____
My Commission Expires: _____

LIST OF 2nd TIER SUBCONTRACTORS, SUPPLIERS & UNIONS

TO: Andersen Construction Company
PO BOX 6712
Portland, Oregon 97228
(herein "Andersen")

FROM: _____

_____

_____

PROJECT: _____

The Subcontractor entered into an Agreement with Andersen as part of the project above referenced. The following list includes the names of all parties who have been contracted with by the Subcontractor to furnish or are expected to furnish labor, materials, equipment and/or services for the Work and the amounts contracted for, or expected to become due through the period of the attached payment application.
List below all 2nd Tier Subcontractors, Suppliers and Unions (if applicable) with values over $500.

Name, Phone, Contact	Description	Price
		$
		$
		$
		$
		$
		$
	Self-Performed Work	$
	Total of suppliers under $500	$
	Grand Total (must equal line 6 from payment application)	$ 0.00

[Attach Separate Sheet if Necessary]

The undersigned, for the subcontractor further states and warrants that there are no other contracts for said work outstanding; that there are no others expected to be entered into; and that he/she will advise Andersen in writing of any additions or changes to this list within five (5) days of such occurrence.

The undersigned acknowledges that this information is provided so that Andersen may exercise its rights pursuant to the Agreement, and that Andersen, in making payments relating to the work, is relying upon the information presented herein.

Authorized Signature: _____ Date: _____
Name and Title: _____

2nd TIER SUBCONTRACTOR'S/SUPPLIER'S WAIVER OF LIEN AND CLAIM

To: Andersen Construction Company
PO Box 6712
Portland, OR 97228

Project: _____
Address: _____
_____
Project #: _____

Subcontractor: _____
Address: _____
_____

The Subcontractor entered into an agreement with Andersen as part of the Project above referenced. The 2nd Tier Subcontractor / Supplier has provided to the Subcontractor as part of the Project certain labor, materials, equipment and / or services. The Subcontractor and 2nd Tier Subcontractor / Supplier hereby certify:

☐ **CONDITIONAL RELEASE**: (Joint check required)
There is due and owing to the 2nd Tier Subcontractor / Supplier $_____ for labor, materials, equipment and / or services provided on the Project above referenced through _____, 20_____. Conditioned upon receipt by the 2nd Tier Subcontractor of a check made payable to the 2nd Tier Subcontractor / Supplier in the said amount, and when the check has been endorsed and has cleared the bank on which it is drawn, this document shall constitute a release by the 2nd Tier Subcontractor / Supplier of Andersen, its surety, successors and assigns, the Owner, the Project and the real property upon which it is situated from any claim or demand for work performed to said date, and shall also constitute a waiver by the 2nd Tier Subcontractor / Supplier of any claim or claim of lien or encumbrance upon the Project or any bond posted concerning the Project as of said date.

☐ **UNCONDITIONAL RELEASE**: (No joint check required)
There are no amounts due and owing to the 2nd Tier Subcontractor / Supplier for labor, materials, equipment and / or services provided on the Project above referenced through_____, 20____. The 2nd Tier Subcontractor / Supplier hereby releases Andersen, it surety, successors and assigns, the Owner, the Project and the real property upon which it is situated from any claim or demand for work performed to said date, and hereby further waives any claim or claim of lien or encumbrance upon the Project or any bond posted concerning the Project as of said date.

The undersigned warrant their authority to execute this Waiver of Lien and Claim.

Subcontractor:

_____

By: _____ Date: _____

Title: _____

2nd Tier Subcontractor / Supplier

_____

By: _____ Date: _____

Title: _____

Andersen Construction
EXHIBIT C: SAFETY DISCIPLINARY POLICY

Revision 2018

Andersen Construction employees, subcontractors, sub-subcontractors and their employees are required to follow Andersen Construction's Company Policies, Safety Rules, Owner imposed safety guidelines, and all applicable Federal and State OSHA rules and regulations as well as additional rules, regulations and consensus standards such as NFPA standards, NEC standards, and other best known practices.

If any Subcontractor and/or its sub-tier contractors: (a) is found to be non-compliant with any project-specific safety requirement or fails to implement measures to ensure worker or public safety; or (b) disregards laws, ordinances, rules, regulations or orders of any public authority having jurisdiction; the Contractor may:

- Stop work and direct immediate correction; and/or
- Issue written notice to the Subcontractor requiring a written cure/recovery plan detailing how Subcontractor intends to correct the contractual default(s) ("Notice to Cure").

If a Notice to Cure is issued under this Safety Disciplinary Policy, and Subcontractor fails within **twenty-four (24) hours** after receipt thereof to submit a written Corrective Action Plan, and commence and continue satisfactory correction of the contractual defaults with diligence and promptness, then the Contractor, without further notice or prejudice to any rights or remedies, shall exercise any or all of the following remedies:

- Temporarily or permanently remove any individual from the project;
- Require re-training for any individual(s), crew and/or supervisor(s);
- Issue a $1000 fine per occurrence;
- Require additional full-time supervision and/or safety representative hired by or approved by Contractor at Subcontractor's expense;
- Require the removal of any unsafe condition; and/or
- Terminate all or part of the Agreement.

Repeat warnings may result in escalating consequences. Willful disregard for serious hazards may result in immediate termination. Subcontractor shall be solely responsible for (1) all costs and expenses paid or incurred in the implementation of the Corrective Action Plan, including costs incurred by the stoppage of Work; and (2) all sub-tier subcontractors and employees.

High Hazard Safety Violations

The following type of violations will result in an immediate work stoppage and/or suspension pending an incident review. The purpose of the incident review is to uncover the facts related to the reason for the violation and ensure worker knowledge. Disciplinary action, if any, will be determined following the incident review.

- Fall protection violations
- Electrical violations that fall under the "Focus Four" category
- Struck by hazards
- Caught-in / Crush by hazards
- Other serious hazards that expose workers to potential serious injury or death.

NOTE: If a supervisor knowingly places an individual at risk for injury, serious or other, the supervisor shall be subject to disciplinary action up to and including removal from the Andersen Job Site.

For a complete copy of Andersen Construction's Safety Disciplinary Policy, contact the Corporate Safety Office.

September 6th, 2019

Request for Proposals

Benson High School Modernization

Trade Package 1 –MEP/FP

Due Thursday, October 3rd by 2:00 PM

Andersen Construction is seeking Proposal responses from qualified companies for the scopes of work listed below:

- Trade Package 21-00: Fire Protection-Design Build
- Trade Package 22-00: Plumbing-Design Assist
- Trade Package 23-00: HVAC-Design Assist & Controls-Design Build
- Trade Package 26-00: Electrical & Low Voltage Systems-Design Assist
  Low Voltage specialty systems to be included in Electrical Package:
  - Low Voltage/Data/Telecom-Design Assist
  - Bells & Clocks-Design Assist
  - Security-Design Assist
  - Photovoltaic-Design Build

Project Description:

The Benson Highschool (BHS) modernization is a comprehensive retrofit of the existing BHS facility including 212,084 GSF of renovation and 175,680 GSF of new construction for a total of 387,764 GSF of total scope. The project is targeting LEED silver minimum. The campus includes 10 buildings all of which are 2-3 stories and some of which are a part of the historic register and will have special provisions related to respect for their historic fabric. The campus includes a variety of program spaces including an auditorium, two gymnasiums, a variety of classroom types and administrative functions and a library. The campus also includes Career Technical Education (CTE) teaching environments for disciplines like woodworking, metalsmithing, forging, construction, and automotive among others. Mechanical space is distributed throughout the campus and the majority of the main mechanical equipment is located in basements or rooftops.

Work is scheduled to occur starting in June of 2021 and will be a prevailing wage job with an approximate 34-month construction duration. Please incorporate projected 2021 BOLI wages in your budget. A copy of the 2019 currently BOLI rates are provided for reference below, however all budgeting should be based on projected wage rates applicable at time work occurs (BOLI rates will be established and locked for project in 2021).

https://www.oregon.gov/boli/WHD/PWR/Pages/PWR-Rate-Publications---2019.aspx

RFP Selection Timeline:

September 9th, 2019	RFP Advertisement issued
September 11th, 2019	**Mandatory Pre-Proposal Meeting-3:30pm**
September 16th, 2019	Release of Addendum # 1 (as needed)
September 20th, 2019	Final questions due to Andersen Construction
September 25th, 2019	Release of Addendum # 2 (as needed)
October 3rd, 2019	**RFP Responses due**
October 16th, 2019	Interviews Day 1-Mechanical/Plumbing
October 17th, 2019	Interviews Day 2-Electrical (and additional Mechanical if needed)
October 18th, 2019	Interviews Day 3- Fire Protection (and Electrical con't if needed)
October 25th, 2019	Andersen Recommendations to PPS for Review
November 1st, 2019	PPS Notification to Andersen for Award Approvals
November 4th, 2019	Andersen Notification to Subcontractors of Intent to Award

Note: A notification regarding timeline changes will be issued, if necessary.

Prequalification Information:

All participants must have a completed Prequal prior to Andersen Construction recommending award to your firm. Please refer to Document 6– Subcontractor Prequalification requirements (using Compass).If you are a returning subcontractor/supplier and have not completed a prequalification using Compass; or are a new subcontractor/supplier who has not done business with us in the past.

Document Availability:

Detailed RFP instructions and scoring criteria, along with 100% SD documents and all Andersen RFP Documents are available for downloading through Building Connected, the program from which the RFP was sent.

In addition, documents will be available at many plan centers. Please notify ACCO with your requests for posting at specific plan centers.

Please contact Elizabeth Juhala for an invitation from Building Connected and access to all the documents. ejuhala@andersen-const.com

Contact Information:

Questions should be emailed to Emily Hager and Erin Storlie by September 20th, 2019 for inclusion in Addendum #1. Proposers may also submit questions through Building Connected.

Preconstruction Manager: Erin Storlie – estorlie@andersen-const.com
Regional Estimating Manager: Emily Hager - ehager@andersen-const.com

All proposals will be received through Building Connected. Bidders will be responsible for filling in all blank fields on the online bid form and submitting by the date and time listed herein. All documents requested by the RFP shall be attached (including Budget Breakdown Form), along with any additional information you wish to submit, through Building Connected. If you need help submitting your proposal through Building Connected, please contact Elizabeth Juhala at ejuhala@andersen-const.com.

******Please let us know, either by email or Building Connected, your intent to provide a proposal by 9/12/19 if possible, and note which packages you will be including.***

Health & Safety Funding Allocation
October 2020

	Total Funds	Committed	Spent To Date	Balance	Unalloc Balance
Bond Fund Category: DS001 - Accessibility	**9,200,000**	**6,955,740**	**8,814,541**	**385,459**	**Accessibility**
Project Name: 2017 Bond Program	*22,885*	-	-	*22,885*	*22,885*
Project Name: GROUP 3 (IP 2017)	3,593,412	1,427,372	3,416,856	176,556	
Project Name: Harrison Park - Partial Re-Roof-Bond - 5321 - FY20	45,000	45,000	-	45,000	
Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	4,411,028	4,359,708	4,360,010	51,018	
Project Name: Ockley Green - Partial Re-Roof-Bond - 5322 - FY20	45,000	45,000	-	45,000	
Project Name: Rigler - Health & Safety Improvements-Bond - 5029 - FY19	1,037,675	1,033,659	1,037,675	-	
Project Name: Woodlawn - Partial Re-Roof-Bond - 5323 - FY20	45,000	45,000	-	45,000	
Bond Fund Category: DS002 - Asbestos Remediation	**11,040,000**	**2,610,106**	**4,609,881**	**6,430,119**	**Asbestos**
Project Name: 2017 Bond Program	*5,576,906*	-	-	*5,576,906*	*5,576,906*
Project Name: Beaumont - 2020 Asbestos Abatement-Bond - 5373 - FY20	243,041	220,560	168,800	74,241	
Project Name: Capitol Hill - 2020 Asbestos Abatement-Bond - 5275 - FY20	113,922	109,552	78,020	35,903	
Project Name: Chapman - 2020 Asbestos Abatement-Bond - 5377 - FY20	109,831	103,257	88,380	21,451	
Project Name: GROUP 3 (IP 2017)	66,361	66,361	41,144	25,217	
Project Name: GROUP 4 - ASBESTOS	1,392,403	165,618	1,392,403	-	
Project Name: Harrison Park - Copy Room-Abate Asbestos Tile - 4664 - FY18	10,185	-	10,185	-	
Project Name: Harrison Park - K Classrooms-Abate Asbestos from floor tiles - 4441 - FY18	24,009	-	24,009	-	
Project Name: Hosford - 2020 Asbestos Abatement-Bond - 5363 - FY20	253,168	235,025	73,365	179,803	
Project Name: Hosford - Wood Shop Floor-Asbestos - 4573 - FY18	41,523	-	41,523	-	
Project Name: Jackson - Health & Safety Improvements-Bond - 5030 - FY19	-	-	-	-	
Project Name: Lane - 2020 Asbestos Abatement-Bond - 5361 - FY20	134,159	126,569	86,334	47,825	
Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	658,511	638,502	638,502	20,009	
Project Name: Multiple Sites - Asbestos Bond Projects-2018-19 - 4923 - FY19	1,254,069	-	1,254,069	-	
Project Name: Multiple Sites - Asbestos Bond Projects-2019-20 - 4924 - FY20	100,000	72,411	45,128	54,872	
Project Name: Multiple Sites - Floor Replacement-Bond Compensible - 4565 - FY18	101,044	-	101,044	-	
Project Name: Rigler - 2020 Asbestos Abatement-Bond - 5369 - FY20	232,747	188,041	61,304	171,443	
Project Name: Stephenson - 2020 Asbestos Abatement-Bond - 5362 - FY20	154,289	133,825	51,538	102,751	
Project Name: Vernon - 2020 Asbestos Abatement-Bond - 5374 - FY20	100,005	93,334	73,209	26,796	
Project Name: Vestal - 2020 Asbestos Abatement-Bond - 5367 - FY20	214,550	211,120	181,485	33,065	
Project Name: Woodstock - 2020 Asbestos Abatement-Bond - 5368 - FY20	250,664	245,933	190,827	59,837	
Project Name: Woodstock - Hallway-Abate and replace floor tiles - 4738 - FY18	8,614	-	8,614	-	
Bond Fund Category: DS003 - Fire Sprinkler/Alarms	**19,564,225**	**12,226,403**	**14,801,270**	**4,762,956**	**Fire Sprink/Alarm**
Project Name: 2017 Bond Program	*995,436*	-	-	*995,436*	*995,436*
Project Name: Chapman - Re-Roof - Bond Funded - 4671 - FY18	-	-	-	-	
Project Name: GROUP 2 - Fire Alarm / Sprinkler	4,142,986	1,859,630	3,854,685	288,301	
Project Name: GROUP 3 (IP 2017)	4,361,785	1,089,684	4,342,157	19,628	
Project Name: Jefferson - Fire Sprinkler Upgrades-Bond - 5053 - FY19	1,167,966	1,134,307	1,139,496	28,470	
Project Name: Multiple Sites - Fire Alarm Equipment Purchase - FY15/16/17/18 - X0114	46,523	-	46,523	-	
Project Name: Multiple Sites - Fire Alarm Upgrades-North Group 1 - 5211 - FY20	1,952,500	1,765,412	1,177,166	775,334	
Project Name: Multiple Sites - Fire Alarm Upgrades-North Group 2 - 5212 - FY20	1,955,500	1,820,846	1,306,617	648,883	
Project Name: Multiple Sites - Fire Alarm Upgrades-South Group 3 - 5213 - FY20	1,539,763	1,381,902	734,557	805,206	
Project Name: Multiple Sites - Fire Alarm Upgrades-South Group 4 - 5214 - FY20	1,880,441	1,693,583	842,625	1,037,816	
Project Name: Rigler - Health & Safety Improvements-Bond - 5029 - FY19	1,521,325	1,481,039	1,357,443	163,883	
Bond Fund Category: DS004 - Lead Paint Stabilization	**14,624,624**	**34,155**	**1,568,683**	**13,684,942**	**Lead Paint**
Project Name: 2017 Bond Program	*3,790,587*	-	*34,113*	*3,756,474*	*3,790,587*
Project Name: Multiple Sites - Lead Paint Abatement - BOND	10,000,000	25,542	700,533	9,928,468	
Project Name: Multiple Sites - Lead Paint Abatement - Emergency Declaration - 4284 - FY17	395,243	-	395,243	-	
Project Name: Multiple Sites - Lead Paint Abatement - Fund 423 - 4493 -FY17	438,795	-	438,795	-	
Project Name: Woodstock - Hallway-Abate and replace floor tiles - 4738 - FY18	-	8,614	-	-	

Health & Safety Funding Allocation
October 2020

	Total Funds	Committed	Spent To Date	Balance	Unalloc Balance
Bond Fund Category: DS005 - Radon Mitigation	**1,036,035**	**18,284**	**158,713**	**877,322**	**Radon**
Project Name: 2017 Bond Program	*864,889*	-	-	*864,889*	*864,889*
Project Name: Lent - Radon Mitigation - 4344 - FY17	38,938	-	38,938	-	
Project Name: Marysville - Radon Mitigation-Rms 137-138-139 - 4939 - FY20	21,334	18,284	8,901	12,434	
Project Name: Multiple Sites - Radon Mitigation - 4609 - FY18	110,875	-	110,875	-	
Bond Fund Category: DS006 - Roof Improvements	**52,986,434**	**40,954,190**	**40,488,858**	**12,497,826**	**Roof**
Project Name: 2017 Bond Program	*540,926*	-	-	*540,926*	*540,926*
Project Name: Chapman - Re-Roof - Bond Funded - 4671 - FY18	4,260,654	3,933,164	3,360,154	900,500	
Project Name: GROUP 3 (IP 2017)	10,648,856	5,667,721	10,502,282	146,574	
Project Name: Harrison Park - Partial Re-Roof-Bond - 5321 - FY20	2,987,519	2,551,463	815,767	2,171,752	
Project Name: Hayhurst - SRGP-Bond - 5028 - FY19	1,923,500	1,682,214	1,596,173	327,327	
Project Name: Jackson - Health & Safety Improvements-Bond - 5030 - FY19	6,521,000	6,307,486	3,555,715	2,965,285	
Project Name: Kelly - Partial Re-Roof-Bond - 5319 - FY20	1,904,478	1,583,320	1,278,102	626,376	
Project Name: Lee - Roof Repair - 4497 - FY18	96,750	96,750	97,000	-	
Project Name: Mt Tabor - Partial Re-Roof-Bond - 5320 - FY20	3,515,778	2,970,645	2,830,031	685,747	
Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	3,781,759	3,781,759	3,781,759	-	
Project Name: Multiple Sites - Health & Safety Group 1 Design - 5153 - FY20	919,568	800,509	639,815	279,753	
Project Name: Multiple Sites - Health & Safety Group 2 Design - 5154 - FY20	1,137,400	1,021,781	820,649	316,751	
Project Name: Ockley Green - Partial Re-Roof-Bond - 5322 - FY20	2,150,478	1,841,390	583,027	1,567,451	
Project Name: Rigler - Health & Safety Improvements-Bond - 5029 - FY19	7,258,000	7,118,637	6,598,948	659,052	
Project Name: Sitton - Health & Safety Improvements-Bond - 5027 - FY19	3,468,883	-	3,466,883	2,000	
Project Name: Woodlawn - Partial Re-Roof-Bond - 5323 - FY20	1,870,886	1,597,352	562,553	1,308,332	
Bond Fund Category: DS007 - Security Improvements	**9,322,221**	**7,122,550**	**6,649,494**	**2,672,727**	**Security**
Project Name: 2017 Bond Program	-	-	-	-	-
Project Name: Creative Science - ADA Accommodation-Access Control - 5049 - FY20	12,855	-	12,855	-	
Project Name: Jefferson - Camera-Pull Stations - 4528 - FY17	30,859	-	30,859	-	
Project Name: Multi-2018-4675-Bond-Security-PKG1 FY18-19	2,512,541	1,697,785	1,711,602	800,939	
Project Name: Multi-2018-5025-Bond-Security-PKG2-FY19	2,419,821	1,851,374	1,886,077	533,744	
Project Name: Multi-2018-5026-Bond-Security-PKG3-FY19	4,042,731	3,308,197	2,742,907	1,299,824	
Project Name: Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	303,414	265,194	265,194	38,220	
Bond Fund Category: DS008 - Water	**24,948,682**	**2,822,617**	**2,728,365**	**22,220,316**	**Water**
Project Name: 2017 Bond Program	*16,006,662*	-	-	*16,006,662*	*16,006,662*
Project Name: Multiple Sites - Drinking Fixture Replacement Program-Bid Package 31 - 5301 -	349,125	269,520	194,257	154,868	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 32 - 5397 - FY20	342,136	244,552	-	342,136	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 33 - 5398 - FY20	283,173	257,430	-	283,173	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 34 - 5390 - FY21	354,142	-	-	354,142	
Project Name: Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 35 - 5391 - FY21	355,960	-	-	355,960	
Project Name: Multiple Sites - Lead in Water Repairs - 4517 - FY17	7,120,756	1,992,441	2,475,434	4,645,322	
Project Name: Multiple Sites - Lead in Water-Emergency Response - 4241 - FY16	136,727	58,675	58,675	78,053	
Bond Fund Category: Management Costs	**12,000,000**	**7,901,722**	**7,623,071**	**4,376,929**	
Project Name: 2017 Bond Program	*11,954,000*	*7,873,682*	*7,595,531*	*4,358,469*	
Project Name: Multiple Sites - Day CPM Management Services - 4610 - FY18	-	-	-	-	
Project Name: Lent - SRGP Design - 5194 - FY20	46,000	28,040	27,540	18,460	
Bond Fund Category: OSCIM	**3,277,779**	**-**	**3,277,779**	**-**	**OSCIM**
Project Name: 2017 Bond Program	-	-	-	-	-
Project Name: Sitton - Health & Safety Improvements-Bond - 5027 - FY19	3,277,779	-	3,277,779	-	
Bond Fund Category: H&S Unallocated	**-**	**-**	**-**	**-**	**H&S Unallocated**
Project Name: 2017 Bond Program	-	-	-	-	-
	158,000,000	**80,645,767**	**90,720,654**	**67,908,597**	**27,798,291**

Bond Performance Audit Tracker
Status of Performance Audit Recommendations
October 28, 2020 - Quarterly Report

2016 Bond Performance Audit Recommendations				
Bond Year	#	Abbreviated Recommendation	Response	Status
2012	1	Update monthly project budget projections in timely way and include ROM estimates of potential changes.	Concur	Complete
2012	2a	CM/GC contracts to require proactive participation of CM/GC with architect.	Nonconcur	Complete
2012	2b	Ensure GMPs are executed at contractually proscribed point in design.	Concur with comment	Complete
2012	3	Ensure GMP amendments are consistent with applicable law and policy.	Completed	Complete
2012	4	Consider increases for general conditions work for change orders only when time is extended.	Concur	Complete
2012	5a	Provide a format in e-Builder for processing CM/GC contract changes quickly.	Completed	Complete
2012	5b	Ensure that CM/GC change orders and draw downs receive appropriate approvals.	Completed	Complete
2012	6	Provide more information to evaluation committee to help in scoring proposals.	Completed	Complete
2012	7	Complete any VE, scope reductions, budget increases, etc by end of SD.	Completed	Complete
2012	8a	Modify SOPs to add more specific project contingency ranges at different design stages.	Nonconcur	Complete
2012	8b	Modify SOPs to add more specificity on how program provides project budget oversight.	Nonconcur	Complete
2012	8c	Develop comprehensive and detailed PTMP templates for renovation projects, new construction projects, and IP work.	Concur with comment	Complete
2012	8d	Hold PMs accountable for creating PTMP prior to beginning SD phase (at latest).	Concur with comment	Working
2012	8e	Develop and record lessons learned from completed projects.	Completed	Complete
2012	9	Modify SOPs to add specific guidelines for line item budgeting for master planning.	Nonconcur	Complete
2012	10a	Assess reasons for IP projects bidding over budgets.	Completed	Complete
2012	10b	Start design of IP projects earlier and issue ITB earlier.	Completed	Complete
2012	10c	Add minimum quals for designated systems into bid specs.	Concur	Complete
2012	11a	Provide greater oversight of program during transition period.	Completed	Complete
2012	11b	Update the PMP/SOP, and train/require staff to use it.	Concur with comment	Working
2012	12	Evaluate effectiveness of CM/GC and consider other delivery models.	Completed	Complete
2012	13	Procure CM/GC by beginning or mid-point of schematic design.	Completed	Complete
2012	14	Complete Ed Specs sufficiently ahead of master planning for projects.	Completed	Complete
2012	15	Allow CM/GC to procure subcontractors by competitive quote up to defined dollar limit without prior approval of district.	Completed	Complete

Audit Year	Summary of Recommendations	Percent Completed
2016	**24** Recommendations, **22** completed	**92%** Completed

Status Notes on Recommendations Not Completed

2016	8d	Final PTMPs have been completed for Kellogg, Madison, Lincoln and Benson. OSM has published a Standard Operating Procedure that requires completion of a PTMP before projects can proceed into SD Phase, but is working on how best to ensure compliance.
2016	11b	The PMP/SOPs are reviewed and updated on an annual basis (please see 2017 audit findings for comment on most recent updates). Comprehensive trainings were last provided in 2015. OSM is currently working on an updated PMP and SOPs, and training staff as part of the update process. OSM will be requiring staff to acknowledge receipt and review of the PMP and SOPs as published and on no less than an annual basis.

Bond Performance Audit Tracker
Status of Performance Audit Recommendations
October 28, 2020 - Quarterly Report

2017 Bond Performance Audit Recommendations				
Bond Year	#	Abbreviated Recommendation	Response	Status
2012	1	Utilities for unoccupied sites should be paid for by the contractor.	Concur with comment	Complete
2012	2	Provide contingency in bond program budget for unforeseen scope changes.	Concur with comment	Complete
2012	3a	Do outreach to contractors.	Concur with comment	Complete
2012	3b	Research why contractors don't want to bid on PPS projects.	Concur with comment	Complete
2012	4	Develop a BIM model that works for both OSM and FAM.	Completed	Complete
2012	5	P&C and legal counsel to review all proposed contract changes.	Concur with comment	Complete
2012	6	Reduce profit and overhead percentages for change orders.	Concur with comment	Complete
2012	7a	Additional GMP contingency only allowed for scope increases.	Concur	Complete
2012	7b	Notify contractors of personnel's limits of authority.	Concur	Complete
2012	8	Start projects earlier and allow more time contingency in project schedules.	Concur with comment	Complete
2012	9	Hold CM/GC accountable for GMP. Identify what changes must be covered in the GMP.	Concur with comment	Complete
2012	10	At time of GMP amendment, identify alternates that could be added back later at the same price.	Concur	Complete
2012	11	Audit FHS and RHS CM/GC monthly billings. For GHS, evaluate benefit of monthly audit of billings against a schedule of values vs billings of actual costs.	Concur with comment	Complete
2012	12	Amend Heery contract to reflect levels of financial authority for Heery personnel.	Concur	Complete
2012	13a	Reduce employee turnover.	Concur with comment	Complete
2012	13b	Provide promotional opportunities when vacancies occur.	Concur with comment	Complete
2012	14a	P&C should stop scoring cost of work in CM/GC proposals and only score proposed fees.	Concur	Complete
2012	14b	Review and negotiate profit and overhead rates to ensure they are industry-standard.	Concur	Complete
2012	15	Update the PMP/SOP, and add a template for the PTMP.	Concur	Working

Audit Year	Summary of Recommendations	Percent Completed
2017	**19** Recommendations, **18** completed	**95%** Completed

Status Notes on Recommendations Not Completed

2017	15	Preliminary draft of the October 2019 PMP update has been distributed to operational staff for review. A template for the PTMP was previously provided as part of the PMP; it has now been revised to better address project needs. SOPs are being developed on prioritized basis and rolled out bi-weekly at PM/CM dept meeting.

2018: FHS/RHS Construction Audits Controls Recommendations				
Bond Year	#	Abbreviated Recommendation	Response	Status
2012	1	Require documented review and approval of all agreed upon self-performed work cost and pricing. Where insufficient competitive bidding is available for establishment of self-performed subcontract price: a) obtain independent cost analysis to support self-performed work pricing and negotiate a fair and reasonable price and/or b) price lump-sum work on a not-to-exceed cost reimbursable basis on future projects. Obtain self-performed work subcontracts to better establish self-performed work scope, pricing and payment terms. [FHS #12]	Completed	Complete
2012	2	Require visibility and reconciliation of project management systems and accounting systems of record utilized for project cost accounting and subcontractor payments. [FHS #13]	Concur with comment	Complete
2012	3a	Perform quarterly review of project change order files for application of expected cost analysis and related approval requirements. [FHS #14]	Concur with comment	Working
2012	3b	Add approval controls designed to prevent proceeding with work prior to full vetting of project design along with related budget. Verify architect progress against key milestones to help ensure timely and complete project work scope inclusion in plans. To prevent untimely and expensive owner-directed changes, require further approval controls for work scope modification. [FHS #14]	Completed	Complete
2012	4	To strengthen existing District controls over system information integrity and consistent with good payment application approval control practices, prior to each payment require eBuilder to include monthly secondary review of the reconciliation between District electronic records to Contractor cumulative payment application contract totals, commitments and costs incurred. [FHS #15, RHS #12]	Concur	Complete
2012	5	Require consistent and compliant application of contract rates to deduct change orders. [FHS #16]	Concur	Working
2012	6	On future projects, require contractors to identify and account for changes by contract line item and in compliance with contract requirements. Require maintenance of an allowance log that specifies budget as included under the GMP schedule of values, cost support for proposed uses of allowance amounts, approved allowance amounts used along with approval documentation by project allowance item. [FHS #17, RHS #13]	Concur	Complete
2012	7	Verify application of the contractual requirement for fixed fee calculation. [FHS #18]	Concur	Working
2012	8	For future projects, add approval controls designed to prevent proceeding with work prior to full vetting of project design, along with related budget and to reduce owner-directed changes, where possible. [RHS #10]	Completed	Complete
2012	9	Implement construction program oversight controls to document verification of independent cost analysis performed on self-performed work procurements, when District competitive bidding procedures are not applied. [RHS #11]	Completed	Complete
2012	10	District project management personnel should require visibility, timely access and sign-off on work cost application applied by the Contractor. [RHS #14]	Concur with comment	Complete

Audit Year	Summary of Recommendations	Percent Completed
2018	**11** Recommendations, **8** completed	**73%** Completed

Status Notes on Recommendations Not Completed

2018	3a	OSM is developing a Standard Operating Procedure for internal audits of change order files.
2018	5	This audit observation noted change order mark-ups had not been applied consistently to deductive changes. OSM is reviewing the Standard Operating Procedure for change requests to ensure that this issue is addressed as part of project staff review of change orders.

Status Notes on Recommendations Not Completed

2018	7	The audit observed the potential for fee calculations to become inaccurate over time as change orders are processed. OSM is working on modifying template contract language to require updated fee calculations based upon final cost of the work.

Recommendations Marked as **Complete** Since Last Reporting

2018	6	Allowance-tracking systems implemented in eBuilder after this audit finding address the concerns noted in the report.

Bond Performance Audit Tracker
Status of Performance Audit Recommendations
October 28, 2020 - Quarterly Report

2019 Phase 1 Bond Performance Audit Recommendations				
Bond Year	#	Abbreviated Recommendation	Response	Status
2017	1	Develop and consistently apply a formal cost estimation methodology across projects regardless if developed in-house or by external consultants, including documentation of the reasons for any deviations from the established methodology.	Concur	Complete
2017	2	Compare and analyze cost estimate assumptions and factors with historic practices and other comparable bonds or districts to determine whether adjustments to estimation methodology seem warranted.	Concur	Working
2017	3	Establish a central location to retain final estimates at each project phase (master planning, schematic design, design document, construction documents), including any supporting documentation used to develop each estimate.	Concur	Complete
2017	4	Discuss comparison of cost estimation methodology used with past PPS experiences, current market conditions, and estimates developed by peer districts when presenting cost estimates to the Board and public stakeholders.	Concur	Working
2017	5	Categorize the reasons for variances in project costs, and aggregate those changes to the program-level to provide information on why costs varied from original bond, as well as report this information to the Board and public stakeholders.	Concur	Complete
2017	6	Conduct an analysis to determine to what degree various factors, especially scope changes and changes in construction costs, caused an increase in construction costs for the 2017 Bond projects. This could include comparing assumptions used across various project milestone reports and/or reconciling line items amounts to subcontractor bids.	Concur	Complete
2017	7	Analyze results of variances to make adjustments to future estimation models and methodology as well as to analyze whether changes are needed in the delivery of projects to ensure stronger cost containment.	Concur	Complete
2017	8	Ensure project milestone reports use consistent data across all projects and clearly identify deviations.	Concur	Complete

Audit Year	Summary of Recommendations	Percent Completed
2019 Ph I	**8** Recommendations, **8** completed	**100%** Completed

Recommendations Marked as **Complete** Since Last Reporting

2019 Ph I	2	2020 Bond planning efforts for modernization projects (as seen in the 2020 Conceptual Master Plan projects for Jefferson HS, Wilson HS and Cleveland HS) utilized professional cost estimators for hard costs. These professional cost estimators also provided recommendations for escalation and soft costs. Soft costs were reviewed against the cost estimating methodology already established by OSM, and were reviewed against historic performance. Escalation and soft cost assumptions were reviewed with the Bond Accountability Committee per their revised charter, prior to use for bond planning.
2019 Ph I	4	Regular discussion of cost estimation methodology using past PPS experiences, current market conditions and professional cost estimators took place with the Bond Accountability Committee and Board members as part of 2020 Bond planning efforts.

Bond Performance Audit Tracker
Status of Performance Audit Recommendations
October 28, 2020 - Quarterly Report

2019 Phase 2 Bond Performance Audit Recommendations				
Bond Year	#	Abbreviated Recommendation	Response	Status
2017	1	Develop a written plan for establishing and prioritizing corrective actions needed to address project delivery issues related to change orders, contractor invoices, and other recommendation noted in prior audits of 2012 Bond projects.	Concur	Complete
2017	2	Develop a written plan or strategy for identifying and incorporating additional funding options if future bond funds are not available and regularly communicate and discuss progress with the Board and Bond Accountability Committee	Complete	Complete
2017	3	Ensure cost estimates are fully documented with underlying support and rationale used for soft costs and FF&E - in addition to other cost components - including variations or deviations from stated methodology.	Concur	Working
2017	4	Implement the new cash flow planning process as intended at the start of the Fiscal Year 2019-2020, and update cash flows regularly.	Concur w/ comment	Complete
2017	5	Immediately allocate and concentrate efforts on completing the overdue Fiscal Year 2018-2019 reconciliations between e-Builder construction management system and the PeopleSoft financial system, as well as ensure future reconciliations are regularly performed in a timely manner	Concur	Complete
2017	6	Update and re-issue the PMP, in addition to individual school PTMPs, as well as consider developing quick tools, guides, and checklists to help project teams implement the protocols identified in the PMP and PTMPs.	Concur	Working
2017	7	Formally communicate, clarify and train OSM project teams and individuals involved with project delivery on existing document management protocols including requirements and expectations for usage.	Concur	Working
2017	8	Standardize design deviation logs by identifying consistent information to be maintained for each project and ensure approvals are documented	Concur w/ comment	Complete
2017	9	Establish a tracking mechanism to store proposed changes to Ed Specs and Design Standards in an accessible location	Concur w/ comment	Working
2017	10	Supplement the "Decision Making Hierarchy" process with written guidance on what decisions to bring forward and elevate beyond the project team as well as train project teams on standard practice for value engineering deviations - as well as Ed Spec and Design Standard deviations	Concur w/ comment	Working
2017	11	Better document lessons learned by: categorizing lessons learned log items into separate subcategory section allowing project managers to more easily identify relevant items; and summarizing lessons learned and regularly distribute or discuss items with project teams.	Concur	Working

Audit Year	Summary of Recommendations	Percent Completed
2019 Ph 2	**11** Recommendations, **5** completed	**45%** Completed

Status Notes on Recommendations Not Completed

2019 Ph 2	3	OSM is working on revising its Standard Operating Procedure (SOP) on cost estimating to specifically require written documentation supporting cost estimates, in addition to continuing to direct project management staff in best practices. Once the SOP has been finalized, this recommendation will be marked as complete.
2019 Ph 2	6	Preliminary draft of the October 2019 PMP update has been distributed to operational staff for review. Once this issuance of the PMP has been finalized, this recommendation will be marked as complete. Efforts to develop appropriate tools and guides for staff will continue on an ongoing basis.
2019 Ph 2	7	OSM has ordered and distributed PPS computer equipment for all non-PPS staff and requires that all PPS-related work be performed on PPS equipment utilizing PPS document management systems. A working group of staff and program management was convened to develop revised file naming and document management systems. A draft file naming convention is currently being tested prior to final implementation. Document management is under discussion.
2019 Ph 2	9	Discussions are underway with the PPS teams that manage the Education Specifications and Design Guidelines.
2019 Ph 2	10	This recommendation is under review by the AIT. OSM is developing decision examples and working with project staff to identify inconsistencies or questions that will need to be addressed by the guidance.
2019 Ph 2	11	A working group of staff and program management developed a new collection system that will allow for improved access, filtering and reporting. Project staff are currently testing the system before final implementation.

Recommendations Marked as **Complete** Since Last Reporting

2019 Ph 2	4	OSM has completed implementation of a standardized, monthly, project cash flow planning process using eBuilder, for both the large capital projects as well as the Health & Safety projects. Due to the minimal changes that occur in a month's span, program management cash flow planning has historically been performed on a quarterly basis, and will remain on that timeline.
2019 Ph 2	5	OSM hired an additional financial analyst in 2019. Reconciliations are now consistently completed within 30 days of prior month closing. Outliers found through these reconciliations are addressed in a timely manner.

Bond Performance Audit Tracker
Status of Performance Audit Recommendations
October 28, 2020 - Quarterly Report

2020 Bond Performance Audit Recommendations				
Bond Year	#	Abbreviated Recommendation	Response	Status
2017	1	Provide the Board an analysis discussing implications if voters do not approve the November 2020 Bond on the Benson High School Project, in particular, as well as other 2017 Bond projects, as appropriate. At the minimum, this analysis should provide cash flow projections for the Benson High School project, and deliberate on the effects of a full faith and credit loan option to ensure the Board can make informed decisions going forward.	Nonconcur	Complete
2017	2	Implement plans to ensure project team members have needed access to e-Builder and that key non-PPS employees in critical project roles have computers to access project information.	Completed	Complete
2017	3	Revisit systems and tools used on a go-forward basis for capturing H&S project expenditure and status data to be able to more efficiently generate reliable data to address H&S project status reporting needs to oversight bodies and the public.	Concur with Comment	Working
2017	4	Complete the development of the interactive map tool and ensure the map is supplemented with summary information about the H&S program. At the minimum, the public information should provide common data from each H&S category in a standardized format that provides easy tracking of current budget, schedule, status, and delivery plans in relation to initial Bond plans.	Concur	Working
2017	5	Require and maintain more consistent documentation associated with the review of price proposals or quotes from construction contractors related to change orders through means such as incorporating project team notes, uploading negotiations in email correspondence, or marked-up price proposals, into the e-Builder system to provide evidence of OSM's due diligence in reviewing contractor change order prices.	Concur	Working
2017	6	Prohibit contractors to perform any work for the district until a fully executed contract is in place or a formal written authorization is provided to allow for pre-contract execution work to start.	Concur with Comment	Working
2017	7	Conduct a post-project completion analysis for the Madison and Lincoln High School projects to evaluate benefits and challenges of the CM/GC delivery method overall, as well as specific aspects such as timing of Guarantee Maximum Price (GMP) contract amendments, and make process changes as warranted. The evaluation should consider components suggested by ORS279.103 and provide a comparison of actual project cost against original project estimates, change order number, value and type, as well as descriptions of success and failures during design and construction.	Concur with Comment	Working
2017	8	Memorialize and discuss underlying rationale and decisions related to the timing of GMP negotiations with the Bond Accountability Committee, and present to the Board for future CM/GC GMP contract amendments as appropriate.	Concur with Comment	Working
2017	9	Clarify and incorporate language in CM/GC contracts, as appropriate, related to contractor financial records in accordance with generally accepted accounting principles.	Concur	Working
2017	10	Address inconsistencies between the contract for architect/engineer services and the CM/GC contract for construction services related to the timing of reconciled cost estimates for future projects by ensuring that the same deliverable milestones are included in both contracts.	Concur	Working
2017	11	Evaluate payment terms and conditions for all H&S low-bid lump-sum contracts to ensure consistency between procurement documents, contract language, and actual payment process practices.	Concur	Working

Audit Year	Summary of Recommendations	Percent Completed
2020	**11** Recommendations, **2** completed	**18%** Completed

Status Notes on Recommendations Not Completed

2020	3	This recommendation is under review by the AIT.
2020	4	An interactive map tool has been developed and added to the Bond website. Staff are working on updating existing program information on Bond web pages to ensure that the program status data available to the public for each H&S category is standardized and easily accessible.
2020	5	This recommendation is under review by the AIT.

Status Notes on Recommendations Not Completed

2020	6	This recommendation is under review by the AIT.
2020	7	Post-project analysis of the Madison and Lincoln High School CM/GC contracts is already required by Portland Public Schools Public Contracting Rules for contracts procured through an alternative delivery method, following the requirements of ORS 279C. However, this analysis cannot be completed until after the later of the date of final payment or the date of final completion. As such, this recommendation will not be able to be resolved until 2022 at the earliest for the Madison project and 2024 at the earliest for the Lincoln project.
2020	8	This recommendation is under review by the AIT. GMP timing has already been set for all of the current 2017 Bond CM/GC projects, so this recommendation will not be able to be resolved until a new CM/GC project is undertaken.
2020	9	This recommendation is under review by the AIT.
2020	10	This recommendation is under review by the AIT.
2020	11	This recommendation is under review by the AIT.

Recommendations Marked as **Complete** Since Last Reporting

2020	1	The Board has already made the decision, noted in Board Resolution 5780, that if the November 2020 Bond does not pass, a full faith and credit bond will be used to fund the remainder of the Benson High School project. Cash flow projections for the project were developed and used in discussions with the Board regarding future bond funding and timing needs. If the November 2020 Bond does not pass, these cash flow projections will be used to determine the amount, timing, and repayment plans of a full faith and credit bond.
2020	2	Previously, project consultants and contractors were limited by OSM in how many accounts they could have to access eBuilder. OSM has moved to an unlimited license model with eBuilder and is now allowing consultants, contractors and their subcontractors unlimited account access. OSM has also purchased PPS computers for all full-time, contracted staff to allow for easier access to PPS network drives.

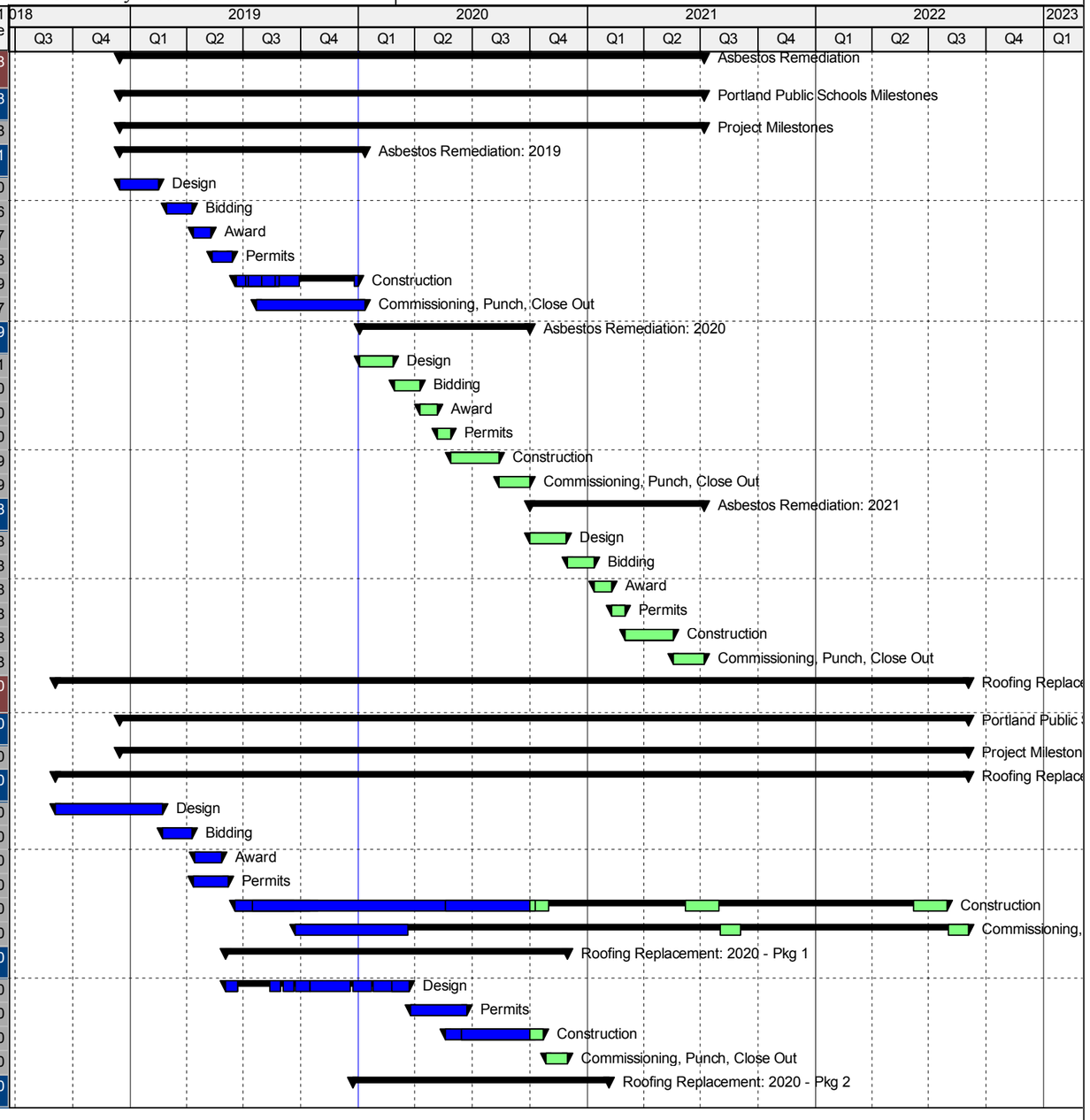
Portland Public Schools (PPS)

Master Planning Schedule

PPS - H+S BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL1 Finish	Variance - BL1 Finish Date
Asbestos Remediation		667	15-Dec-18 A	06-Jul-21	27-May-21	-28
Portland Public Schools Milestones		652	15-Dec-18 A	06-Jul-21	27-May-21	-28
Project Milestones		652	15-Dec-18 A	06-Jul-21	27-May-21	-28
Asbestos Remediation: 2019		280	15-Dec-18 A	12-Jan-20 A	14-Nov-19	-41
Design		41	15-Dec-18 A	15-Feb-19 A	15-Feb-19	0
Bidding		30	28-Feb-19 A	11-Apr-19 A	03-Jun-19	36
Award		20	12-Apr-19 A	10-May-19 A	02-Jul-19	37
Permits		23	13-May-19 A	14-Jun-19 A	17-Jul-19	23
Construction		141	17-Jun-19 A	31-Dec-19 A	24-Sep-19	-69
Commissioning, Punch, Close Out		119	22-Jul-19 A	12-Jan-20 A	14-Nov-19	-37
Asbestos Remediation: 2020		195	02-Jan-20	01-Oct-20	20-Aug-20	-29
Design		40	02-Jan-20	26-Feb-20	14-Jan-20	-31
Bidding		30	27-Feb-20	08-Apr-20	26-Feb-20	-30
Award		20	09-Apr-20	06-May-20	25-Mar-20	-30
Permits		15	07-May-20	27-May-20	15-Apr-20	-30
Construction		55	28-May-20	12-Aug-20	02-Jul-20	-29
Commissioning, Punch, Close Out		35	13-Aug-20	01-Oct-20	20-Aug-20	-29
Asbestos Remediation: 2021		195	02-Oct-20	06-Jul-21	27-May-21	-28
Design		40	02-Oct-20	27-Nov-20	19-Oct-20	-28
Bidding		30	30-Nov-20	12-Jan-21	01-Dec-20	-28
Award		20	13-Jan-21	09-Feb-21	30-Dec-20	-28
Permits		15	10-Feb-21	02-Mar-21	21-Jan-21	-28
Construction		55	03-Mar-21	18-May-21	08-Apr-21	-28
Commissioning, Punch, Close Out		35	19-May-21	06-Jul-21	27-May-21	-28
Roofing Replacement		1026	03-Sep-18 A	02-Sep-22	02-Sep-22	0
Portland Public Schools Milestones		955	15-Dec-18 A	02-Sep-22	02-Sep-22	0
Project Milestones		955	15-Dec-18 A	02-Sep-22	02-Sep-22	0
Roofing Replacement: 2019		1026	03-Sep-18 A	02-Sep-22	02-Sep-22	0
Design		116	03-Sep-18 A	21-Feb-19 A	21-Feb-19	0
Bidding		34	22-Feb-19 A	11-Apr-19 A	11-Apr-19	0
Award		30	15-Apr-19 A	28-May-19 A	28-May-19	0
Permits		39	12-Apr-19 A	07-Jun-19 A	07-Jun-19	0
Construction		804	17-Jun-19 A	29-Jul-22	29-Jul-22	0
Commissioning, Punch, Close Out		761	23-Sep-19 A	02-Sep-22	02-Sep-22	0
Roofing Replacement: 2020 - Pkg 1		382	03-Jun-19 A	30-Nov-20	30-Oct-20	-20
Design		203	03-Jun-19 A	23-Mar-20 A	23-Mar-20	0
Permits		65	24-Mar-20 A	23-Jun-20 A	23-Jun-20	0
Construction		113	19-May-20 A	23-Oct-20	25-Sep-20	-20
Commissioning, Punch, Close Out		25	26-Oct-20	30-Nov-20	30-Oct-20	-20
Roofing Replacement: 2020 - Pkg 2		289	23-Dec-19 A	05-Feb-21	05-Feb-21	0



Remaining Level of Effort | Primary Baseline | Remaining Work | Milestone
Actual Level of Effort | Actual Work | Critical Remaining Work | Summary

TASK filter: All Activities

© Oracle Corporation

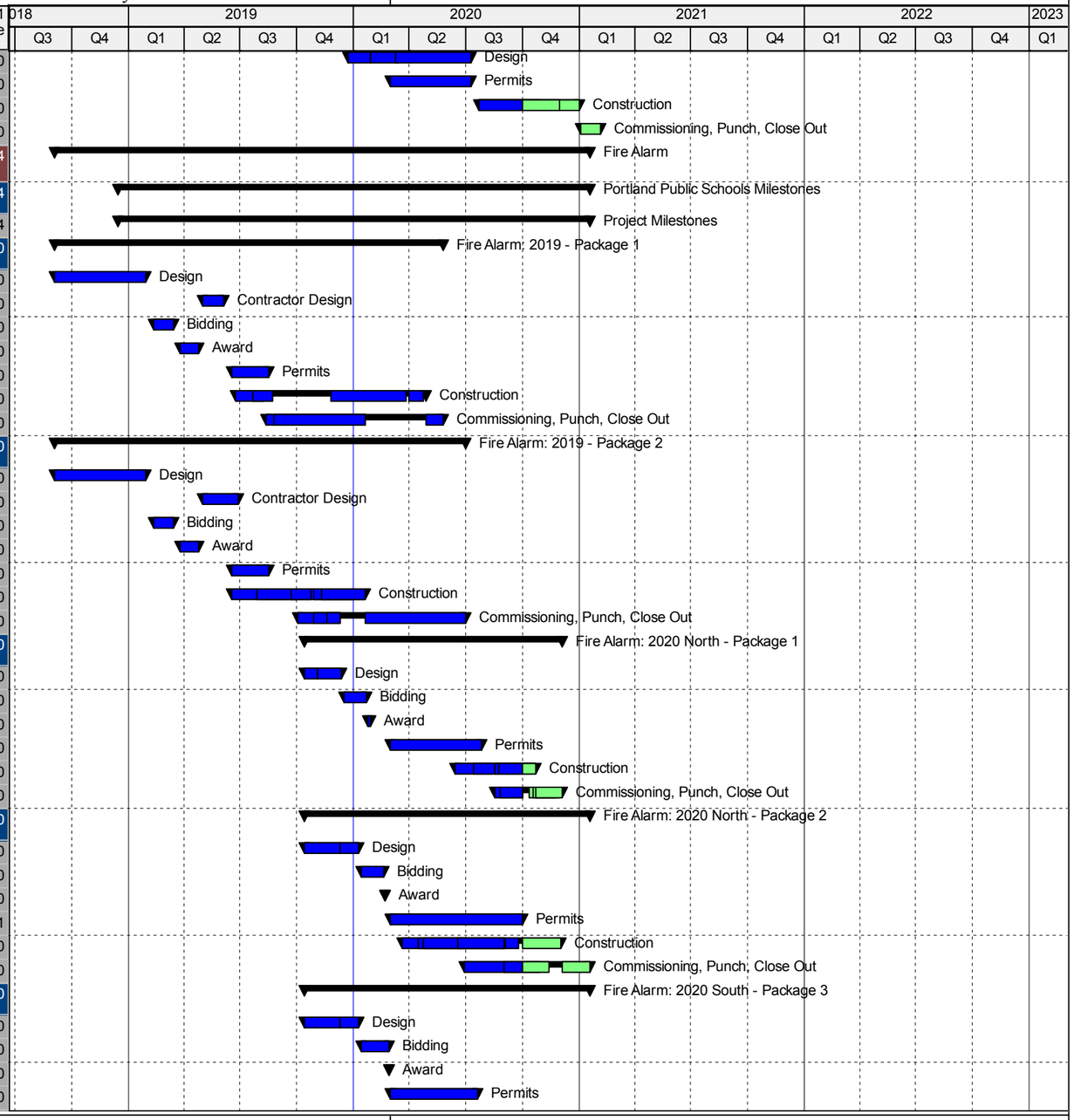
Portland Public Schools (PPS)

Master Planning Schedule

PPS - H+S BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL1 Finish	Variance - BL1 Finish Date
	Design	142	23-Dec-19 A	10-Jul-20 A	10-Jul-20	0
	Permits	94	02-Mar-20 A	10-Jul-20 A	10-Jul-20	0
	Construction	113	23-Jul-20 A	31-Dec-20	31-Dec-20	0
	Commissioning, Punch, Close Out	25	04-Jan-21	05-Feb-21	05-Feb-21	0
	Fire Alarm	603	03-Sep-18 A	19-Jan-21	08-Feb-21	14
	Portland Public Schools Milestones	532	15-Dec-18 A	19-Jan-21	08-Feb-21	14
	Project Milestones	532	15-Dec-18 A	19-Jan-21	08-Feb-21	14
	Fire Alarm: 2019 - Package 1	435	03-Sep-18 A	25-May-20 A	25-May-20	0
	Design	100	03-Sep-18 A	30-Jan-19 A	30-Jan-19	0
	Contractor Design	23	01-May-19 A	04-Jun-19 A	04-Jun-19	0
	Bidding	23	12-Feb-19 A	14-Mar-19 A	14-Mar-19	0
	Award	23	25-Mar-19 A	25-Apr-19 A	25-Apr-19	0
	Permits	43	17-Jun-19 A	16-Aug-19 A	16-Aug-19	0
	Construction	212	25-Jun-19 A	27-Apr-20 A	27-Apr-20	0
	Commissioning, Punch, Close Out	199	12-Aug-19 A	25-May-20 A	25-May-20	0
	Fire Alarm: 2019 - Package 2	462	03-Sep-18 A	01-Jul-20 A	01-Jul-20	0
	Design	100	03-Sep-18 A	30-Jan-19 A	30-Jan-19	0
	Contractor Design	41	01-May-19 A	28-Jun-19 A	28-Jun-19	0
	Bidding	23	12-Feb-19 A	14-Mar-19 A	14-Mar-19	0
	Award	23	25-Mar-19 A	25-Apr-19 A	25-Apr-19	0
	Permits	43	17-Jun-19 A	16-Aug-19 A	16-Aug-19	0
	Construction	148	17-Jun-19 A	20-Jan-20 A	20-Jan-20	0
	Commissioning, Punch, Close Out	190	02-Oct-19 A	01-Jul-20 A	01-Jul-20	0
	Fire Alarm: 2020 North - Package 1	293	14-Oct-19 A	04-Dec-20	04-Dec-20	0
	Design	41	14-Oct-19 A	13-Dec-19 A	13-Dec-19	0
	Bidding	25	17-Dec-19 A	23-Jan-20 A	23-Jan-20	0
	Award	2	24-Jan-20 A	28-Jan-20 A	28-Jan-20	0
	Permits	106	02-Mar-20 A	28-Jul-20 A	28-Jul-20	0
	Construction	93	15-Jun-20 A	22-Oct-20	22-Oct-20	0
	Commissioning, Punch, Close Out	78	17-Aug-20 A	04-Dec-20	04-Dec-20	0
	Fire Alarm: 2020 North - Package 2	322	14-Oct-19 A	18-Jan-21	18-Jan-21	0
	Design	59	14-Oct-19 A	10-Jan-20 A	10-Jan-20	0
	Bidding	28	13-Jan-20 A	20-Feb-20 A	20-Feb-20	0
	Award	0	21-Feb-20 A	21-Feb-20 A	21-Feb-20	0
	Permits	152	02-Mar-20 A	01-Oct-20	01-Sep-20	-21
	Construction	183	20-Mar-20 A	03-Dec-20	03-Dec-20	0
	Commissioning, Punch, Close Out	142	29-Jun-20 A	18-Jan-21	18-Jan-21	0
	Fire Alarm: 2020 South - Package 3	323	14-Oct-19 A	19-Jan-21	19-Jan-21	0
	Design	59	14-Oct-19 A	10-Jan-20 A	10-Jan-20	0
	Bidding	33	13-Jan-20 A	27-Feb-20 A	27-Feb-20	0
	Award	0	28-Feb-20 A	28-Feb-20 A	28-Feb-20	0
	Permits	101	02-Mar-20 A	21-Jul-20 A	21-Jul-20	0



Remaining Level of Effort | Primary Baseline | Remaining Work | Milestone
Actual Level of Effort | Actual Work | Critical Remaining Work | Summary

TASK filter: All Activities

© Oracle Corporation

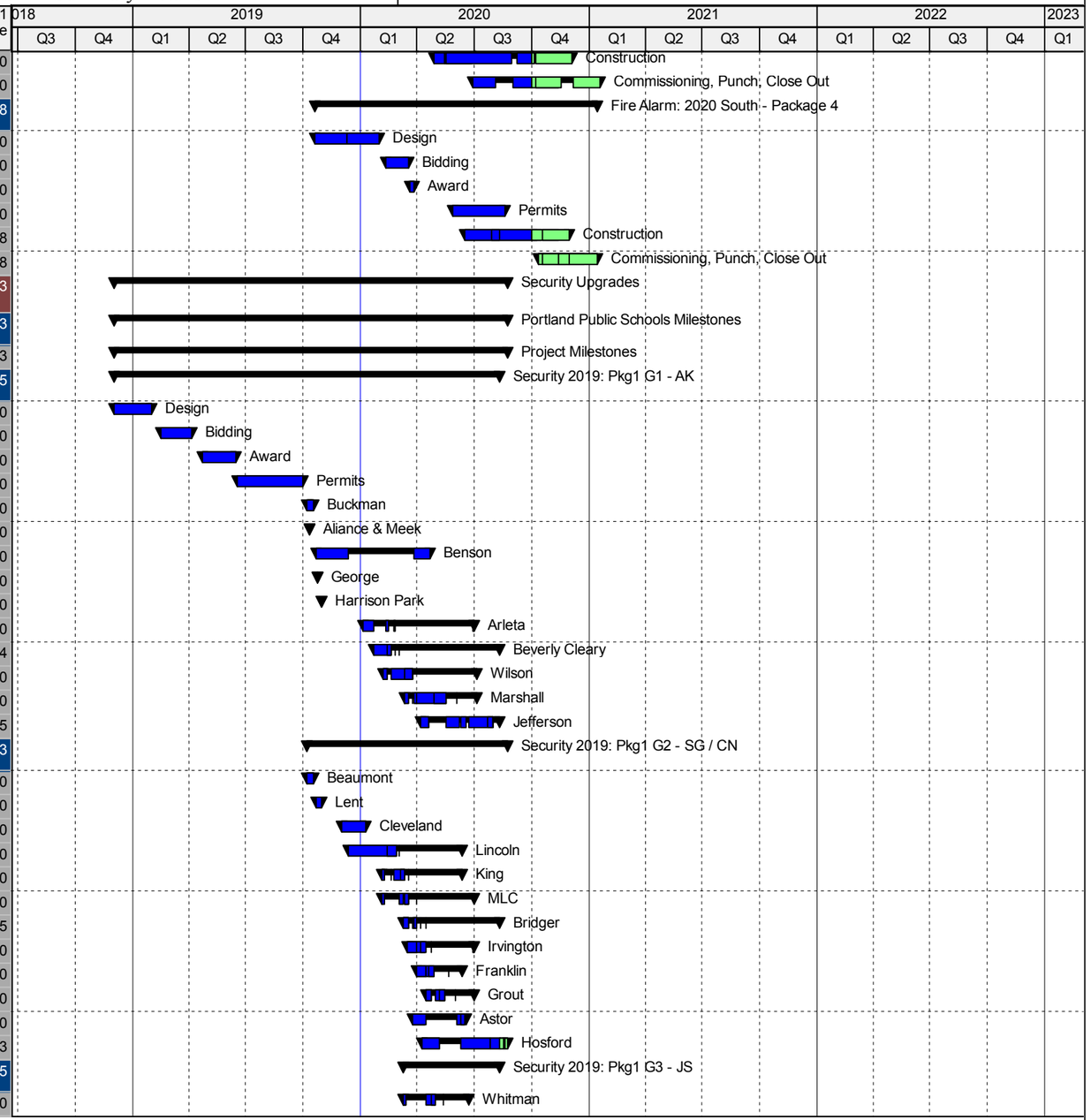
Portland Public Schools (PPS)

Master Planning Schedule

PPS - H+S BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL1 Finish	Variance - BL1 Finish Date
	Construction	158	27-Apr-20 A	04-Dec-20	04-Dec-20	0
	Commissioning, Punch, Close Out	143	29-Jun-20 A	19-Jan-21	19-Jan-21	0
	Fire Alarm: 2020 South - Package 4	314	21-Oct-19 A	13-Jan-21	08-Feb-21	18
	Design	68	21-Oct-19 A	30-Jan-20 A	30-Jan-20	0
	Bidding	27	11-Feb-20 A	19-Mar-20 A	19-Mar-20	0
	Award	4	20-Mar-20 A	26-Mar-20 A	26-Mar-20	0
	Permits	60	28-May-20 A	20-Aug-20 A	20-Aug-20	0
	Construction	117	17-Jun-20 A	30-Nov-20	24-Dec-20	18
	Commissioning, Punch, Close Out	65	12-Oct-20	13-Jan-21	08-Feb-21	18
	Security Upgrades	451	03-Dec-18 A	24-Aug-20	19-Aug-20	-3
	Portland Public Schools Milestones	440	03-Dec-18 A	24-Aug-20	19-Aug-20	-3
	Project Milestones	440	03-Dec-18 A	24-Aug-20	19-Aug-20	-3
	Security 2019: Pkg1 G1 - AK	442	03-Dec-18 A	11-Aug-20	04-Aug-20	-5
	Design	41	03-Dec-18 A	31-Jan-19 A	31-Jan-19	0
	Bidding	36	15-Feb-19 A	05-Apr-19 A	05-Apr-19	0
	Award	38	23-Apr-19 A	14-Jun-19 A	14-Jun-19	0
	Permits	74	17-Jun-19 A	30-Sep-19 A	30-Sep-19	0
	Buckman	8	07-Oct-19 A	17-Oct-19 A	17-Oct-19	0
	Aliance & Meek	0	11-Oct-19 A	11-Oct-19 A	11-Oct-19	0
	Benson	104	22-Oct-19 A	21-Apr-20 A	21-Apr-20	0
	George	1	23-Oct-19 A	23-Oct-19 A	23-Oct-19	0
	Harrison Park	1	31-Oct-19 A	31-Oct-19 A	31-Oct-19	0
	Arleta	102	06-Jan-20 A	30-Jun-20 A	30-Jun-20	0
	Beverly Cleary	115	23-Jan-20 A	11-Aug-20	04-Aug-20	-4
	Wilson	106	07-Feb-20 A	06-Jul-20 A	06-Jul-20	0
	Marshall	82	12-Mar-20 A	06-Jul-20 A	06-Jul-20	0
	Jefferson	92	06-Apr-20 A	11-Aug-20	04-Aug-20	-5
	Security 2019: Pkg1 G2 - SG / CN	231	07-Oct-19 A	24-Aug-20	19-Aug-20	-3
	Beaumont	8	07-Oct-19 A	17-Oct-19 A	17-Oct-19	0
	Lent	7	22-Oct-19 A	31-Oct-19 A	31-Oct-19	0
	Cleveland	23	02-Dec-19 A	08-Jan-20 A	08-Jan-20	0
	Lincoln	104	12-Dec-19 A	11-Jun-20 A	11-Jun-20	0
	King	93	03-Feb-20 A	11-Jun-20 A	11-Jun-20	0
	MLC	108	03-Feb-20 A	02-Jul-20 A	02-Jul-20	0
	Bridger	111	10-Mar-20 A	11-Aug-20	04-Aug-20	-5
	Irvington	77	16-Mar-20 A	30-Jun-20 A	30-Jun-20	0
	Franklin	51	01-Apr-20 A	11-Jun-20 A	11-Jun-20	0
	Grout	55	16-Apr-20 A	02-Jul-20 A	02-Jul-20	0
	Astor	61	25-Mar-20 A	18-Jun-20 A	18-Jun-20	0
	Hosford	98	09-Apr-20 A	24-Aug-20	19-Aug-20	-3
	Security 2019: Pkg1 G3 - JS	112	09-Mar-20 A	11-Aug-20	04-Aug-20	-5
	Whitman	76	09-Mar-20 A	23-Jun-20 A	23-Jun-20	0



Remaining Level of Effort | Primary Baseline | Remaining Work | Milestone
Actual Level of Effort | Actual Work | Critical Remaining Work | Summary

TASK filter: All Activities

© Oracle Corporation

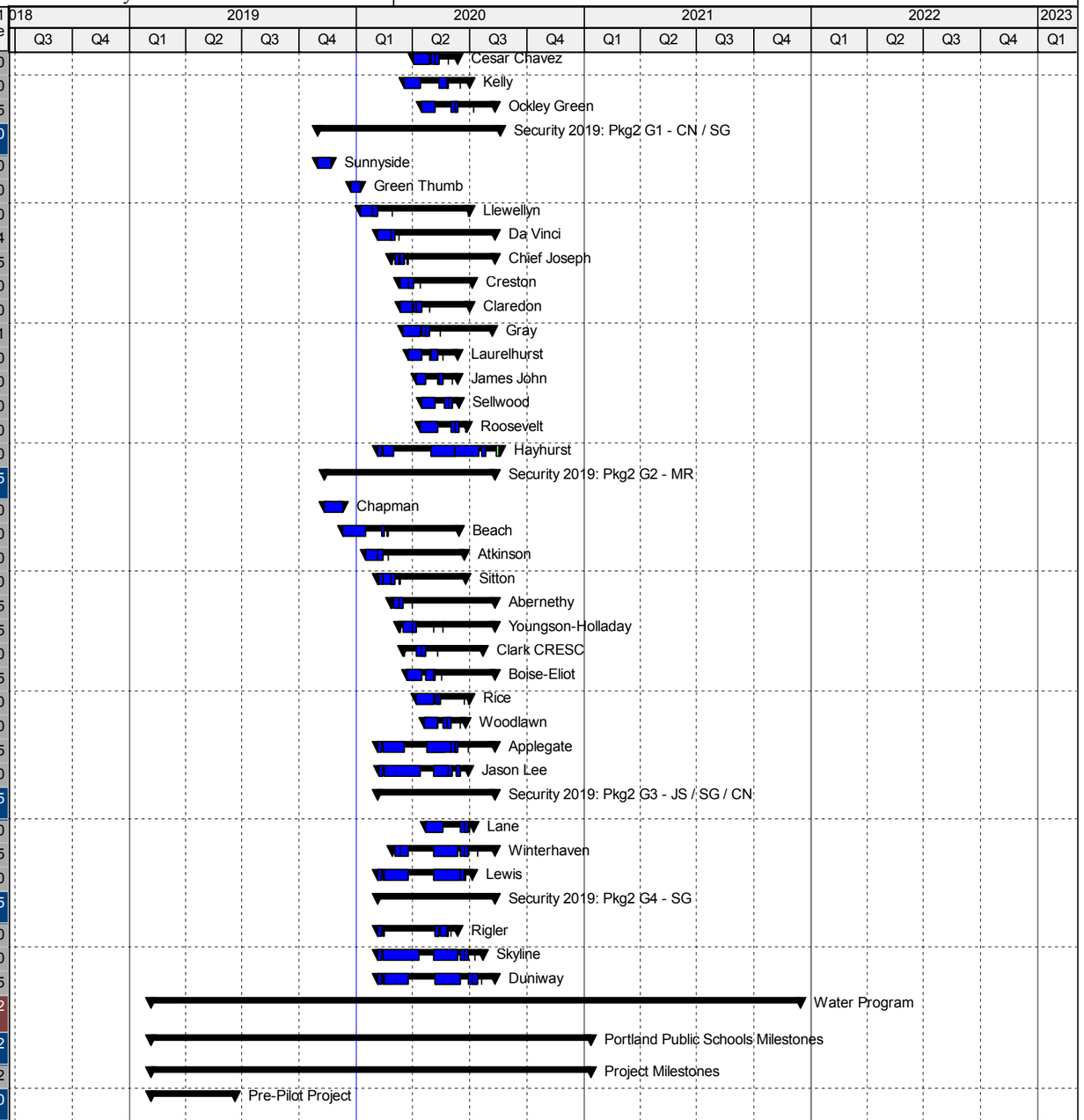
Portland Public Schools (PPS)

Master Planning Schedule

PPS - H+S BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL1 Finish	Variance - BL1 Finish Date
	Cesar Chavez	50	02-Apr-20 A	11-Jun-20 A	11-Jun-20	0
	Kelly	75	18-Mar-20 A	01-Jul-20 A	01-Jul-20	0
	Ockley Green	86	14-Apr-20 A	11-Aug-20	04-Aug-20	-5
	Security 2019: Pkg2 G1 - CN / SG	210	31-Oct-19 A	19-Aug-20	19-Aug-20	0
	Sunnyside	12	31-Oct-19 A	20-Nov-19 A	20-Nov-19	0
	Green Thumb	9	23-Dec-19 A	06-Jan-20 A	06-Jan-20	0
	Llewellyn	126	07-Jan-20 A	30-Jun-20 A	30-Jun-20	0
	Da Vinci	108	05-Feb-20 A	11-Aug-20	04-Aug-20	-4
	Chief Joseph	121	25-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Creston	85	09-Mar-20 A	06-Jul-20 A	06-Jul-20	0
	Claredon	80	12-Mar-20 A	02-Jul-20 A	02-Jul-20	0
	Gray	103	16-Mar-20 A	06-Aug-20 A	04-Aug-20	-1
	Laurelhurst	56	25-Mar-20 A	11-Jun-20 A	11-Jun-20	0
	James John	47	07-Apr-20 A	11-Jun-20 A	11-Jun-20	0
	Sellwood	43	15-Apr-20 A	15-Jun-20 A	15-Jun-20	0
	Roosevelt	54	13-Apr-20 A	26-Jun-20 A	26-Jun-20	0
	Hayhurst	142	04-Feb-20 A	19-Aug-20	19-Aug-20	0
	Security 2019: Pkg2 G2 - MR	197	11-Nov-19 A	11-Aug-20	04-Aug-20	-5
	Chapman	18	11-Nov-19 A	10-Dec-19 A	10-Dec-19	0
	Beach	107	10-Dec-19 A	15-Jun-20 A	15-Jun-20	0
	Atkinson	114	15-Jan-20 A	23-Jun-20 A	23-Jun-20	0
	Sitton	102	03-Feb-20 A	24-Jun-20 A	24-Jun-20	0
	Abernethy	121	25-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Youngson-Holladay	111	10-Mar-20 A	11-Aug-20	04-Aug-20	-5
	Clark CRESC	91	17-Mar-20 A	22-Jul-20 A	22-Jul-20	0
	Boise-Eliot	102	23-Mar-20 A	11-Aug-20	04-Aug-20	-5
	Rice	61	07-Apr-20 A	30-Jun-20 A	30-Jun-20	0
	Woodlawn	48	20-Apr-20 A	25-Jun-20 A	25-Jun-20	0
	Applegate	136	04-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Jason Lee	103	06-Feb-20 A	30-Jun-20 A	30-Jun-20	0
	Security 2019: Pkg2 G3 - JS / SG / CN	136	04-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Lane	56	21-Apr-20 A	08-Jul-20 A	08-Jul-20	0
	Winterhaven	119	27-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Lewis	109	04-Feb-20 A	06-Jul-20 A	06-Jul-20	0
	Security 2019: Pkg2 G4 - SG	136	04-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Rigler	92	04-Feb-20 A	11-Jun-20 A	11-Jun-20	0
	Skyline	121	04-Feb-20 A	22-Jul-20 A	22-Jul-20	0
	Duniway	136	04-Feb-20 A	11-Aug-20	04-Aug-20	-5
	Water Program	735	04-Feb-19 A	14-Dec-21	12-Nov-21	-22
	Portland Public Schools Milestones	495	04-Feb-19 A	12-Jan-21	09-Dec-20	-22
	Project Milestones	495	04-Feb-19 A	12-Jan-21	09-Dec-20	-22
	Pre-Pilot Project	97	04-Feb-19 A	19-Jun-19 A	19-Jun-19	0



Remaining Level of Effort | Primary Baseline | Remaining Work | Milestone
Actual Level of Effort | Actual Work | Critical Remaining Work | Summary

TASK filter: All Activities

© Oracle Corporation

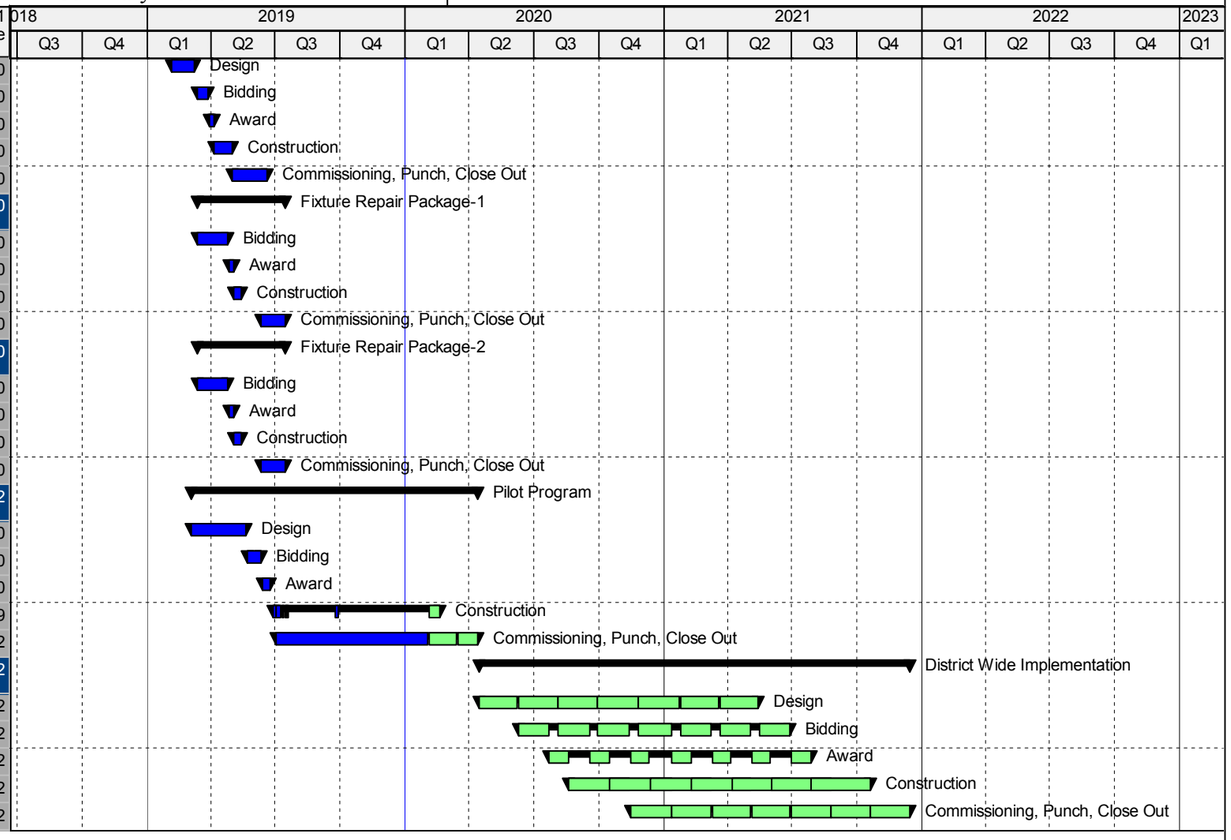
Portland Public Schools (PPS)

Master Planning Schedule

PPS - H+S BL Summary Details

Run Date: 13-Oct-20

Activity ID	Activity Name	At Completion Duration	Start	Finish	BL1 Finish	Variance - BL1 Finish Date
	Design	25	04-Feb-19 A	08-Mar-19 A	08-Mar-19	0
	Bidding	12	13-Mar-19 A	28-Mar-19 A	28-Mar-19	0
	Award	5	29-Mar-19 A	04-Apr-19 A	04-Apr-19	0
	Construction	18	05-Apr-19 A	30-Apr-19 A	30-Apr-19	0
	Commissioning, Punch, Close Out	35	01-May-19 A	19-Jun-19 A	19-Jun-19	0
	Fixture Repair Package-1	88	12-Mar-19 A	15-Jul-19 A	15-Jul-19	0
	Bidding	33	12-Mar-19 A	25-Apr-19 A	25-Apr-19	0
	Award	5	26-Apr-19 A	02-May-19 A	02-May-19	0
	Construction	7	03-May-19 A	13-May-19 A	13-May-19	0
	Commissioning, Punch, Close Out	25	10-Jun-19 A	15-Jul-19 A	15-Jul-19	0
	Fixture Repair Package-2	88	12-Mar-19 A	15-Jul-19 A	15-Jul-19	0
	Bidding	33	12-Mar-19 A	25-Apr-19 A	25-Apr-19	0
	Award	5	26-Apr-19 A	02-May-19 A	02-May-19	0
	Construction	7	03-May-19 A	13-May-19 A	13-May-19	0
	Commissioning, Punch, Close Out	25	10-Jun-19 A	15-Jul-19 A	15-Jul-19	0
	Pilot Program	283	04-Mar-19 A	13-Apr-20	12-Mar-20	-22
	Design	56	04-Mar-19 A	20-May-19 A	20-May-19	0
	Bidding	14	22-May-19 A	11-Jun-19 A	11-Jun-19	0
	Award	7	14-Jun-19 A	24-Jun-19 A	24-Jun-19	0
	Construction	162	28-Jun-19 A	19-Feb-20	23-Jan-20	-19
	Commissioning, Punch, Close Out	198	02-Jul-19 A	13-Apr-20	12-Mar-20	-22
	District Wide Implementation	432	14-Apr-20	14-Dec-21	12-Nov-21	-22
	Design	280	14-Apr-20	14-May-21	14-Apr-21	-22
	Bidding	272	09-Jun-20	29-Jun-21	28-May-21	-22
	Award	260	23-Jul-20	27-Jul-21	25-Jun-21	-22
	Construction	300	20-Aug-20	19-Oct-21	17-Sep-21	-22
	Commissioning, Punch, Close Out	280	16-Nov-20	14-Dec-21	12-Nov-21	-22



Remaining Level of Effort | Primary Baseline | Remaining Work | Milestone
Actual Level of Effort | Actual Work | Critical Remaining Work | Summary

TASK filter: All Activities

© Oracle Corporation

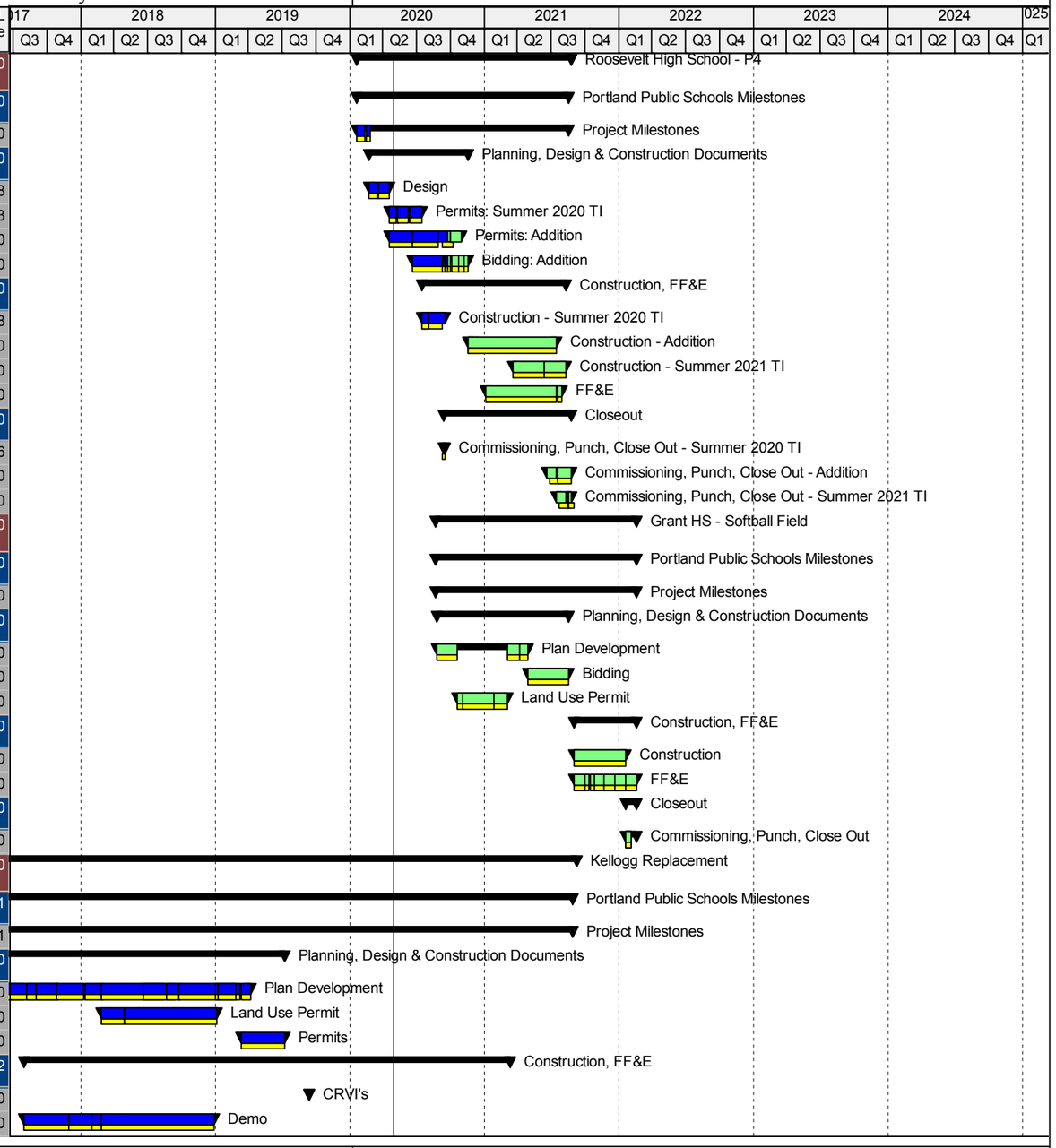
Portland Public Schools (PPS)

Master Planning Schedule

PPS - R2.1 BL Summary Details

Run Date: 13-Oct-20

-	Activity ID	Activity Name	At Completion Duration	Start	Finish	BL Project Finish	Variance - BL Project Finish Date
Roosevelt High School - P4			417	23-Jan-20 A	27-Aug-21	27-Aug-21	0
Portland Public Schools Milestones			407	23-Jan-20 A	19-Aug-21	19-Aug-21	0
Project Milestones			407	23-Jan-20 A	19-Aug-21	19-Aug-21	0
Planning, Design & Construction Documents			193	24-Feb-20 A	18-Nov-20	18-Nov-20	0
Design			39	24-Feb-20 A	17-Apr-20 A	18-Aug-20	88
Permits: Summer 2020 TI			63	17-Apr-20 A	15-Jul-20 A	09-Jul-20	-3
Permits: Addition			140	20-Apr-20 A	30-Oct-20	30-Oct-20	0
Bidding: Addition			108	22-Jun-20 A	18-Nov-20	18-Nov-20	0
Construction, FF&E			277	16-Jul-20 A	12-Aug-21	12-Aug-21	0
Construction - Summer 2020 TI			45	16-Jul-20 A	18-Sep-20 A	27-Oct-20	28
Construction - Addition			170	19-Nov-20	16-Jul-21	16-Jul-21	0
Construction - Summer 2021 TI			104	22-Mar-21	12-Aug-21	12-Aug-21	0
FF&E			150	04-Jan-21	30-Jul-21	30-Jul-21	0
Closeout			250	14-Sep-20 A	27-Aug-21	27-Aug-21	0
Commissioning, Punch, Close Out - Summer 2020 TI			4	14-Sep-20 A	18-Sep-20 A	25-Sep-20	6
Commissioning, Punch, Close Out - Addition			50	21-Jun-21	27-Aug-21	27-Aug-21	0
Commissioning, Punch, Close Out - Summer 2021 TI			31	16-Jul-21	27-Aug-21	27-Aug-21	0
Grant HS - Softball Field			386	24-Aug-20 A	18-Feb-22	18-Feb-22	0
Portland Public Schools Milestones			385	24-Aug-20 A	17-Feb-22	17-Feb-22	0
Project Milestones			385	24-Aug-20 A	17-Feb-22	17-Feb-22	0
Planning, Design & Construction Documents			255	24-Aug-20	19-Aug-21	19-Aug-21	0
Plan Development			175	24-Aug-20	29-Apr-21	29-Apr-21	0
Bidding			80	30-Apr-21	19-Aug-21	19-Aug-21	0
Land Use Permit			95	20-Oct-20	04-Mar-21	04-Mar-21	0
Construction, FF&E			121	03-Sep-21	18-Feb-22	18-Feb-22	0
Construction			100	03-Sep-21	20-Jan-22	20-Jan-22	0
FF&E			121	03-Sep-21	18-Feb-22	18-Feb-22	0
Closeout			20	21-Jan-22	17-Feb-22	17-Feb-22	0
Commissioning, Punch, Close Out			20	21-Jan-22	17-Feb-22	17-Feb-22	0
Kellogg Replacement			1121	01-May-17 A	10-Sep-21	27-Aug-21	-10
Portland Public Schools Milestones			1112	01-May-17 A	30-Aug-21	27-Aug-21	-1
Project Milestones			1112	01-May-17 A	30-Aug-21	27-Aug-21	-1
Planning, Design & Construction Documents			563	01-May-17 A	10-Jul-19 A	10-Jul-19	0
Plan Development			499	01-May-17 A	09-Apr-19 A	09-Apr-19	0
Land Use Permit			219	26-Feb-18 A	07-Jan-19 A	07-Jan-19	0
Permits			84	12-Mar-19 A	10-Jul-19 A	10-Jul-19	0
Construction, FF&E			924	01-Aug-17 A	11-Mar-21	15-Mar-21	2
CRVI's			0	13-Sep-19 A	13-Sep-19 A	13-Sep-19	0
Demo			364	01-Aug-17 A	31-Dec-18 A	31-Dec-18	0



Remaining Level of Effort | Baseline | Actual Work | Critical Remaining ...
Actual Level of Effort | Primary Baseline | Remaining Work | Milestone

TASK filter: -Responsibility.

© Oracle Corporation

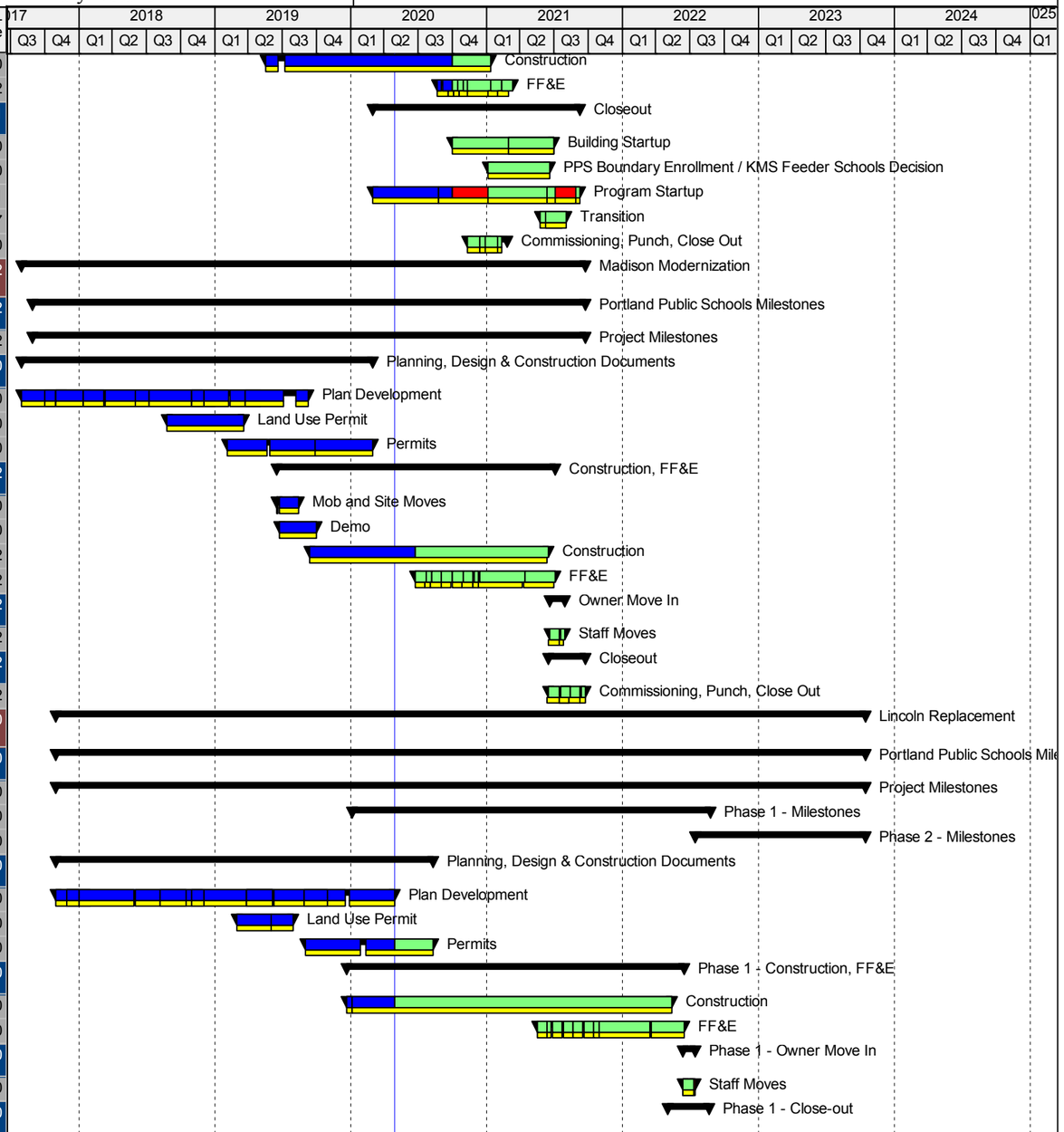
Portland Public Schools (PPS)

Master Planning Schedule

PPS - R2.1 BL Summary Details

Run Date: 13-Oct-20

-	Activity ID	Activity Name	At Completion Duration	Start	Finish	BL Project Finish	Variance - BL Project Finish Date
		Construction	421	20-May-19 A	13-Jan-21	13-Jan-21	0
		FF&E	140	24-Aug-20 A	11-Mar-21	15-Mar-21	2
		Closeout	396	02-Mar-20 A	10-Sep-21	26-Aug-21	-11
		Building Startup	192	01-Oct-20	01-Jul-21	01-Jul-21	0
		PPS Boundary Enrollment / KMS Feeder Schools Decision	120	04-Jan-21	21-Jun-21	21-Jun-21	0
		Program Startup	396	02-Mar-20 A	10-Sep-21	01-Jul-21	-51
		Transition	49	27-May-21	04-Aug-21	26-Aug-21	17
		Commissioning, Punch, Close Out	75	11-Nov-20	25-Feb-21	25-Feb-21	0
		Madison Modernization	1065	01-Aug-17 A	24-Sep-21	22-Sep-21	-2
		Portland Public Schools Milestones	1043	31-Aug-17 A	24-Sep-21	22-Sep-21	-2
		Project Milestones	1043	31-Aug-17 A	24-Sep-21	22-Sep-21	-2
		Planning, Design & Construction Documents	660	01-Aug-17 A	02-Mar-20 A	02-Mar-20	0
		Plan Development	540	01-Aug-17 A	10-Sep-19 A	10-Sep-19	0
		Land Use Permit	141	27-Aug-18 A	21-Mar-19 A	21-Mar-19	0
		Permits	273	04-Feb-19 A	02-Mar-20 A	02-Mar-20	0
		Construction, FF&E	526	17-Jun-19 A	06-Jul-21	02-Jul-21	-2
		Mob and Site Moves	42	17-Jun-19 A	15-Aug-19 A	15-Aug-19	0
		Demo	69	24-Jun-19 A	01-Oct-19 A	01-Oct-19	0
		Construction	448	16-Sep-19 A	15-Jun-21	11-Jun-21	-2
		FF&E	265	25-Jun-20	06-Jul-21	02-Jul-21	-2
		Owner Move In	30	21-Jun-21	30-Jul-21	28-Jul-21	-2
		Staff Moves	30	21-Jun-21	30-Jul-21	28-Jul-21	-2
		Closeout	73	16-Jun-21	24-Sep-21	22-Sep-21	-2
		Commissioning, Punch, Close Out	73	16-Jun-21	24-Sep-21	22-Sep-21	-2
		Lincoln Replacement	1536	01-Nov-17 A	17-Oct-23	17-Oct-23	0
		Portland Public Schools Milestones	1536	01-Nov-17 A	17-Oct-23	17-Oct-23	0
		Project Milestones	1536	01-Nov-17 A	17-Oct-23	17-Oct-23	0
		Phase 1 - Milestones	685	07-Jan-20 A	26-Aug-22	26-Aug-22	0
		Phase 2 - Milestones	327	18-Jul-22	17-Oct-23	17-Oct-23	0
		Planning, Design & Construction Documents	710	01-Nov-17 A	11-Aug-20	11-Aug-20	0
		Plan Development	637	01-Nov-17 A	01-May-20	01-May-20	0
		Land Use Permit	107	01-Mar-19 A	01-Aug-19 A	01-Aug-19	0
		Permits	241	03-Sep-19 A	11-Aug-20	11-Aug-20	0
		Phase 1 - Construction, FF&E	644	23-Dec-19 A	17-Jun-22	17-Jun-22	0
		Construction	619	23-Dec-19 A	13-May-22	13-May-22	0
		FF&E	285	17-May-21	17-Jun-22	17-Jun-22	0
		Phase 1 - Owner Move In	25	13-Jun-22	18-Jul-22	18-Jul-22	0
		Staff Moves	25	13-Jun-22	18-Jul-22	18-Jul-22	0
		Phase 1 - Close-out	81	02-May-22	22-Aug-22	22-Aug-22	0



Remaining Level of Effort | Actual Level of Effort | Baseline | Primary Baseline | Actual Work | Remaining Work | Critical Remaining ... | Milestone

TASK filter: -Responsibility.

© Oracle Corporation

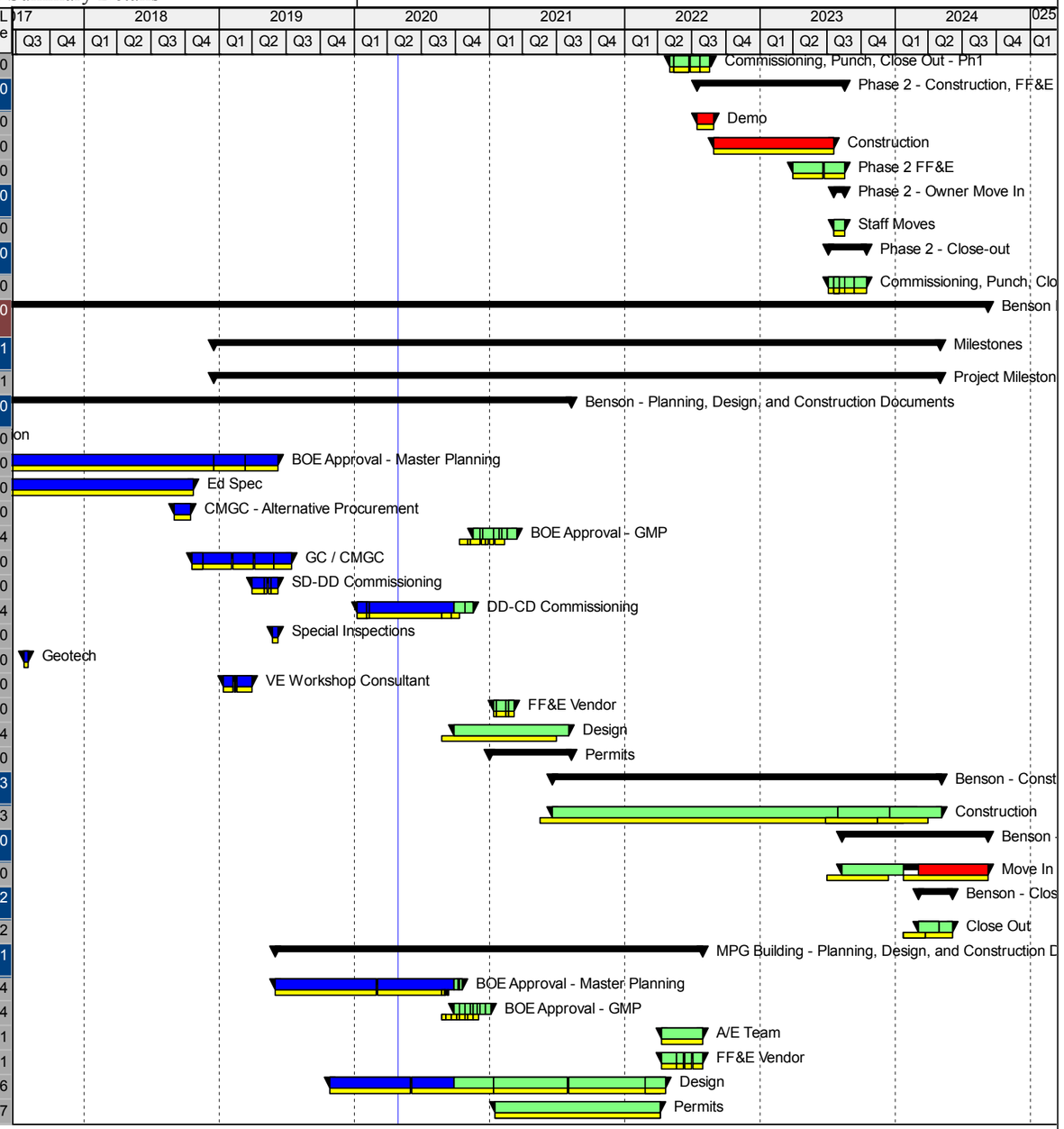
Portland Public Schools (PPS)

Master Planning Schedule

PPS - R2.1 BL Summary Details

Run Date: 13-Oct-20

-	Activity ID	Activity Name	At Completion Duration	Start	Finish	BL Project Finish	Variance - BL Project Finish Date
		Commissioning, Punch, Close Out - Ph1	81	02-May-22	22-Aug-22	22-Aug-22	0
		Phase 2 - Construction, FF&E	284	18-Jul-22	17-Aug-23	17-Aug-23	0
		Demo	31	18-Jul-22	29-Aug-22	29-Aug-22	0
		Construction	233	30-Aug-22	20-Jul-23	20-Jul-23	0
		Phase 2 FF&E	100	31-Mar-23	17-Aug-23	17-Aug-23	0
		Phase 2 - Owner Move In	20	21-Jul-23	17-Aug-23	17-Aug-23	0
		Staff Moves	20	21-Jul-23	17-Aug-23	17-Aug-23	0
		Phase 2 - Close-out	73	07-Jul-23	17-Oct-23	17-Oct-23	0
		Commissioning, Punch, Close Out - Ph2	73	07-Jul-23	17-Oct-23	17-Oct-23	0
		Benson HS	2046	11-Oct-16 A	09-Sep-24	09-Sep-24	0
		Milestones	1389	18-Dec-18 A	03-May-24	24-Aug-23	-181
		Project Milestones	1389	18-Dec-18 A	03-May-24	24-Aug-23	-181
		Benson - Planning, Design, and Construction Docu	1241	11-Oct-16 A	09-Aug-21	09-Aug-21	0
		A/E Selection	22	11-Oct-16 A	10-Nov-16 A	10-Nov-16	0
		BOE Approval - Master Planning	664	11-Nov-16 A	11-Jun-19 A	11-Jun-19	0
		Ed Spec	508	11-Nov-16 A	26-Oct-18 A	26-Oct-18	0
		CMGC - Alternative Procurement	32	03-Sep-18 A	19-Oct-18 A	19-Oct-18	0
		BOE Approval - GMP	85	17-Nov-20	18-Mar-21	30-Dec-20	-54
		GC / CMGC	186	20-Oct-18 A	18-Jul-19 A	18-Jul-19	0
		SD-DD Commissioning	49	01-Apr-19 A	10-Jun-19 A	10-Jun-19	0
		DD-CD Commissioning	220	10-Jan-20 A	17-Nov-20	05-Jun-20	-114
		Special Inspections	11	28-May-19 A	12-Jun-19 A	12-Jun-19	0
		Geotech	7	26-Jul-17 A	04-Aug-17 A	04-Aug-17	0
		VE Workshop Consultant	53	15-Jan-19 A	01-Apr-19 A	01-Apr-19	0
		FF&E Vendor	40	12-Jan-21	08-Mar-21	08-Mar-21	0
		Design	220	28-Sep-20	05-Aug-21	05-Oct-20	-214
		Permits	156	31-Dec-20	09-Aug-21	09-Aug-21	0
		Benson - Construction	751	21-Jun-21	06-May-24	01-Aug-24	63
		Construction	751	21-Jun-21	06-May-24	01-Aug-24	63
		Benson - Move In	282	11-Aug-23	09-Sep-24	09-Sep-24	0
		Move In	282	11-Aug-23	09-Sep-24	09-Sep-24	0
		Benson - Close Out	67	04-Mar-24	04-Jun-24	06-Jun-24	2
		Close Out	67	04-Mar-24	04-Jun-24	06-Jun-24	2
		MPG Building - Planning, Design, and Constructior	814	03-Jun-19 A	29-Jul-22	24-Jul-20	-521
		BOE Approval - Master Planning	352	03-Jun-19 A	19-Oct-20	08-May-20	-114
		BOE Approval - GMP	70	28-Sep-20	07-Jan-21	24-Jul-20	-114
		A/E Team	80	11-Apr-22	29-Jul-22	01-May-20	-581
		FF&E Vendor	80	11-Apr-22	29-Jul-22	26-Jun-20	-541
		Design	641	28-Oct-19 A	22-Apr-22	24-Apr-20	-516
		Permits	320	18-Jan-21	08-Apr-22	23-Apr-20	-507



Remaining Level of Effort | Actual Level of Effort | Baseline | Primary Baseline | Actual Work | Remaining Work | Critical Remaining ... | Milestone

TASK filter: -Responsibility.

© Oracle Corporation

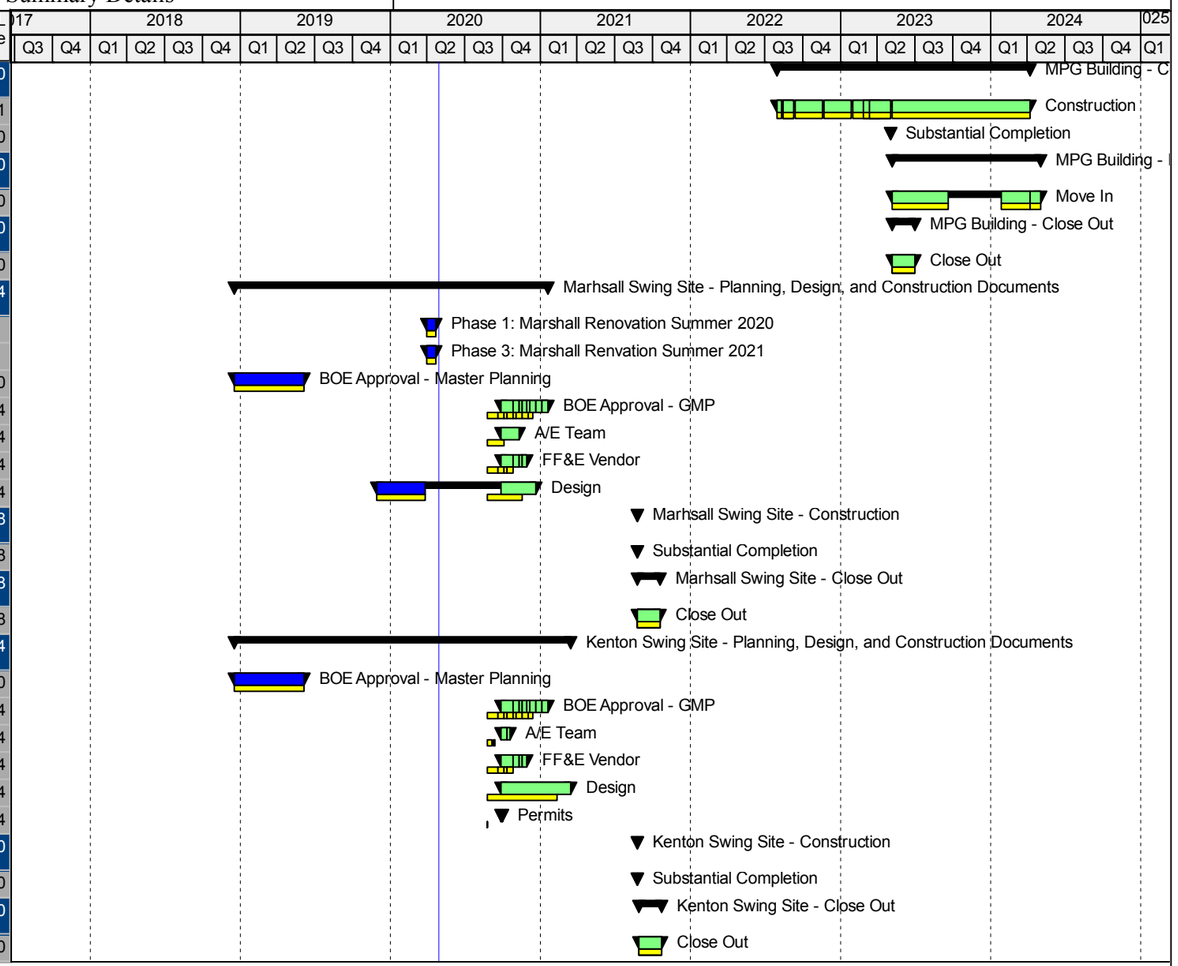
Portland Public Schools (PPS)

Master Planning Schedule

PPS - R2.1 BL Summary Details

Run Date: 13-Oct-20

-	Activity ID	Activity Name	At Completion Duration	Start	Finish	BL Project Finish	Variance - BL Project Finish Date
		MPG Building - Construction	440	01-Aug-22	05-Apr-24	27-Feb-23	-290
		Construction	440	01-Aug-22	05-Apr-24	24-Feb-23	-291
		Substantial Completion	0	05-May-23	05-May-23	27-Feb-23	-50
		MPG Building - Move In	260	08-May-23	03-May-24	14-Aug-23	-190
		Move In	260	08-May-23	03-May-24	14-Aug-23	-190
		MPG Building - Close Out	40	08-May-23	30-Jun-23	24-Apr-23	-50
		Close Out	40	08-May-23	30-Jun-23	24-Apr-23	-50
		Marhsall Swing Site - Planning, Design, and Const	532	18-Dec-18 A	21-Jan-21	05-Oct-20	-74
		Phase 1: Marshall Renovation Summer 2020	19	30-Mar-20 A	24-Apr-20 A		
		Phase 3: Marshall Renvation Summer 2021	19	30-Mar-20 A	24-Apr-20 A		
		BOE Approval - Master Planning	119	18-Dec-18 A	07-Jun-19 A	07-Jun-19	0
		BOE Approval - GMP	80	28-Sep-20	21-Jan-21	07-Aug-20	-114
		A/E Team	30	28-Sep-20	10-Nov-20	29-May-20	-114
		FF&E Vendor	45	28-Sep-20	01-Dec-20	19-Jun-20	-114
		Design	272	02-Dec-19 A	22-Dec-20	05-Oct-20	-54
		Marhsall Swing Site - Construction	0	24-Aug-21	24-Aug-21	15-Jul-21	-28
		Substantial Completion	0	24-Aug-21	24-Aug-21	15-Jul-21	-28
		Marhsall Swing Site - Close Out	40	25-Aug-21	19-Oct-21	09-Sep-21	-28
		Close Out	40	25-Aug-21	19-Oct-21	09-Sep-21	-28
		Kenton Swing Site - Planning, Design, and Constru	572	18-Dec-18 A	18-Mar-21	05-Oct-20	-114
		BOE Approval - Master Planning	119	18-Dec-18 A	07-Jun-19 A	07-Jun-19	0
		BOE Approval - GMP	80	28-Sep-20	21-Jan-21	07-Aug-20	-114
		A/E Team	15	28-Sep-20	19-Oct-20	08-May-20	-114
		FF&E Vendor	45	28-Sep-20	01-Dec-20	19-Jun-20	-114
		Design	120	28-Sep-20	18-Mar-21	05-Oct-20	-114
		Permits	4	28-Sep-20	02-Oct-20	23-Apr-20	-114
		Kenton Swing Site - Construction	0	27-Aug-21	27-Aug-21	05-May-23	440
		Substantial Completion	0	27-Aug-21	27-Aug-21	05-May-23	440
		Kenton Swing Site - Close Out	40	30-Aug-21	22-Oct-21	30-Jun-23	440
		Close Out	40	30-Aug-21	22-Oct-21	30-Jun-23	440



Remaining Level of Effort | Baseline | Actual Work | Critical Remaining ...
Actual Level of Effort | Primary Baseline | Remaining Work | Milestone

TASK filter: -Responsibility.

© Oracle Corporation

Combined Project Cost Summary Report for Capital Improvement Bond Program **October 2020**

Project Name	Original Budget	Approved Budget Changes		Current Budget	Current Commitments	Estimate At Completion	Forecasted Over/(Under)	Actuals Approved
2012 Bond								
Franklin HS Modernization	81,585,655	30,875,627	1	112,461,282	112,332,978	112,461,282	-	112,332,978
Franklin - Teen Parent-Playground-Bond - 4833 - FY19	-	170,000	2	170,000	160,130	160,130	(9,870)	160,130
Franklin - Repairs - 5145 - FY20	-	398,245	3	398,245	464,199	398,245	-	428,371
Grant HS Modernization	88,336,829	70,533,488	4	158,870,317	158,714,287	158,870,317	-	156,024,562
Grant - Aux Gym-Batting Cages-Bond - 5311 - FY20	-	40,000	5	40,000	34,632	40,000	-	33,866
Grant - Gym-Lighting-Bond - 5337 - FY20	-	60,000	6	60,000	45,597	60,000	-	250
Grant - GHS Grant Bowl Improvements - 4919 - FY19	-	450,000	7	450,000	352,445	450,000	-	136,951
Roosevelt HS Modernization	68,418,695	32,367,036	8	100,785,731	100,785,732	100,785,731	-	100,185,876
Roosevelt - Modulars-relocated and store - 4435 - FY17	-	186,749	9	186,749	186,749	186,749	-	186,749
Roosevelt - Phase IV Modernization - 5171 - FY20	-	4,615,000	10	4,615,000	685,359	4,615,000	-	405,169
Roosevelt - Window Restoration - 5193 - FY20	-	1,193,882	11	1,193,882	1,159,621	1,193,882	-	1,043,451
Faubion Replacement	27,035,537	22,959,128	12	49,994,665	49,689,227	49,987,377	(7,288)	49,686,746
Faubion Add-Ons - 4918 - DA004 - FY19	-	125,000	13	125,000	122,276	125,000	-	120,961
Improvement Project 2013	9,467,471	2,495,669	14	11,963,140	11,963,139	11,963,140	-	11,963,139
Improvement Project 2014	13,620,121	4,191,667	15	17,811,788	17,811,788	17,811,788	-	17,811,788
Improvement Project 2015	13,521,066	102,076	16	13,623,142	13,497,438	13,497,438	(125,704)	13,497,438
Improvement Project 2015 - Maplewood	-	1,518,698	17	1,518,698	1,518,698	1,518,698	-	1,518,698
Improvement Project 2015 - SCI	-	2,057,686	18	2,057,686	2,057,686	2,057,686	-	2,057,686
Improvement Project 2016	15,274,437	1,386,346	19	16,660,783	16,405,180	16,405,275	(255,508)	16,405,180
GROUP 3 (IP 2017)	6,796,707	15,523,349	20	22,320,056	22,291,322	22,320,056	-	21,882,393
Improvement Project 2018	9,062,119	(9,062,120)	21	(1)	-	(1)	-	-
Improvement Project 2019	-	-	22	-	-	-	-	-
Master Planning - Benson HS	191,667	206,975	23	398,642	398,642	398,642	-	398,642
Master Planning - Cleveland HS	191,667	(191,667)	24	-	-	-	-	-
Master Planning - Jefferson HS	191,667	(191,667)	25	-	-	-	-	-
Master Planning - Lincoln HS	191,667	165,427	26	357,094	357,094	357,094	-	357,094
Master Planning - Madison HS	191,667	132,413	27	324,080	324,070	324,080	-	324,070
Master Planning - Wilson HS	191,667	(191,667)	28	-	-	-	-	-
Marshall Swing Site - Bond 2012	-	4,070,103	29	4,070,103	4,070,103	4,070,103	-	4,070,103
Tubman Swing Site - Bond 2012	-	1,164,776	30	1,164,776	1,164,776	1,164,776	-	1,164,776
Swing Sites & Transportation	9,550,000	(9,550,000)	31	-	-	-	-	-
Educational Specification	-	275,168	32	275,168	275,168	275,168	-	275,168
Debt Repayment	45,000,000	-		45,000,000	45,000,000	45,000,000	-	45,000,000
2012 Bond Program	93,181,361	(58,290,644)	33	34,890,717	32,079,455	34,273,816	(616,901)	26,839,719
	482,000,000	**119,786,742**		**601,786,742**	**481,614,814**	**488,310,189**	**(1,015,272)**	**471,978,976**

Project Name	Original Budget	Approved Budget Changes		Current Budget	Current Commitments	Estimate At Completion	Forecasted Over/(Under)	Actuals Approved
2017 Bond								
Benson HS Modernization	202,000,000	(148,347,500)	34	53,652,500	29,123,502	281,939,623	228,287,123	12,229,126
Benson HS Modernization - Kenton Swing Site-Mult Pathways - 5013	-	5,500,000	35	5,500,000	483,608	1,294,118	(4,205,882)	242,969
Benson HS Modernization - Marshall Swing Site - 5006	-	14,050,000	36	14,050,000	3,701,977	12,766,530	(1,283,470)	1,094,471
Benson HS Modernization - Mult Pathways to Graduation - 4999	-	5,500,000	37	5,500,000	4,943,320	61,727,729	56,227,729	326,618
Benson subtotal		*(123,297,500)*		*78,702,500*		*357,728,000*	*279,025,500*	
Lincoln HS Replacement	187,000,000	53,350,000	38	240,350,000	209,089,296	240,350,000	-	37,257,932
Multiple Sites - Athletic Swing Sites-Bond - 5206 - FY20	-	2,150,000	39	2,150,000	23,434	2,150,000	-	3,837
Lincoln subtotal		*55,500,000*		*242,500,000*		*242,500,000*	-	
Kellogg Replacement	45,000,000	14,811,150	40	59,811,150	53,865,736	59,811,150	-	42,833,583
Madison HS Modernization	146,000,000	56,016,189	41	202,016,189	188,963,884	202,016,190	-	103,813,892
	580,000,000	**3,029,839**		**583,029,839**	**490,194,757**	**862,055,340**	**279,025,500**	**197,802,426**
Benson HS Modernization: Pre-Design - Pre-Bond	-	561,725	42	561,725	561,725	561,725	-	561,725
Kellogg Replacement: Pre-Design - Pre-Bond	-	385,873	43	385,873	385,873	385,873	-	385,873
Lincoln HS Modernization: Pre-Design - Pre-Bond	-	378,557	44	378,557	378,557	378,557	-	378,557
Madison HS Modernization: Pre-Design - Pre-Bond	-	274,297	45	274,297	274,297	274,297	-	274,297
Cleveland HS Modernization-Pre-Design - Pre-Bond - 4964 - FY19	-	153,100	46	153,100	153,000	153,100	-	130,615
Jefferson HS Modernization-Pre-Design - Pre-Bond - 4965 - FY19	-	151,800	47	151,800	151,300	151,800	-	127,610
Wilson HS Modernization-Pre Design - Pre-Bond - 4966 - FY19	-	151,700	48	151,700	151,600	151,700	-	120,453
2017 Bond Program: Pre-Design - Pre-Bond	-	81,323	49	81,323	81,323	81,323	-	81,323
2017 Bond Program	210,000,000	(30,987,011)	50	179,012,989	37,887,710	107,233,785	(71,779,204)	26,782,011
	210,000,000	**(28,848,636)**		**181,151,364**	**40,025,385**	**109,372,160**	**(71,779,204)**	**28,842,465**
Beaumont - 2020 Asbestos Abatement-Bond - 5373 - FY20	-	243,041	51	243,041	221,862	243,041	-	168,800
Capitol Hill - 2020 Asbestos Abatement-Bond - 5275 - FY20	-	113,922	52	113,922	110,052	113,922	-	78,020
Chapman - 2020 Asbestos Abatement-Bond - 5377 - FY20	-	109,831	53	109,831	103,757	109,831	-	88,380
Chapman - Re-Roof - Bond Funded - 4671 - FY18	-	4,260,654	54	4,260,654	3,998,982	4,260,654	-	3,360,154
Creative Science - ADA Accommodation-Access Control - 5049 - FY20	-	12,855	55	12,855	33,514	12,855	-	33,514
GROUP 2 - Fire Alarm / Sprinkler	-	4,142,986	56	4,142,986	4,142,986	4,142,986	-	3,854,685
GROUP 4 - ASBESTOS	-	1,392,403	57	1,392,403	1,392,403	1,392,403	-	1,392,403
Harrison Park - Copy Room-Abate Asbestos Tile - 4664 - FY18	-	10,185	58	10,185	10,185	10,185	-	10,185
Harrison Park - K Classrooms-Abate Asbestos from floor tiles - 4441 - FY18	-	24,009	59	24,009	24,009	24,009	-	24,009
Harrison Park - Partial Re-Roof-Bond - 5321 - FY20	-	3,032,519	60	3,032,519	2,641,714	3,032,519	-	815,767
Hayhurst - SRGP-Bond - 5028 - FY19	-	4,423,500	61	4,423,500	4,206,490	4,423,500	-	4,075,437
Hosford - 2020 Asbestos Abatement-Bond - 5363 - FY20	-	253,168	62	253,168	236,477	253,168	-	73,365
Hosford - Wood Shop Floor-Asbestos - 4573 - FY18	-	41,523	63	41,523	41,523	41,523	-	41,523
Jackson - Health & Safety Improvements-Bond - 5030 - FY19	-	6,521,000	64	6,521,000	6,388,038	6,521,000	-	3,555,715
Jefferson - Camera-Pull Stations - 4528 - FY17	-	30,859	65	30,859	30,859	30,859	-	30,859
Jefferson - Fire Sprinkler Upgrades-Bond - 5053 - FY19	-	1,167,966	66	1,167,966	1,139,496	1,167,966	-	1,139,496
Kelly - Partial Re-Roof-Bond - 5319 - FY20	-	1,904,478	67	1,904,478	1,617,206	1,904,478	-	1,278,102
Lane - 2020 Asbestos Abatement-Bond - 5361 - FY20	-	134,159	68	134,159	126,819	134,159	-	86,334
Lee - Roof Repair - 4497 - FY18	-	97,000	69	97,000	97,000	97,000	-	97,000
Lent - Radon Mitigation - 4344 - FY17	-	59,512	70	59,512	59,512	59,512	-	59,512
Lent - SRGP Design - 5194 - FY20	-	46,000	71	46,000	28,040	28,040	(17,960)	27,540
Marysville - Radon Mitigation-Rms 137-138-139 - 4939 - FY20	-	21,334	72	21,334	18,284	21,334	-	8,901
Mt Tabor - Partial Re-Roof-Bond - 5320 - FY20	-	3,515,778	73	3,515,778	3,004,383	3,515,778	-	2,830,031
Multi-2018-4675-Bond-Security-PKG1 FY18-19	-	2,512,541	74	2,512,541	1,879,925	2,202,775	(309,766)	1,711,602
Multi-2018-5025-Bond-Security-PKG2-FY19	-	2,419,821	75	2,419,821	1,977,436	2,010,817	(409,004)	1,886,077
Multi-2018-5026-Bond-Security-PKG3-FY19	-	4,042,731	76	4,042,731	3,313,555	4,055,814	13,083	2,742,907
Multiple Sites - 2018-2019 Middle School Conversions - 4586-FY18	-	32,540,735	77	32,540,735	32,259,551	32,540,735	-	32,091,514
Multiple Sites - Asbestos Bond Projects-2018-19 - 4923 - FY19	-	1,254,069	78	1,254,069	1,254,069	1,254,069	-	1,254,069
Multiple Sites - Asbestos Bond Projects-2019-20 - 4924 - FY20	-	100,000	79	100,000	86,069	100,000	-	45,128

Multiple Sites - Day CPM Management Services - 4610 - FY18	-	-	80	-	-	-	-	-
Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 31 - 5301 - FY20	-	349,125	81	349,125	269,777	349,125	-	194,257
Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 32 - 5397 - FY20	-	342,136	82	342,136	244,552	342,136	-	-
Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Package 33 - 5398 - FY20	-	283,173	83	283,173	257,430	283,173	-	-
Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 34 - 5390 - FY21	-	354,142	84	354,142	-	354,142	-	-
Multiple Sites - Drinking Fixture Replacemnt Prog-Bid Pkg 35 - 5391 - FY21	-	355,960	85	355,960	-	355,960	-	-
Multiple Sites - Fire Alarm Equipment Purchase - FY15/16/17/18 - X0114	-	507,151	86	507,151	383,606	507,151	-	383,606
Multiple Sites - Fire Alarm Upgrades-North Group 1 - 5211 - FY20	-	1,952,500	87	1,952,500	1,767,528	1,952,500	-	1,177,166
Multiple Sites - Fire Alarm Upgrades-North Group 2 - 5212 - FY20	-	1,955,500	88	1,955,500	1,823,405	1,955,500	-	1,306,617
Multiple Sites - Fire Alarm Upgrades-South Group 3 - 5213 - FY20	-	1,539,763	89	1,539,763	1,383,719	1,539,763	-	734,557
Multiple Sites - Fire Alarm Upgrades-South Group 4 - 5214 - FY20	-	1,880,441	90	1,880,441	1,695,277	1,880,441	-	842,625
Multiple Sites - Floor Replacement-Bond Compensible - 4565 - FY18	-	124,841	91	124,841	124,841	124,841	-	124,841
Multiple Sites - Health & Safety Group 1 Design - 5153 - FY20	-	919,568	92	919,568	801,499	919,568	-	639,815
Multiple Sites - Health & Safety Group 2 Design - 5154 - FY20	-	1,137,400	93	1,137,400	1,021,781	1,137,400	-	820,649
Multiple Sites - Lead in Water Repairs - 4517 - FY17	-	7,129,459	94	7,129,459	2,966,093	2,966,093	(4,163,366)	2,484,138
Multiple Sites - Lead Paint Abatement - BOND	-	10,000,000	95	10,000,000	86,349	10,000,000	-	71,532
Multiple Sites - Lead Paint Abatement - Emergency Declaration - 4284 - FY17	-	1,273,501	96	1,273,501	1,273,500	1,273,501	-	1,273,500
Multiple Sites - Lead Paint Abatement - Fund 423 - 4493 -FY17	-	577,004	97	577,004	577,003	577,004	-	577,003
Multiple Sites - Radon Mitigation - 4609 - FY18	-	113,354	98	113,354	113,354	113,354	-	113,354
Ockley Green - Partial Re-Roof-Bond - 5322 - FY20	-	2,195,478	99	2,195,478	1,942,253	2,195,478	-	583,027
Rigler - 2020 Asbestos Abatement-Bond - 5369 - FY20	-	232,747	100	232,747	188,791	232,747	-	61,304
Rigler - Health & Safety Improvements-Bond - 5029 - FY19	-	9,817,000	101	9,817,000	9,716,664	9,817,000	-	8,994,066
Sitton - Health & Safety Improvements-Bond - 5027 - FY19	-	6,746,662	102	6,746,662	3,466,883	6,746,662	-	3,466,883
Stephenson - 2020 Asbestos Abatement-Bond - 5362 - FY20	-	154,289	103	154,289	134,575	154,289	-	51,538
Tubman - Roof Repairs- 4584 - OSM - FY18	-	11,740	104	11,740	9,980	11,740	-	9,980
Vernon - 2020 Asbestos Abatement-Bond - 5374 - FY20	-	100,005	105	100,005	94,084	100,005	-	73,209
Vestal - 2020 Asbestos Abatement-Bond - 5367 - FY20	-	214,550	106	214,550	211,370	214,550	-	181,485
Woodlawn - Partial Re-Roof-Bond - 5323 - FY20	-	1,915,886	107	1,915,886	1,672,252	1,915,886	-	562,553
Woodstock - 2020 Asbestos Abatement-Bond - 5368 - FY20	-	250,664	108	250,664	246,741	250,664	-	190,827
Woodstock - Hallway-Abate and replace floor tiles - 4738 - FY18	-	8,614	109	8,614	8,614	8,614	-	8,614
	-	**126,871,231**		**126,871,231**	**102,926,117**	**121,984,218**	**(4,887,013)**	**87,788,174**
	-	**101,052,434**		**891,052,434**	**633,146,259**	**1,093,411,718**	**202,359,283**	**314,433,065**
	-	**106,552,434**		**1,492,839,176**	**- 1,114,761,073**	**1,581,721,906**	**201,344,011**	**- 786,412,041**

changes from last meeting noted in green

	Budget Change Footnotes	To / From	Amt
1	Turf and 8th lane at Stadium Field	Cont CSM/COO	1,300,000
	Escalation (applied to current budget)	Cont Esc	5,858,911
	Traffic Engineering Services	Program Budget	(30,000)
	Transfer Admin budget from Projects to Program	Program Budget	(2,958,859)
	Increase Target Capacity to 1700	BOE Reserve	5,045,084
	Escalation (applied to BOE transfer)	Cont Esc	362,367
	Schematic Design Approval	Cont Esc	8,297,804
	Additional Criteria Financing	Cont CSM/COO	4,984,796
	ETO Energy Modeling Assistance	new source	17,000
	ETO Design Assistance	new source	2,500
	Div 01 Document Development	Program Budget	3,375
	SRPG	new source	1,337,218
	Great Fields Funds	new source	65,517
	e-Rate	Cont CSM/COO	698,400
	FAM Capital Funds	Fund 438	1,091
	Alumni Association	new source	90,000
	Oregon Sport Authority	new source	75,000
	FHS Boosters (stadium seating)	new source	18,000

	Transfer from program reserve	BOE Reserve	6,000,000	
	FAM Contribution for Scoreboard Upgrade	new source	23,091	
	ETO Incentive	new source	25,000	
	FAM Student Dishwasher Contribution	new source	3,936	
	ETO Incentive	new source	6,480	
	ETO Incentive	new source	39,934	
	ETO Estimate Correction	removed	(17,000)	
	Alumni Association refund	removed	(529)	
	South Grandstand Funds	Cont CSM/COO	315,315	
	Alumni Association	new source	561	
	ETO Incentive	new source	172,038	
	ETO Incentive	new source	30,937	
	RISK Contribution	new source	31,072	
	TEMPORARY BUDGET CHANGE TO FACILITATE CLOSE OUT. CORRECTION PENDING	Cont CSM/COO	100,000	
	ETO Incentive	new source	32,786	
	Transfer budget for Franklin Teen Parent Playground and Franklin Repairs	Cont CSM/COO	(428,245)	
	Transfer budget back to program for reallocation to FHS spin-offs	Cont CSM/COO	(627,954)	
			30,875,627	Franklin HS Modernization
2	Fund Franklin Teen Parent Playground (a Franklin spin-off project)	Cont OSM/COO	170,000	
			170,000	Franklin Teen Parent Playground
3	Fund Franklin Repairs (a Franklin spin-off project)	Cont OSM/COO	253,600	
	Fund Franklin Repairs (a Franklin spin-off project)	Cont OSM/COO	4,645	
	Fund Franklin Repairs (a Franklin spin-off project)	Cont OSM/COO	140,000	
			398,245	Franklin Repairs
3	Traffic Engineering Services	Program Budget	(30,000)	
	Transfer Admin budget from Projects to Program	Program Budget	(3,197,104)	
	Increase Target Capacity to 1700	BOE Reserve	(6,001,949)	
	Escalation	Cont Esc	10,143,276	
	Schematic Design Approval	Cont Esc	4,273,858	
	Escalation	Cont CSM/COO	12,705,525	
	Additional Criteria Financing	Cont CSM/COO	4,984,796	
	e-Rate	Cont CSM/COO	676,350	
	Schematic Design Approval	Cont CSM/COO	5,000,000	
	ETO Design Assistance	new source	2,500	
	ETO Incentive	new source	1,700	
	SRGP	new source	3,000,000	
	Additional Budget to Complete	Program Budget	26,890,507	
	ETO Incentive	new source	517	
	Additional Budget to Complete	BOE Reserve	4,000,000	
	Transfer PBOT Costs into GHS	Cont CSM/COO	900,705	
	Additional Budget to Complete	Program Budget	3,300,000	
	Move Contingency-COO to Grant DA001	Cont CSM/COO	3,806,750	
	ETO Incentive	new source	176,057	
	Transfer budget for Grant Batting Cages (a Grant spin-off project)	Grant Batting Cages	(40,000)	
	Transfer budget for Grant Gym Lighting (a Grant spin-off project)	Grant Batting Cages	(60,000)	
			70,533,488	Grant HS Modernization
5	Transfer budget for Grant Batting Cages (a Grant spin-off project)	Grant HS Mod	40,000	
			40,000	Grant Batting Cages
6	Transfer budget for Grant Gym Lighting (a Grant spin-off project)	Grant HS Mod	60,000	
			60,000	Grant Gym Lighting
7	Transfer Budget for GHS "Bowl" Planning	Cont CSM/COO	250,000	
	Transfer Budget for design	Cont CSM/COO	200,000	
			450,000	Grant Bowl Improvements

8	Escalation (applied to current budget)	Cont Esc	4,625,345	
	Traffic Engineering Services	Program Budget	(30,000)	
	Transfer Admin budget from Projects to Program	Program Budget	(2,469,033)	
	Increase Target Capacity to 1700	BOE Reserve	10,956,865	
	Escalation (applied to BOE transfer)	Cont Esc	740,882	
	Schematic Design Approval	Cont Esc	7,954,266	
	Additional Criteria Financing	Cont CSM/COO	2,000,261	
	Swing Site	Swing & Trans	2,594,000	
	e-Rate	Cont CSM/COO	426,150	
	Additional Swing Budget	Cont CSM/COO	1,400,000	
	ETO Design Assistance	new source	25,000	
	Transfer "first" portion of Maker Space Budget	Bond Premium	2,196,359	
	QZAB Funding	new source	4,000,000	
	ETO Design Assistance	new source	96,477	
	ETO Incentive	new source	327,349	
	Transfer final portion of Maker Space Budget	Bond Premium	2,803,641	
	ETO Incentive	new source	20,013	
	Mobile Medical Clinic Sale Proceeds	new source	625,000	
	Transfer Unused Maker Space Budget back to Program	Cont CSM/COO	(4,824,656)	
	Transfer budget for strategic plan design for RHS Phase IV	Roosevelt Ph IV	(115,000)	
	Transfer budget for Roosevelt window assessment	Roosevelt Windows	(100,000)	
	Transfer budget for Roosevelt window design	Roosevelt Windows	(100,000)	
	Transfer budget for Roosevelt window construction	Roosevelt Windows	(785,882)	
			32,367,036	Roosevelt HS Modernization
9	Modular Relocation Cost	Cont CSM/COO	186,749	
			186,749	RHS Modulars
10	Transfer budget for strategic plan design for RHS Phase IV	Roosevelt HS Mod	115,000	
	Transfer budget for full project per BOE	Cont CSM/COO	4,500,000	
			4,615,000	RHS Phase IV
11	Transfer budget for Roosevelt window assessment	Roosevelt HS Mod	100,000	
	Window design	Roosevelt HS Mod	100,000	
	Construction funds	Roosevelt HS Mod	785,882	
	Construction funds. To be re-paid by RHS Mod when project close-out complete.	Cont CSM/COO	208,000	
			1,193,882	RHS Window Replacement
12	Traffic Engineering Services	Program Budget	(30,000)	
	Transfer Admin budget from Projects to Program	Program Budget	(979,657)	
	Swing Site Funding (portable classrooms)	Swing & Trans	620,000	
	Concordia University (design contract)	new source	114,738	
	Escalation	Cont Esc	2,418,588	
	Swing Site Evaluation	Swing & Trans	36,000	
	Concordia University contribution	new source	15,510,000	
	Concordia University reconsiliation	out of program	(114,738)	
	e-Rate	Cont CSM/COO	229,950	
	Schematic Design Budget	Cont CSM/COO	4,000,000	
	Concordia University contribution	new source	29,710	
	Correction to CU contribution	removed source	(29,710)	
	Transfer moving budget	Cont CSM/COO	371,521	
	Additional Moving Costs from Tubman	Cont CSM/COO	28,928	
	Additional Budget to Complete	Fund 424	450,000	
	ETO Incentive	new source	85,834	
	ETO Incentive	new source	26,296	
	Allocate taxable interest	new source	82,554	
	TEMPORARY BUDGET CHANGE TO FACILITATE CLOSE OUT. CORRECTION ENTRY PENDII	Cont CSM/COO	50,000	
	Move Budget to Faubion Add-Ons	Faubion Add-Ons	(25,000)	
	Transfer funding for Concordia write-off	Cont CSM/COO	84,114	
			22,959,128	Faubion Replacement

13	Transfer Budget to Faubion Add-Ons	Cont CSM/COO	100,000	
	Budget increase for Faubion Construction	Cont CSM/COO	25,000	
			125,000	Faubion Add-Ons
14	State Rehabilitation Grant Program (SRGP)	Fund 438	1,500,000	
	SRGP PPS contribution	Fund 405	85,068	
	Budget adjustment (Contingency - COO)	Cont CSM/COO	2,223,190	
	FAM Capital Funds	Fund 438	4,010	
	FAM Capital Funds	Fund 438	448	
	Add Fund 405 Funds	Fund 405	546,441	
	Offset Fund 405 Funds via "roof" fund source	Cont CSM/COO	(546,441)	
	Increase scope (Ockley Green SL)	Cont CSM/COO	115,278	
	Energy Conservation (SB1149)	Fund 435	21,000	
	Solar roof study	Cont CSM/COO	32,350	
	Transfer Admin budget from Projects to Program	Program Budget	(385,977)	
	Fund 405 reconciliation	Cont CSM/COO	62,560	
	Fund 405 reconciliation	out of program	(62,560)	
	Transfer budget savings	Cont CSM/COO	(1,000,000)	
	Transfer budget savings	Cont CSM/COO	(93,537)	
	Transfer budget savings	Cont CSM/COO	(6,161)	
			2,495,669	IP 2013
15	Reallocation of IP scope of work	Cont CSM/COO	(13,558,581)	
	Reallocation of IP scope of work	Cont CSM/COO	14,938,982	
	Solar roof study	Cont CSM/COO	67,135	
	Escalation allocation	Cont Escalation	**493,462**	
	Transfer Admin budget from Projects to Program	Program Budget	(604,195)	
	Add SB1149 funds	new resources	780,810	
	Add Beach elevator scope	Cont CSM/COO	411,036	
	Escalation	Cont Esc	58,029	
	Construction bids	Cont CSM/COO	3,000,000	
	Transfer budget savings	Cont CSM/COO	(1,100,000)	
	Project Close Out	Cont CSM/COO	(295,011)	
			4,191,667	IP 2014
16	Reallocation of IP scope of work	Cont CSM/COO	(13,521,066)	
	Reallocation of IP scope of work	Cont CSM/COO	13,887,403	
	Transfer Admin budget from Projects to Program	Program Budget	(559,361)	
	Remove Beach elevator scope	Cont CSM/COO	(411,036)	
	Reallocation of IP scope of work	Cont CSM/COO	(12,917,006)	
	Reallocation of IP scope of work	Cont CSM/COO	11,803,551	
	Escalation	Cont Esc	733,908	
	Add SB1149 funds	new resources	804,205	
	FAM - skylights	new resources	60,000	
	Verizon design support	new resources	7,478	
	Fall Protection Design	new resources	39,000	
	Transfer budget to cover unforeseen costs	Cont CSM/COO	175,000	
			102,076	IP 2015
17	Initial project set up	Cont CSM/COO	1,122,050	
	Escalation	Cont Esc	122,477	
	Construction bid delta	Cont CSM/COO	400,000	
	Project Close Out	Cont CSM/COO	(125,829)	
			1,518,698	IP 2015 Maplewood
18	Reallocation of IP scope of work	Cont CSM/COO	2,048,500	
	Reallocation of IP scope of work	Cont CSM/COO	382,134	
	Escalation	Cont Esc	151,129	
	Remove Holladay Annex scope	Cont CSM/COO	(39,610)	
	Project Close Out	Cont CSM/COO	(484,467)	

			2,057,686	IP 2015 SCI
19	Reduced scope (Ockley Green SL)	Science Labs	(115,278)	
	Reallocation of IP scope of work	Cont CSM/COO	(15,159,159)	
	Reallocation of IP scope of work	Cont CSM/COO	7,483,385	
	Transfer Admin budget from Projects to Program	Program Budget	(301,418)	
	Reallocation of IP scope of work	Cont CSM/COO	(7,181,967)	
	Reallocation of IP scope of work	Cont CSM/COO	12,319,254	
	Reallocation of IP scope of work	Cont CSM/COO	(12,319,254)	
	Reallocation of IP scope of work	Cont CSM/COO	11,439,840	
	Escalation	Cont CSM/COO	1,950,943	
	Grout window restoration	Cont CSM/COO	175,000	
	Construction bid delta	Cont CSM/COO	2,500,000	
	Transfer funds to cover anticipated expenses	Cont CSM/COO	175,000	
	Transfer funds to cover anticipated expenses	Cont CSM/COO	150,000	
	Transfer funds to cover anticipated expenses	Cont CSM/COO	270,000	
			1,386,346	IP 2016
20	Reallocation of IP scope of work	Cont CSM/COO	(6,796,708)	
	Reallocation of IP scope of work	Cont CSM/COO	13,782,466	
	Transfer Admin budget from Projects to Program	Program Budget	(555,134)	
	Reallocation of IP scope of work	Cont CSM/COO	(13,227,332)	
	Reallocation of IP scope of work	Cont CSM/COO	10,192,356	
	Removed Maplewood Roof Scope	Cont CSM/COO	(1,122,050)	
	Reallocation of IP scope of work	Cont CSM/COO	(9,070,306)	
	Reallocation of IP scope of work	Cont CSM/COO	10,225,934	
	Add SRGP Funds - Lewis	new source	333,621	
	Transfer fall protection budget	Cont CSM/COO	1,000,000	
	Remove Benson scope of work	Cont CSM/COO	(1,326,691)	
	Remove (original) SRGP Funds - Lewis	remove	(333,621)	
	Add (new) SRGP Funds - Lewis	new source	1,500,000	
	Remove scope of "postponed" work	Cont CSM/COO	(8,243,934)	
	Transfer 2017 Bond H&S Scope of work	H&S	38,212,384	
	Add Budget to Cover Lewis Seismic Work	Cont CSM/COO	100,000	
	Transfer Winterhaven funds back to 2017 H&S	H&S	(11,068,781)	
	Transfer from Program To Project	Cont CSM/COO	80,000	
	Transfer from Asbestos	H&S	449,194	
	Program Add to Roofing	Cont CSM/COO	30,000	
	Transfer Roof to Rigler & Jackson	H&S	(9,199,104)	
	Request for DS100 Funds	H&S	359,334	
	Request for DS100 Funds	Cont CSM/COO	35,000	
	Transfer from Asbestos & Roofing for Jackson, from Fire Al/Sp for Rigler	H&S	166,721	
			15,523,349	GROUP 3
21	Reallocation of IP scope of work	Cont CSM/COO	(9,062,120)	
	Reallocation of IP scope of work	Cont CSM/COO	8,005,396	
	Transfer Admin budget from Projects to Program	Program Budget	(322,444)	
	Reallocation of IP scope of work	Cont CSM/COO	(7,682,952)	
	Reallocation of IP scope of work	Cont CSM/COO	2,314,069	
	Reduce scope of work	Cont CSM/COO	(1,785,187)	
	Reallocation of IP scope of work	Cont CSM/COO	(528,882)	
	Reallocation of IP scope of work	Cont CSM/COO	642,311	
	Add Benson scope of work	Cont CSM/COO	1,326,691	
	Remove all Funding	Cont CSM/COO	(1,969,002)	
			(9,062,120)	IP 2018
22	Reallocation of IP scope of work	Cont CSM/COO	1,949,393	
	Reduce scope of work	Cont CSM/COO	(1,285,755)	
	Reallocation of IP scope of work	Cont CSM/COO	(663,638)	
	Reallocation of IP scope of work	Cont CSM/COO	273,995	
	Remove all Funding	Cont CSM/COO	(273,995)	

			-	IP 2019
23	Traffic Engineering Services	Program Budget	(30,000)	
	Consolidate master planning	Cont CSM/COO	161,667	
	Master Planning budget increase	Cont CSM/COO	176,666	
	Project Closeout	Cont CSM/COO	(101,358)	
			206,975	MP Benson
24	Traffic Engineering Services	Program Budget	(30,000)	
	Consolidate master planning	Cont CSM/COO	(161,667)	
			(191,667)	MP Cleveland
25	Traffic Engineering Services	Program Budget	(30,000)	
	Consolidate master planning	Cont CSM/COO	(161,667)	
			(191,667)	MP Jefferson
26	Traffic Engineering Services	Program Budget	(30,000)	
	Consolidate master planning	Cont CSM/COO	161,667	
	Master Planning budget increase	Cont CSM/COO	76,666	
	Project Closeout	Cont CSM/COO	(42,906)	
			165,427	MP Lincoln
27	Traffic Engineering Services	Program Budget	(30,000)	
	Consolidate master planning	Cont CSM/COO	161,667	
	Master Planning budget increase	Cont CSM/COO	76,666	
	Move unused funding to COO Contingency	Cont CSM/COO	(75,920)	
			132,413	MP Madison
28	Traffic Engineering Services	Program Budget	(30,000)	
	Consolidate master planning	Cont CSM/COO	(161,667)	
			(191,667)	MP Wilson
29	Allocate budget to project (Marshall)	Swing & Trans	4,000,000	
	Reduce budget to remove field improvements	Swing & Trans	(1,500,000)	
	Allocate budget to project (Marshall)	Swing & Trans	1,500,000	
	ETO funds	new resource	9,080	
	Allocate budget to cover current costs	Cont CSM/COO	350,000	
	Allocate budget to cover current costs	Cont CSM/COO	250,000	
	Project Closeout	Cont CSM/COO	(529,885)	
	Project Closeout	Cont CSM/COO	(9,092)	
			4,070,103	Marshall Swing
30	Initial project set up	Swing & Trans	2,300,000	
	Fire Sprinklers	new resoure	35,000	
	Transfer moving budget	Cont CSM/COO	(371,521)	
	Project Closeout	Cont CSM/COO	(798,703)	
			1,164,776	Tubman Swing
31	Allocate budget to project (Marshall)	Marshall	(4,000,000)	
	Reduce budget to remove field improvements	Marshall	1,500,000	
	Swing Site Funding (portable classrooms)	Faubion	(620,000)	
	Allocate budget to project (Marshall)	Marshall	(1,500,000)	
	Swing Site Evaluation	Faubion	(36,000)	
	Allocate budget to project (Tubman)	Tubman	(2,300,000)	
	Allocate budget to project (RHS)	Roosevelt	(2,594,000)	
			(9,550,000)	Swing Sites
32	Educational Specification	Fund 405	300,000	
	Project Close Out	Cont CSM/COO	(24,832)	

			275,168	Ed Spec
33	see 2012 Bond Program Budget Detail on next page		**(58,290,644)**	2012 Bond
34	Transfer Funds for Middle School Conversion (Resolution 5632)	Middle School Convers	(3,793,310)	
	Transfer Funds per Master Plan Approval (LHS & MHS)	Cont CSM/COO	(116,086,619)	
	Transfer Funds to Support Kellogg	Cont CSM/COO	(14,797,500)	
	CET funds per BOE Resolution 5737	new source	11,379,929	
	Transfer Benson funds to break out Kenton Swing into separate eBuilder project	Benson: Kenton Swing	(5,500,000)	
	Transfer Benson funds to break out Marshall Swing into separate eB project	Benson: Marshall Swin	(14,050,000)	
	Transfer Benson funds to break out MPG into separate eBuilder project	Benson: MPG	(5,500,000)	
			(148,347,500)	Benson Mod
35	Transfer Benson funds to break out Kenton Swing into separate eBuilder project	Benson Mod	5,500,000	
			5,500,000	Benson: Kenton Swing
36	Transfer Benson funds to break out Marshall Swing into separate eB project	Benson Mod	14,050,000	
			14,050,000	Benson: Marshall Swing
37	Transfer Benson funds to break out MPG into separate eBuilder project	Benson Mod	5,500,000	
			5,500,000	Benson: MPG
38	Transfer Funds for Middle School Converstion (Resolution 5632)	Middle School Convers	(3,793,310)	
	Transfer Funds per Master Plan Approval	Cont CSM/COO	59,293,310	
	Split out Athletic Swing Sites to separate eBuilder project	Athletic Swing Sites	(2,150,000)	
			53,350,000	Lincoln HS Replace
39	Split out LHS Athletic Swing Sites into separate eBuilder project	Lincoln HS Replace	2,150,000	
			2,150,000	LHS Athletic Swing Sites
40	ETO Incentive	new source	2,500	
	Transfer Additional Budget	Cont CSM/COO	14,797,500	
	ETO Incentive	new source	11,150	
			14,811,150	Kellogg MS Replace
41	Transfer Funds for Middle School Converstion (Resolution 5632)	Middle School Convers	(3,793,310)	
	Transfer Funds per Master Plan Approval	Cont CSM/COO	56,793,309	
	Madison ETO	new source	2,500	
	Madison SRGP	new source	2,500,000	
	ODOT funding	new source	510,250	
	Madison ETO	new source	3,440	
			56,016,189	Madison HS Mod
42	Initial Budget	General Fund (Fund 42	800,000	
	Project Closeout	General Fund (Fund 42	(238,275)	
			561,725	Benson Pre-Des
43	Initial Budget	General Fund (Fund 42	400,000	
	Project Closeout	General Fund (Fund 42	(14,127)	
			385,873	Kellogg Pre-Des
44	Initial Budget	General Fund (Fund 42	400,000	
	Project Closeout	General Fund (Fund 42	(21,443)	
			378,557	Lincoln Pre-Des
45	Initial Budget	General Fund (Fund 42	400,000	
	Project Closeout	General Fund (Fund 42	(125,703)	
			274,297	Madison Pre-Des

46	Initial Budget	2017 Bond Program	100,000	
	Allocate budget for cost estimating support	2017 Bond Program	28,500	
	Additional funds for geotech, title, survey	2017 Bond Program	12,600	
	Additional funds for structural cost estimating support	2017 Bond Program	12,000	
			153,100	Cleveland Pre-Des
47	Initial Budget	2017 Bond Program	100,000	
	Allocate budget for cost estimating support	2017 Bond Program	28,500	
	Additional funds for geotech, title, survey	2017 Bond Program	11,300	
	Additional funds for structural cost estimating support	2017 Bond Program	12,000	
			151,800	Jefferson Pre-Des
48	Initial Budget	2017 Bond Program	100,000	
	Allocate budget for cost estimating support	2017 Bond Program	28,500	
	Additional funds for geotech, title, survey	2017 Bond Program	11,200	
	Additional funds for structural cost estimating support	2017 Bond Program	12,000	
			151,700	Wilson Pre-Des
49	Initial Budget	General Fund (Fund 42	750,000	
	Project Closeout	General Fund (Fund 42	(668,677)	
			81,323	2017 Bond Pre-Des
50	see 2017 Bond Program Budget Detail on next page		**(30,987,011)**	2017 Bond
51	Initial Budget	H&S Asbestos	220,941	
	Add contingency	H&S Asbestos	22,100	
			243,041	Beaumont - 2020 Asbestos
52	Initial Budget	H&S Asbestos	42,300	
	Align Budget with current scope	H&S Asbestos	71,622	
			113,922	Capitol Hill - 2020 Asbestos
53	Initial Budget	H&S Asbestos	102,486	
	Add contingency	H&S Asbestos	7,345	
			109,831	Chapman - 2020 Asbestos
54	Initial Budget	H&S - Roof & Fire	3,801,000	
	Remove Fire Sprinkler Scope	H&S - Fire	(959,000)	
	Increase for construction	H&S Roof	1,418,654	
			4,260,654	Chapman Re-Roof
55	Bond-funded security improvements added to FAM project	Security Pkg 2	12,855	
			12,855	Creative Science
56	Initial Budget (H&S FIRE)	H&S - Fire	2,000,000	
	Align Budget with current scope	H&S - Fire	6,533,136	
	Close out of project	H&S - Fire	(4,390,150)	
			4,142,986	Group 2
57	Initial Budget (H&S ASBESTOS)	H&S Asbestos	1,000,000	
	Align Budget with current scope	H&S Asbestos	2,033,661	
	Close out of project	H&S Asbestos	(1,641,258)	
			1,392,403	Group 4
58	Bond eligible reimbursement	H&S Asbestos	10,185	
			10,185	Harrison Park Copy Rm
59	Bond eligible reimbursement	H&S Asbestos	24,009	
			24,009	Harrison Park K Class

60	Initial Budget (H&S ROOF)	H&S Roof	2,987,519	
	Initial Budget (H&S ADA)	H&S ADA	45,000	
			3,032,519	Harrison Park Partial Re-Roof
61	State Rehabilitation Grant Program (SRGP)	Fund 438	2,500,000	
	Increase Budget for Overall Project	H&S Roof	1,923,500	
			4,423,500	Hayhurst
62	Initial Budget	H&S Asbestos	90,652	
	Align Budget with current scope	H&S Asbestos	137,516	
	Add budget for unforeseen conditions	H&S Asbestos	25,000	
			253,168	Hosford - 2020 Asbestos
63	Bond eligible reimbursement	H&S Asbestos	41,523	
			41,523	Hosford - Wood Shop Floor-Asbestos
64	Jackson Consolidated Project Budget	H&S Roof	6,521,000	
	Consultant charges for unforeseen asbestos scope	H&S Asbestos	66,361	
	Consultant charges for additional roofing related to unforeseen hazmat	H&S Roof	66,360	
	Reverse two budget transfers that should have gone to Group 3	H&S Roof, Asbestos	(132,721)	
			6,521,000	Jackson Consolidated
65	Bond eligible reimbursement	H&S - SECURITY	30,859	
			30,859	Jefferson Camera-Pull
66	Transfer Sprinkler Funds to Jefferson	H&S - Fire	1,147,966	
	Increase for unforeseen inspector requirements	H&S - Fire	20,000	
			1,167,966	Jefferson Fire Sprinklers
67	Initial Budget	H&S - Roof	1,904,478	
			1,904,478	Kelly Partial Re-Roof
68	Initial Budget	H&S Asbestos	85,900	
	Align Budget with current scope	H&S Asbestos	40,669	
	Add contingency	H&S Asbestos	7,590	
			134,159	Lane - 2020 Asbestos
69	Bond eligible reimbursement	2017 Bond Program	96,750	
	CET Lee Roof Repair	new source	250	
			97,000	Lee Roof
70	Bond eligible reimbursement	H&S - RADON	38,938	
	FAM Funds	General Fund	20,574	
			59,512	Lent Radon
71	Original budget for Lent SRGP Design	2017 Bond Program	46,000	
			46,000	Lent SRGP
72	Original budget for Marysville Radon	H&S - RADON	21,334	
			21,334	Marysville Radon
73	Initial Budget	H&S - Roof	3,515,778	
			3,515,778	Mt Tabor Partial Re-Roof
74	Original Budget for security assessment	H&S Security	13,000	
	Change to Budget for Bid Walks	H&S Security	2,040	
	Change to Budget Multiple Sites Security	H&S Security	3,047,709	
	Return unneeded funds to Unallocated	H&S Security	(550,208)	
			2,512,541	Security Pkg 1

75	Original Budget Security PKG2	H&S Security	2,962,599	
	Bond-funded security improvements added to FAM project	Creative Science	(12,855)	
	Return unneeded funds to Unallocated	H&S Security	(529,923)	
			2,419,821	Security Pkg 2
76	Original Budget Security PKG3	H&S Security	2,962,600	
	Add funding to Pkg 3 based on bid	H&S Security	1,080,131	
			4,042,731	Security Pkg 3
77	Initial Budget	General Fund	11,806,094	
	Transfer budget to Middle School Conversion	H&S	9,001,461	
	Adjust budget	General Fund	(400,000)	
	Reallocation of Middle Schools Budget	2017 Bond Program	(493,014)	
	Transfer Funds for Middle School Converstion (Resolution 5632)	BPHS/LHS/MHS	11,379,729	
	Add'l Roof Scope	H&S - Roof	72,090	
	Add'l Security Scope	H&S - Security	67,439	
	Add'l FAM Budget	General Fund	600,000	
	Add'l H&S Scope	H&S	506,937	
			32,540,735	Middle School Conversion
78	Initial Budget	H&S Asbestos	500,000	
	Transfer Budget for Asbestos Bond Projects	H&S Asbestos	810,000	
	Adjust Budget for Multi Sites Asbestos	H&S Asbestos	80,000	
	Budget Increase for asbestos abatement	H&S Asbestos	10,000	
	Close out of project	H&S Asbestos	(145,931)	
			1,254,069	Asbestos FY18-19
79	Initial Budget	H&S Asbestos	100,000	
			100,000	Asbestos FY19-20
80	Initial Budget	General Fund	230,000	
	Project & Construction MGMT	2017 Bond Program	650,000	
	Request for Reimbursement	General Fund	199,943	
	Remove General Fund Contribution	General Fund	(230,000)	
	Contract Amendment	2017 Bond Program	1,127,330	
	Move budget to 2017 Program	2017 Bond Program	(1,977,273)	
			-	Day CPM Mgmt
81	Initial Budget	H&S - Water	349,125	
			349,125	Drinking Fixture Repl-Pkg 31
82	Initial Budget	H&S - Water	342,136	
			342,136	Drinking Fixture Repl-Pkg 32
83	Initial Budget	H&S - Water	283,173	
			283,173	Drinking Fixture Repl-Pkg 33
84	Initial Budget	H&S - Water	354,142	
			354,142	Drinking Fixture Repl-Pkg 34
85	Initial Budget	H&S - Water	355,960	
			355,960	Drinking Fixture Repl-Pkg 35
86	Bond eligible reimbursement	H&S - Fire	46,523	
	FAM Funds	General Fund	460,628	
			507,151	Fire Alarm Equip Purchase
87	Initial Budget	H&S - Fire	1,952,500	
			1,952,500	Fire Alarm - North Group 1

88	Initial Budget	H&S - Fire	1,955,500	
			1,955,500	Fire Alarm - North Group 2
89	Initial Budget	H&S - Fire	1,539,763	
			1,539,763	Fire Alarm - South Group 3
90	Initial Budget	H&S - Fire	1,880,441	
			1,880,441	Fire Alarm - South Group 4
91	Bond eligible reimbursement	H&S - ASBESTOS	101,044	
	FAM Funds	General Fund	180,000	
	Reduce Budget and Close Fam Funds	General Fund	(156,203)	
			124,841	Floor Replacement
92	Initial Budget	H&S - ROOF	919,568	
			919,568	Group 1 Design
93	Initial Budget	H&S - ROOF	1,137,400	
			1,137,400	Group 2 Design
94	Initial Budget	General Fund	885,000	
	Additional Funds	H&S - WATER	204,096	
	Additional Funds	H&S - WATER	1,247,263	
	Additional Funds	H&S - WATER	669,396	
	Reduce FAM Funds	General Fund	(876,296)	
	Additional Funds	H&S - WATER	5,000,000	
			7,129,459	Lead in Water
95	Initial Budget	H&S - PAINT	10,000,000	
	Portland Water Bureau Grant	new resource	50,000	
			10,050,000	Lead Paint BOND
96	Bond eligible reimbursement	H&S - PAINT	377,266	
	FAM Funds	General Fund	909,297	
	Additional Funds	H&S - Paint	7,914	
	Reduce FAM Funds	General Fund	(20,976)	
			1,273,501	Lead Paint Emergency
97	Initial Budget	General Fund	138,209	
	Additional Funds	H&S - PAINT	438,795	
			577,004	Lead Paint Fund 423
98	Bond eligible reimbursement	H&S - RADON	110,875	
	FAM Funds	General Fund	129,125	
	Reduce FAM Funds	General Fund	(9,085)	
	Reduce Budget and Close	H&S Radon	(117,561)	
			113,354	Mult Sites - Radon
99	Initial Budget (H&S Roof)	H&S - Roof	2,150,478	
	Initial Budget (H&S ADA)	H&S - ADA	45,000	
			2,195,478	Ockley Green Partial Re-Roof
100	Initial Budget	H&S - Asbestos	41,480	
	Align budget with current scope	H&S - Asbestos	131,267	
	Transfer budget for added scope	H&S - Asbestos	60,000	
			232,747	Rigler - 2020 Asbestos
101	Original Budget - Roof	H&S - Roof	8,158,000	
	Consultant services for add sprinkler scope per Fire Marshall	H&S - FIRE	34,000	

	Reverse budget transfer on incorrect project	H&S - FIRE	(34,000)	
	Add funding for new fire sprinkler requirement by AHJ	H&S - FIRE	1,659,000	
	Return unneeded Fire Alarm/Sprinkler funds	H&S - FIRE	(137,675)	
	Return unneeded Roof funds	H&S - Roof	(150,000)	
	Add ADA funding for unforeseen elevator conditions	H&S - ADA	287,675	
			9,817,000	Rigler Consolidated
102	Initial Budget	H&S - Roof	1,000,000	
	Sitton Consolidated Project Budget - Roof	H&S - Roof	6,433,000	
	Transfer OSCIM grant funds in for expense reimbursement	H&S - OSCIM	3,277,779	
	Transfer to Unallocated Roofs	H&S - Roof	(3,277,779)	
	Close out of project	H&S - Roof	(686,338)	
			6,746,662	Sitton Consolidated
103	Initial Budget	H&S - Asbestos	65,555	
	Align budget with current scope	H&S - Asbestos	88,734	
			154,289	Stephenson - 2020 Asbestos
104	Initial Budget - CET funds	CET funding	11,740	
			11,740	Tubman Roof
105	Initial Budget	H&S - Asbestos	90,905	
	Add contingency	H&S - Asbestos	9,100	
			100,005	Vernon - 2020 Asbestos
106	Initial Budget	H&S - Asbestos	153,910	
	Align budget with current scope	H&S - Asbestos	45,250	
	Add contingency	H&S - Asbestos	15,390	
			214,550	Vestal - 2020 Asbestos
107	Initial Budget (H&S Roof)	H&S - Roof	1,870,886	
	Initial Budget (H&S ADA)	H&S - ADA	45,000	
			1,915,886	Woodlawn Partial Re-Roof
108	Initial Budget	H&S - Asbestos	94,970	
	Align budget with current scope	H&S - Asbestos	155,694	
			250,664	Woodstock - 2020 Asbestos
109	Initial Budget	H&S - ABATEMENT	8,614	
			8,614	Woodstock Hallway Abate

PORTLAND PUBLIC SCHOOLS

OFFICE OF SCHOOL MODERNIZATION

501 North Dixon Street / Portland, OR 97227
Telephone: (503) 916-2222

Date: December 10, 2020

To: School Improvement Bond Committee

From: Marina Cresswell, Senior Director, Office of School Modernization

Subject: OSM Quarterly Report

BACKGROUND

In November 2012 and May 2017 voters approved general obligation bonds to complete capital improvement projects for Portland Public Schools. The District's Office of School Modernization staff has developed a set of performance measures to provide management information for the staff and reporting tools for the Bond Accountability Committee and the Board's oversight role. Performance metrics for the 2012/2017 bond program are based on the Balanced Scorecard (BSC).

RELATED POLICIES/BEST PRACTICES

The provided documentation includes metrics tracking the performance of the District's Equity in Public Purchasing and Contracting Policy.

ANALYSIS OF SITUATION

The bond program continues to make progress planning, designing and completing capital improvements. The attached documentation provides an overview of recent accomplishments and current status.

FISCAL IMPACT

The current combined (2012/2017) program budget is $1.5 billion. The provided documentation includes detailed financial information.

COMMUNITY ENGAGEMENT

The bond program continues to engage internal and external stakeholders through public workshops, targeted project meetings, open houses, etc. Design Advisory Groups are active for Benson and MPG.

TIMELINE FOR IMPLEMENTATION / EVALUATION

The provided information includes detailed project schedule information.

BOARD OPTIONS WITH ANALYSIS

N/A

CONNECTION TO BOARD GOALS

N/A

STAFF RECOMMENDATION

N/A

As a member of the PPS Executive Leadership Team, I have reviewed this staff report.

CH
_____ (Initials)

ATTACHMENTS (from 11/04/20 Bond Accountability Committee Meeting)

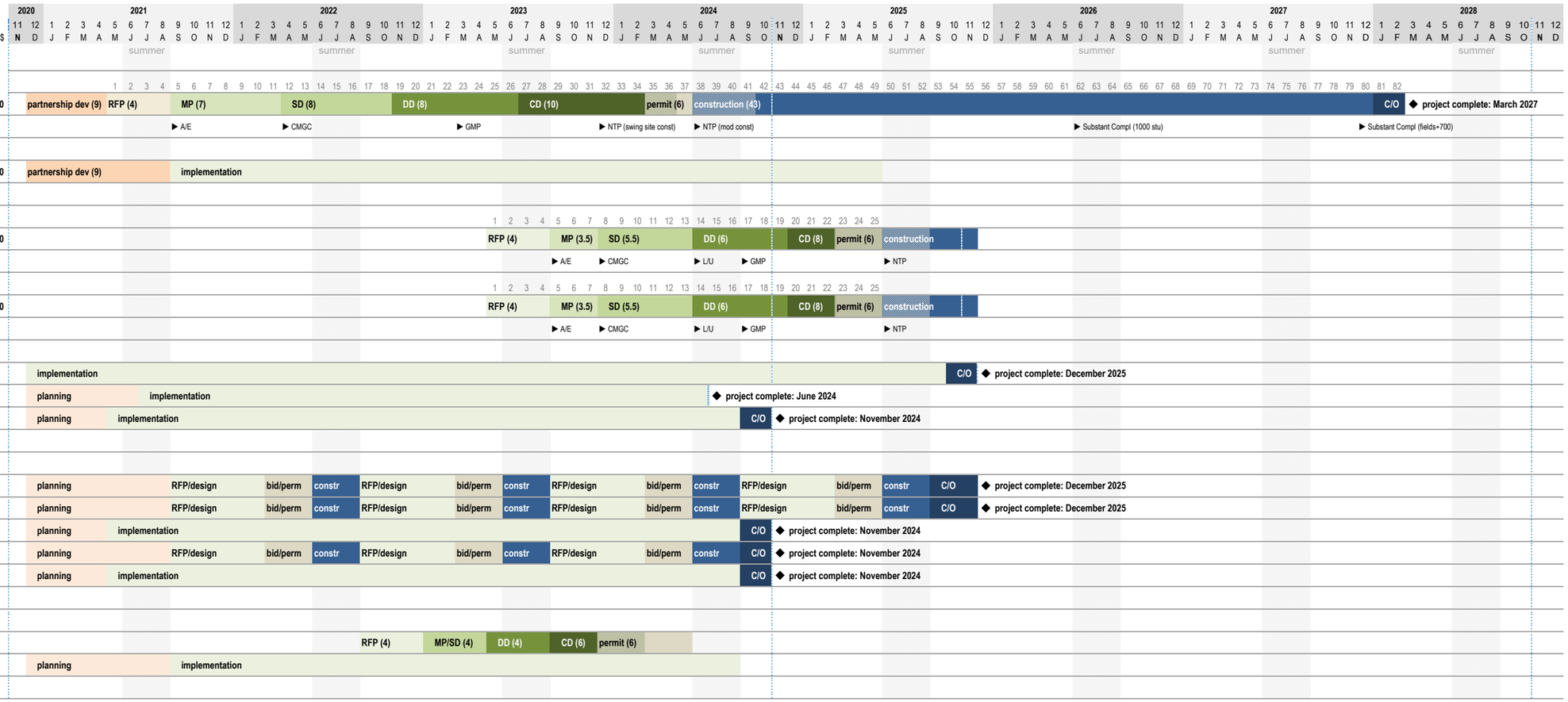
A. Bond Accountability Committee Meeting Minutes
B. Bond Accountability Committee Meeting Materials
C. Project Management Cost Summary
D. 2012 Program Cost Summary
E. 2017 Program Cost Summary
F. Health and Safety Costs
G. Balanced Scorecards
H. Project Schedules
I. Performance Audit Tracker
J. Benson Business Equity Presentation

GO Bond Conceptual Schedule

DRAFT DRAFT

Updated: 12/7/2020

	length	$
JEFFERSON	82 months	311,000,000
CENTER FOR BLACK STU	54 months	60,000,000
CLEVELAND	25 months	20,000,000
WILSON	25 months	20,000,000
EDUCATIONAL IMPROVEMENTS		
Technology		
Curriculum		
SPED Classrooms		
PHYSICAL FACILITY IMPROVEMENTS		
Roof		
Mechanical		
Security		
Seismic		
ADA		
CAPACITY		
RHS Phase V		
Other		



Bond Execution Plan

2020 Capital Improvement Bond

DRAFT 12/7/2020

Portland Public Schools (District) is charged with overall execution of the $1.2B capital construction bond program (2020 Bond Program) approved by voters on November 3, 2020. The Office of School Modernization (OSM) will be responsible for managing the 2020 Bond Program under the direction of the Chief Operating Officer and Superintendent. The majority of the 2020 Bond Program projects are planned to be completed by the end of 2025 (one notable exception being the Jefferson High School Modernization project, which is anticipated to be fully complete in 2028). Construction activities will be planned and executed to minimize disruption to students and staff and ensure safety at all times. OSM project teams will be responsible for organizing and executing Modernization, Physical Facility Improvement, and Educational Improvement/SPED Learning Environment projects through the complete project lifecycle: planning, design, bid, and construction & post occupancy phases as appropriate. The Office of Technology and Information Services (OTIS) will be responsible for project-level organization and execution of Educational Improvement/Technology projects. The Office of Teaching & Learning (OTL) will be responsible for project-level organization and execution of Educational Improvement/Curriculum projects. OSM will maintain ultimate responsibility for financial oversight, tracking, and record keeping, as well as performance audit review and reporting to oversight bodies, for the Technology and Curriculum portions of the Educational Improvements, in addition to OSM's oversight of the remainder of the 2020 Bond Program. OSM, OTIS and OTL will engage stakeholders to help shape and inform project organization, design and execution, with stakeholders including building level staff and students, District departments, District administrators, and the outside community.

DRAFT

2020 Bond Scope of Work

The 2020 Bond Program includes the following scope of work:

Modernizations	
2017 Bond Balance	$152,000,000
MPG Building	$64,000,000
Jefferson	$311,000,000
Center for Black Student Excellence	$60,000,000
Cleveland - Planning & Design	$20,000,000

Wilson - Planning & Design	$20,000,000
Roosevelt - Planning & Design	$2,000,000
Capacity	$10,000,000
Educational Improvements	
Technology	$128,200,000
Curriculum	$53,444,000
SPED Learning Environments	$13,400,000
Physical FacilityImprovements	
Roof	$65,700,000
Mechanical	$75,000,000
Security	$25,900,000
Seismic	$17,200,000
ADA	$33,800,000
Contingency & Administration	
Administration	$63,098,640
Contingency	$93,257,360
TOTAL	**$1,208,000,000**

Funds for **2017 Bond Balance** will be used to complete the 2017 Bond Program, in particular the completion of the modernization of Benson High School. The Benson High School Modernization project is partially funded by the 2017 Bond Program, and will have completed design through to permit documents by December 2020, with funding remaining in the 2017 Bond Program to pay for construction costs through the end of 2021. The remaining project costs will be paid for by the 2020 Bond Program.

DRAFT

The Multiple Pathways to Graduation Program will be located in a new, separate building located on the Benson High School campus. The purpose of the **MPG Building** is to accommodate the existing Multiple Pathways to Graduation programs that are currently operating within Benson High School, including Alliance, Reconnection Services, and DART/Clinton. It will also include the relocation of the Alliance program at Meek to the MPG building. The modernization of the existing Benson High School main building does not include bringing these programs back into the main building, as it has been recognized that the students need a facility designed more specifically for their learning needs. The MPG building will also house some shared services with Benson High School, such as the Teen Parent Center. The available 2017 Bond funding for the Benson Modernization project (including the MPG building) is being utilized for the design phase. Funds from the 2020 Bond Program will be used for construction of the MPG building. The funding includes $2M to increase the structural system to Risk Category IV.

Funds for **Jefferson** will be used for the complete modernization of Jefferson High School, encompassing master plan, design, construction and occupancy/close-out phases. The Jefferson High School Conceptual Master Plan, completed by the 2017 Bond Program, will be used as the starting point for the Jefferson High School Modernization Master Plan.

Funds for the **Center for Black Student Excellence** will be used for master planning, design and initial implementation, including focused investments in the neighborhood schools surrounding Jefferson High School, toward a community vision of a Center for Black Student Excellence. This new collective impact effort channels the decades of visionary leadership and culturally responsive and pedagogically sustaining approaches of community-based nonprofits like Self Enhancement, Inc., and KairosPDX, among other Black-led, culturally specific organizations here in Portland. This emerging community-led concept seeks to unify and elevate the educational experience of Portland's Black children and their families, connecting a constellation of community schools, such as Boise Eliot/ Humboldt Elementary, Dr. Martin Luther King Jr. Elementary, Harriet Tubman Middle School, and Jefferson High School, and Black-led community-based organizations in the Albina Neighborhood.

Funds identified for **Cleveland - Planning & Design** will be used for initial phases of a complete modernization of Cleveland High School. These funds will provide budget for master planning, design, and pre-construction planning, with the intent to request funding for construction in a future bond measure. Efforts to secure funding for construction, and the potential timing of such funding, will be kept in consideration during planning and design, such to ensure the most efficient and effective transition to future construction. It is the intent of the 2020 Bond Program to hold for construction any funds that are not needed to complete master planning and design. The Cleveland High School Conceptual Master Plan, completed by the 2017 Bond Program, will be used as the starting point for the Cleveland High School Modernization Master Plan.

Funds identified for **Wilson - Planning & Design** will be used for initial phases of a complete modernization of Wilson High School. These funds will provide budget for master planning, design, and pre-construction planning, with the intent to request funding for construction in a future bond measure. Efforts to secure funding for construction, and the potential timing of such funding, will be kept in

DRAFT

consideration during planning and design, such to ensure the most efficient and effective transition to future construction. It is the intent of the 2020 Bond Program to hold for construction any funds that are not needed to complete master planning and design. The Wilson High School Conceptual Master Plan, completed by the 2017 Bond Program, will be used as the starting point for the Wilson High School Modernization Master Plan.

Funding in the amount of $2M from the **Capacity** category has been budgeted to support design planning for the Roosevelt High School final phase to meet 1700 student capacity. The remaining funding will be used for additional Capacity-related projects.

The **Technology** category of this bond program includes devices for students and staff as part of the modernization project, as well as non-device components. One of the larger projects is a classroom modernization project that will provide foundational technology equipment which would normally happen in conjunction with a full scale school modernization effort. This project will bring wireless networking (WiFi), mounted projectors with wireless display capabilities, voice amplifications, and dedicated computing capabilities to every classroom in the district. Core infrastructure that has been neglected for many years will be replaced and upgraded. This includes the district's phone system, the network switching infrastructure, older WiFi access points, network interconnects, and data center hardware which many of the district's critical functions rely upon for their functionality.

The **Curriculum** funds of the 2020 Bond Program will be used to adopt comprehensive, culturally relevant and current curriculum and instructional resources and materials, across core subject areas, including language arts, math, science, the arts and social emotional learning. This investment will provide students with high-quality, standards-based instructional materials, will allow for a return to the Oregon textbook adoption cycle, and will support more innovative PPS vision-oriented courses of study (e.g. climate justice, ethnic studies, middle school redesign, experiential education and portfolios, computer science).

SPED Learning Environment funds will provide the resources to equip or update the current SPED learning environments in the District with furniture and fixed equipment aligned with PPS standards and identified by SPED leadership as high priority investments. The District currently supports 82 focus option SPED classrooms; many of these classrooms are overcrowded so some allowance for expansion is accounted for here. Beyond furniture and equipment aligned with PPS standards, this option includes an allowance for classroom modifications. These modifications include acoustic baffling, replacement of fluorescent lights with dimmable LEDs, and built-in casework, to name three important examples. Other SPED Learning Environment improvements may include adaptive playground equipment or other site-based improvements. Combined, the addition of District standard furniture and equipment with classroom modifications and targeted site improvements will support both the instructional requirements of special education staff and the sensory-needs of our students.

Roof funds will address roofing needs that are currently critical or will become critical over the term of the bond. The budget assumes approximately 12 roofs, with roughly 4 roofs capable of being completed

per summer. Roof replacements often include ancillary scope of work including roof level seismic improvements, additional building insulation, replacing outdated rooftop equipment, etc.

Mechanical deficiencies are PPS' largest facility need with dozens of schools having major mechanical system components in currently critical condition. Mechanical systems have many complex, dependent components making it challenging to predict a system's performance, identify the root cause of failure, design needed fixes and estimate the total cost. Detailed assessment by professional mechanical engineering firms will be necessary to determine how to resolve a failing or poor performing system. However, these funds provide the budget to complete 5 large mechanical projects each year at an average cost of $5 million per project. They assume some projects will require full system replacement, while others will require only targeted improvements. This amount is anticipated to address approximately 15 of PPS' highest priority sites. Additional smaller projects will also be completed over the course of the bond.

Funds identified for **Security** will add locking hardware to all classroom doors throughout the district, updated intrusion alarm systems, and additional security cameras. Currently the majority of classrooms throughout the District require use of a key or a sub-standard lock to secure a classroom door. A portion of the funds will be used to upgrade all classroom door locks to the current district standard that allows for a door to be secured by hand from the inside of a classroom. Funds will also be used to upgrade or replace intrusion alarm systems to allow for remote control and integration with other building security systems. The remainder of the funds will provide for installation of additional security cameras through District schools.

Seismic funds will be used to retrofit up to 3 smaller schools that are on the City of Portland URM database and are likely to be included in a full roof replacement as part of this bond effort. Performing seismic retrofit projects in coordination with full roof replacement projects ensures roof-level seismic improvements take place at the same time, to create a building-wide seismic upgrade.

Funds called out for **ADA** accessibility will allow the District to remove barriers at the main level of all school buildings district-wide. Main-level accessibility will include portions of the site necessary to reach the main entrance from the bus or drop-off area, the main entrance, and access to essential programming. Here, 'essential programming' includes an individual's classroom(s), the cafeteria, library, gym, and one or more accessible restroom(s).

Administration funds are used to address administrative costs of running the program, including: staffing; office supplies and furniture; computer equipment; professional services for program-wide use, such as audits; bond issuance costs; insurance; and other miscellaneous costs.

Program **Contingency** is a risk management tool used to buffer against unanticipated costs. Program contingency is available to cover costs including: estimating errors; discretionary scope additions; higher than anticipated escalation costs; building code or zoning code changes; emergency facility needs; pandemic related cost impacts; additional staff and resources for community engagement; or

any other unanticipated cost whether it be discretionary or nondiscretionary. All program contingency funds are ultimately allocated to and spent on capital projects.

Board and Community Input and Oversight

As is currently done with 2012 and 2017 Bond Programs, OSM expects to report progress of the 2020 Bond Program work to the **Board of Education** at regular intervals and update status transparently through PPS's public website. Other Program related activities such as master plan approvals, project briefings, Board work sessions, use of program contingency, ground breakings, ribbon cuttings and other significant events may be addressed in separate Board sessions or as invitations to events.

The **Bond Accountability Committee (BAC)** already established for the 2012 and 2017 Bond Programs will include the scope of the 2020 Bond Program to ensure the objectives of the voter-approved initiative are met. The BAC reports directly to the Board and meets at least quarterly. BAC meetings are publicly noticed and open to public comment.

As is now standard for OSM modernization projects, **Master Plan Advisory Committees (MPACs)** will also be established for the master plan phase of each of the three Modernization projects: Jefferson High School Modernization; Cleveland High School Planning & Design; Wilson High School Planning & Design. Members may include teachers, students, parents/guardians, neighbors, community business leaders and other interested parties. When the projects move into the design phase, project **Design Advisory Groups (DAGs)** will be established. Each project will have MPACs and DAGs unique to that community. Members of the Master Plan Advisory Committees will be invited to continue participation via the DAGs, but new members may also join at that time. Extensive community engagement will be accomplished through a variety of design charrettes, open houses and other forums as a standard practice with each of these projects.

Prior, and in addition, to the standard community engagement processes noted above, PPS will be engaging in an intensive dialogue with the community about strategies to support Black student achievement. The Jefferson High School Modernization and Center for Black Student Excellence projects together are intended to provide a set of cohesive and comprehensive PK-12 school environments that support a culturally-responsive community vision. The PPS Department of Community Engagement will be collaborating with a coalition of community partners to engage students, families, and community stakeholders in developing a coherent set of strategies that will positively impact student achievement and outcomes while affirming Black student identity. These efforts will start in January 2021 and last several months prior to beginning master plan phases in Fall 2021 for the Jefferson High School Modernization and Center for Black Student Excellence projects. Community engagement in the master plan phases will build on these efforts as design teams work to develop the physical environments that will best support the identified strategies and vision.

For the Curriculum portion of the 2020 Bond Program, **Curriculum & Instructional Resource Adoption Committees** will be established for each content area adopting new resources. The committees will be comprised of a diverse group of stakeholders and may include educators from across the district, central

DRAFT

office leaders, and local or national experts. Furthermore, extensive community engagement with students, parents, caregiver and family members will be accomplished through open houses, focus groups, and additional culturally-responsive feedback loops.

Performance Audits are conducted on a yearly basis with an update report that is presented to the BAC and Board of Education at the end of the fiscal year. Performance audits review specific focus areas of the bond program operations. These focus areas are determined each year through discussions between the performance auditors, PPS leadership, and the BAC. They frequently arise out of current issues, potential areas of concern noted in previous audits, or common bond operations challenges. The audit is conducted in accordance with Generally Accepted Government Auditing Standards (GAGAS), commonly referred to as the "Yellow Book." Audits include findings from the auditors and response from the District. Findings are tracked, implemented via a process improvement process when implementation is needed, and progress reported to the BAC on a quarterly basis.

Bond-funded construction projects also undergo payment process audits for both the architect and construction contracts, called **Construction Audits**. Construction audits are conducted at the end of the schematic design phase for the architectural design contract and approximately 6 months after the commencement of construction operations for the construction contract. The audit is intended to assess the payment application process and validate that the project team is conducting the reviews and subsequent payment approval in accordance with the requirements of the contract terms. This audit is utilized to help correct any issues with the review process to enable better and more efficient processing of future payment applications.

<u>Project Management Office</u>

The Office of School Modernization (OSM) will be responsible for 2020 Bond Program funding as a whole. OSM will manage projects for facility-related improvements, including Modernizations, Physical Facility Improvements, and Educational Improvement/SPED Learning Environments. Within OSM, projects are typically managed by project teams (see below for additional information). These project teams report to a Director of Construction, who reports to the OSM Senior Director. Project teams are supported by OSM operations staff who manage bond-specific finance, contracts, invoices, communications, and other technical and administrative logistics. Operations staff report to a Senior Manager of Business and Operations, who reports to the OSM Senior Director. Approval workflows for project expenditures and encumbrances route through the Director of Construction, OSM Senior Director, Chief Operating Officer, and Director of Purchasing & Contracting, in sequence depending on financial limits of authority. Approval workflows for budget transfers and fund moves within eBuilder, the OSM system of approval (see below for more information), route through the OSM Senior Manager of Business Operations and the OSM Senior Director.

The Office of Technology and Information Services (OTIS) will manage projects for the Educational Improvement/Technology category of work. The Office of Teaching & Learning (OTL) will manage projects for the Educational Improvement/Curriculum category of work. Expenditures and

DRAFT

encumbrances for non-OSM projects will follow the approval and levels of authority process standard within their PPS departments. They will then route to OSM for the approval workflows noted above.

All OSM-managed projects will have a **Project Team** with a designated lead Project Manager to be accountable and responsible for achieving established project outcomes including safety, scope, quality, budget and schedule over the entire duration of the project. Larger projects, such as the Modernization projects, will typically have a senior Project Manager that acts as team lead, supported by other Project Managers and Construction Managers. Construction Managers provide technical expertise on constructability and costs during design phases, and provide site observation and contract oversight during construction. Project Managers will typically be PPS employees, while Construction Managers will typically be contracted from outside project management firms. OSM has, and anticipates maintaining, on-call contracts with multiple project management firms to ensure quality and selection.

All Educational Improvement/Curriculum projects will be coordinated by a lead Project Manager and the Chief Academic Officer as Executive Sponsor. In addition, each content area adopting instructional resources will have a Project Team with a designated lead who will be accountable and responsible for achieving established project outcomes including scope, budget and schedule over the entire duration of the project. Content-specific leads will provide technical expertise on sound pedagogy, high-quality instructional resources, and culturally-responsive instructional practices.

Educational Improvement/Technology projects will be overseen by the Senior Director of Technology, in coordination with the Chief Technology Officer. OTIS expects to utilize external professional services contractors for project management. An OSM project manager/construction manager will manage facility-related improvements needed for Technology projects and act as liaison between OSM and OTIS.

OSM maintains a **Program Management Plan (PMP)**, that provides key information about how the Bond programs are organized and administered. In addition to the PMP, standard procedures are collected into **Standard Operating Procedures (SOPs)**, used for training and reference for staff. The PMP and SOPs are regularly updated and ensure staff are following best practices. Project teams for Modernizations are required to develop a **Project Team Management Plan (PTMP)** to document basic project scope, budget, schedule and assumptions, as well as define team roles and responsibilities and identify any noteworthy project considerations.

Project Framework and Sequencing

Project planning and design for all construction projects will be informed by PPS's **Educational Specifications** and **Construction Design Guidelines**. The Jefferson High School, Cleveland High School, and Wilson High School modernization projects will also be informed by the **Conceptual Master Plans** completed in the 2017 Bond Program. **Comprehensive Master Plans**, that are developed at the start of planning and design, will provide the underpinning of project design for the Jefferson High School, Cleveland High School, and Wilson High School modernization projects, as well as the Center for Black Student Excellence project.

DRAFT

The Jefferson High School Modernization project will be the first modernization project of the 2020 Bond Program to move forward and the first to complete, with anticipated initial opening at the start of the 26-27 school year. While the 2020 Bond Program does not include funding to complete construction for the Cleveland High School and Wilson High School modernization projects, the projects will move forward with master planning and design on a timeline to allow for opening at the start of the 27-28 school year if construction funding is approved in a future bond.

Physical facility improvements, such as roof replacements, mechanical system replacements or major repairs, and seismic upgrades, are typically significant in their impacts on site occupants. These projects will be scheduled for summer construction to avoid impacting school staff and students. It is important to note that the schedule of projects also relies on both internal staff capacity and external market capacity. In other words, a limited number of these types of projects can occur in one summer, so the current forecasted schedule assumes it will take five years of construction to spend the 2020 Bond Program funds for these projects.

Some projects can occur year-round, because their impacts on occupancy are limited. This may include projects from the Security, SPED Learning Environments, ADA and Technology categories, or smaller-scale projects from other categories. Project managers will work closely with site administrators in coordinating projects and communicating to affected parties.

Instructional resource adoption will occur on the typical annual cycle, and adoption is intended to occur across 12 curricular areas over the next three years.

Purchasing of new technology devices for teachers, students and staff is already underway as part of the Device Refresh component of the Technology funds. OTIS is developing the schedule for the remaining components of the schedule. As several different types of planned upgrades may affect a given site, one important consideration being addressed in planning is to minimize the amount of disruption to a school site by coordinating multiple scopes of work to occur at the same time.

<u>Project Selection & Prioritization</u>

For the 2020 Bond Program categories that are based on a scope of work and not specific projects, it will be necessary to select and prioritize projects. The following describes how the selection and prioritization process will be determined.

The 2017 Bond Program specified funding for **Roof** repair and replacement projects. These projects have been steadily occurring since the start of that program, utilizing a selection and prioritization process previously approved by the Board. While selection and prioritization was initially based on 2009/2012 roof assessments, in coordination with work order data and maintenance input, a Facilities Condition Assessment (FCA) was completed in 2019 that has provided additional condition data. Staff anticipate continuing the selection and prioritization process currently occurring with the 2017 Bond Program projects, that utilizes FCA data, work order data, previous roof assessments and other input from maintenance field staff. Additional roof-specific assessments may be commissioned from

DRAFT

consultants. This process will also be coordinated with the Capital Improvement Plan currently under development. Roof replacement projects are already in design for the 2021 summer construction schedule, using 2017 Bond Program funds. Staff anticipates starting design for 2022 summer construction projects in Fall 2021, and will spend the prior months selecting, prioritizing, and planning those projects.

As noted above, **Seismic** projects are likely to occur in conjunction with Roof replacement projects, to ensure that roof-level seismic upgrades can occur in coordination with seismic improvements below the roof level. District-wide review of seismic needs will occur as part of the long-term capital planning process that is selecting and prioritizing Roof replacement projects.

The 2019 Facilities Condition Assessment reinforced the extent of **Mechanical** failures District-wide that was already obvious in work order data. The assessment data, however, does not identify: when system-wide replacements are needed versus component replacement; what systems should be replaced with; or the extent to which other building elements, such as walls or roofs, may be impacted in a replacement. Staff anticipate working within the capital improvement planning process to: identify a set of sites that have the greatest need due to mechanical failures; develop long-term goals with an understanding of maintenance, comfort, and sustainability concerns; and hire a consultant to do focused assessments and recommendations of these sites to determine what can be completed with the funds available. Staff will update the Board on the progress and outcome of this work over the next 6 months. While construction of larger projects will likely not occur until summer 2022, smaller and emergency needs are expected to be addressed on an as-needed basis beginning in spring/summer 2021.

Similar to other scopes of work, for the **Security** improvements staff will review Design Guidelines to ensure they are up-to-date with current standards. Classroom locks, intrusion alarm systems and security cameras have all been installed during recent Modernization projects per Design Guidelines, which will lessen the review time. Assessments of existing conditions will be needed to identify specific needs by site. Prioritization criteria were developed for the 2017 Bond Program security improvements. These criteria will provide a starting point, to be reviewed for new understandings and taking into account stakeholder feedback on the 2017 Bond prioritization criteria. Staff anticipates reviewing the proposed prioritization process with the Board in Summer 2021.

The **ADA** Transition Plan will be presented to the Board for approval in early 2021. The ADA Transition Plan identifies improvements needed by school and prioritization criteria. Scope refinement will be needed for each site, in conjunction with cost estimating. Staff anticipates beginning detailed scope definition by site shortly after Board approval of the ADA Transition Plan. Implementation of improvements is anticipated to occur in tandem with SPED Learning Environments improvements (see below).

While some work has been completed in updating relevant Education Specifications and Design Guidelines for **SPED Learning Environments**, some additional work will be needed. Studies will be

DRAFT

necessary to identify acoustic standards, and may be needed for other standards as well. A significant amount of internal stakeholder engagement has already been completed, but additional community engagement will be important. Assessments of existing SPED Learning Environments needs will be completed to determine which improvements are needed for each focus area. As special education and ADA communities frequently have overlap in physical support needs, staff anticipates prioritizing SPED Learning Environments improvements in tandem with ADA improvements.

School-based **Technology** upgrades, such as Device Refresh, Classroom Modernization, and Infrastructure and Security, are intended to bring all school sites up to the same level of improvement. OTIS staff are currently performing site-by-site evaluations to determine site-specific scope. This will help inform prioritization. Additional prioritization criteria, such as current asset failure, security vulnerabilities, and Racial Equity and Social Justice, will be developed and reviewed over the next 2-3 months.

Prioritization of instructional resource adoption for specific **Curriculum** areas is based on re-aligning with the Oregon Department of Education's 7-year adoption schedule, in context of the District's curriculum adoption progress. Some curricular areas may only need partial resource adoption while others will need full resource adoption.

<u>Internal Stakeholder Engagement</u>

OSM project teams will engage a variety of internal District staff in **Focus Group** meetings during planning, design and construction phases of work for Modernization, Physical Facility Improvement, Educational Improvement/SPED Classroom, and Capacity projects. These groups include but are not limited to: Building level staff, academic departments, Office of Teaching and Learning (OTL), Office of School Performance (OSP), Facilities and Asset Management (FAM), Nutrition Services, Transportation, Security, and Information Technology. During the planning and design phases of work, the internal groups along with any external committees, such as the MPACs or DAGs, will meet to review project details at pre-established milestones such as master plan, schematic design, design development and construction documents. Project updates and site visits will be coordinated during construction and the project closeout phase. OSM will also implement project **Steering Committees** for Modernization projects. These internal stakeholder committees, made up of OTL, OSP, and FAM leaders with decision-making authority, meet monthly to coordinate across departments in addressing specific issues.

Curriculum project teams will engage in a variety of internal engagement opportunities. Content leaders will work with educators across the district during project planning, reviewing and recommending of resources, field testing, and final selection of instructional materials. These groups include but are not limited to: building-level professional educators, building administrators, academic departments (such as Special Education, Talented & Gifted, English as a Second Language, Dual Language, and Social-Emotional Learning), Technology, Procurement & Contracting and the Office of School Performance. During the planning and implementation phases of work, the internal groups, along with any external committees, will meet to review project details and provide feedback on recommended resources.

DRAFT

Monthly updates will be provided to senior leaders in the Division of Instruction and School Communities to coordinate across offices and address any specific issues.

Procurement Strategy

PPS will use Board approved public contracting rules for all contracted services. PPS' adopted **Public Contracting Rules** will guide contracting efforts. Division 47 – Goods and Services rules will be used to acquire items not considered "intrinsic" to the building (and therefore not a part of the construction contract). Division 48 – Consultant selection: Architectural, Engineering, Land Surveying and Related Services rules will be used to obtain professional services needed to support public improvement construction contracts. Division 49 – Public Improvements rules will be used to acquire contractor services to construct public improvements. Staff may also use Personal Services contracts or Cooperative Agreements, as defined in Division 46, where needed.

Bond funded contracts will fully comply with the District's **equity in public contracting i**ncluding aspirational goals for minority, women and emerging small business; percentage requirements for apprenticeable trade participation; and requirements for provision of student career learning opportunities. In addition, District staff will engage in proactive outreach activities to maximize certified business participation and ensure full and open competition. OSM is currently focusing on developing additional strategies to more effectively support racial equity and social justice. This focus includes working closely with the Bond program's performance auditors to review how OSM currently supports business equity; reaching out to the Bond Accountability Committee for input on both specific and general concerns; and meeting with PPS Senior Leadership and other internal departments on a monthly basis to develop and review strategies.

The use of **alternative procurement** methods will be reviewed individually for each project. Typically, alternative procurements provide value for projects that have complex scope, significant potential unforeseen conditions or compressed schedules. The partnership model of alternative procurements such as Construction Manager/General Contractor agreements can also be beneficial for projects that will need cost and constructability feedback during design to substantially determine scope. OSM will consider lessons learned and alternative procurement analyses completed for previous, alternatively-procured PPS projects as part of any 2020 Bond Program alternative procurement decision. All alternative procurements will follow PPS adopted Public Contracting Rules, including any required Board approvals.

Budget and Financial Operations

The **Program budget** will account for the entire $1.2B bond and any additional revenue received. Bond sale premiums, interest earned and other additional revenue sources will not be budgeted or forecasted until received. Additional revenue sources may become available over the course of the program, and budget allocations within the program may change based on the inclusion of grants, other revenue sources, Board decisions, or allocation of Program Contingency to individual projects.

DRAFT

Similar to the 2012 and the 2017 Bond Programs, the District's Enterprise Resource Planning system (currently PeopleSoft) will be the **financial system of record**. OSM's web-based Project Management Information System (currently eBuilder) will act as the **system of approval** for all Bond-funded expenditures and encumbrances, regardless of which District department is taking lead on project management. For purposes of record-keeping, auditability and accountability, all proposed, Bond-funded expenditures and encumbrances will be entered into eBuilder to follow a predetermined approval workflow that meets District requirements for financial and contractual limits of authority. Once approvals have been received through eBuilder, OSM Operations staff will transition and coordinate any needed additional steps with PeopleSoft or other District systems or departments, per the processes that are currently in place for 2012 and 2017 Bond Programs. Progress financial reports to the Bond Accountability Committee and the Board will be based on data in eBuilder. District financial audits will be based on data in PeopleSoft. The two systems are reconciled on a monthly basis.

PPS anticipates issuing bonds via a series of **bond sales**. The first sale is anticipated to be in late 2020. Future sales will depend on cash flow needs as the program progresses. OSM will work closely with Finance to coordinate issues and receipt of funds; cash flow needs that might impact investment strategies; and any constraints on fund use. Use of bond funds for PPS staff and public contracts must be deemed "capitalizable" as defined by GASB accounting rules and will be audited for compliance. Questions of bond compensability will be reviewed by a group of internal finance and leadership staff, utilizing external financial and legal resources, and the group will make recommendations for decision by the Chief Financial Officer.

DRAFT

Portland Public Schools Capital Construction Bond

Citizen Accountability Committee

Charter

Background:

Portland Public Schools (PPS) has referred a Capital Construction Bond Measure for voter approval on the November 6, 2012, ballot. The Superintendent and School Board desire to establish a citizen accountability committee to assist in monitoring the planning and progress of the bond program.

Committee Charge:

In response to the need for accountability regarding the District's effective use of capital construction bond funds, the PPS School Board will appoint a Citizen Accountability Committee ("Committee") whose charge will be to monitor the planning and progress of the bond program relative to voter-approved work scope, schedule and budget objectives. The Superintendent has overall responsibility for performance of staff engaged in the implementation of the bond program.

The Committee will actively review the bond program, and provide advice to the Board on:

- Whether the school district bond revenues are expended only for the purposes for which the bond was approved, and that bond revenues are not used for any purpose prohibited by law;
- Alignment with the goals and principles of the Long Range Plan;
- Alignment with the goals of the Business Equity Policy;
- District standards and innovative practices for achieving lower maintenance and construction costs while improving operating efficiency and increasing building longevity;
- Historic preservation and school renovation opportunities compatible with the architecture of surrounding Portland neighborhoods;
- Potential capital partnerships for joint and shared use of PPS facilities;
- Implementation of appropriate ways to address seismic issues;
- Compliance with ADA; and
- Communicating key information related to the bond to the School Board, public groups, organizations and stakeholders.

The Committee will receive and review copies of Bond Program performance and financial audits, and has the option to inspect school facilities and grounds related to bond activities to ensure Bond revenues are expended in compliance with state law and the ballot measure language.

The Committee will review quarterly reports produced by the District each year the bond proceeds are being spent in order to verify general compliance with the purposes set forth in the capital improvement program as approved by the voters

The Committee will perform other reasonable duties requested by the School Board or Superintendent.

Committee Membership:

The Committee shall consist of seven members. The Superintendent will make recommendations to the School Board for six committee members and a chairperson to the Board for appointment.

The Committee shall be comprised of a mix of individuals with a good reputation in the community for fairness and transparency and a majority of the committee will be people with a combination of experience in building design; construction; construction financing; public contracting, budgeting, and/or auditing.

a) The Committee members shall receive no direct or indirect compensation from the District for their services as members of the Committee.

b) The Committee members may not have an active or pending contract with the District, nor enter into a contract during their term on the Committee.

c) The Committee may not include any employee or official of the District, or any vendor, contractor or consultant of the District.

d) A Committee member serves to advise the Superintendent and School Board. If a Committee member resigns, violates the Ethics Policy contained herein (see attachment), fails to attend two consecutive Committee meetings without reasonable excuse, or otherwise becomes unable to serve on the Committee, the Superintendent may declare the position on the Committee to be vacant and appoint another qualified person to the Committee with the approval by the Board.

e) Members are appointed to staggered 2, 3 and 4-year terms and may reapply for consideration to serve additional terms. A member may not serve more than eight consecutive years.

Committee Operations:

The charge to the Committee does not include:

a. Approval of construction contracts;

b. Approval of construction change orders;

c. Appropriation of construction funds;

d. Handling of legal matters;

e. Approval of construction plans and schedules;

f. Approval of the sale of bonds;

g. Priorities and order of construction for the bond projects;

h. Selection of architects, engineers, construction managers, project managers, and such other professional service firms;

i. The approval of the design for any project;

j. The selection of independent audit firm(s), performance audit consultants and such other consultants as are necessary to support the performance of the Bond Program;

k. Setting or approving schedules of design and construction activities; or

l. Activities, roles or responsibilities that have been designated by the Superintendent or her designee to staff or consultants, or any policy-making responsibilities.

Committee Meetings:

a) The Committee will meet quarterly or as requested by the School Board, Superintendent, District staff or the Committee chair.

b) Committee meetings are advisory and not related to formal decision-making by the PPS School Board. Committee meetings shall be publicly noticed and include opportunity for public comments.

c) The Chief Operating Officer, Chief Financial Officer, and Director of the Office of School Modernization will provide support and staffing to the Committee.

d) PPS staff will provide necessary technical and administrative assistance as follows:

(1) A meeting room, including any necessary audio/visual equipment;

(2) Preparation and copies of any documentary meeting materials, such as agendas and reports; and distribution of those materials to the committee in a timely manner.

(3) Provision of quarterly reports covering the School Bond Program.

(4) Preparation of Committee meeting minutes and posting for public viewing and use on the PPS web site.

(5) PPS staff will attend Committee meetings in order to report on the status of capital improvement projects, to respond to questions, and to receive advice and counsel on the overall bond program or any of its component parts. PPS project consultants may attend Committee meetings at the discretion of PPS staff.

Attachment

Portland Public Schools Capital Construction Bond Citizen Accountability Committee: Ethics Considerations

An ethics policy provides general guidelines for Committee members to follow in carrying out their roles. Not all ethical issues that Committee members face are covered in this Policy. However, this Policy captures some of the critical areas that help define ethical and professional conduct for Committee members. Committee members are expected to strictly adhere to the provisions of this Ethics Policy.

Policy:

CONFLICT OF INTEREST. A Committee member shall not make or influence a District decision related to:

1. any contract funded by bond proceeds; or
2. any construction project which will benefit the Committee member's outside employment, business, or provide a financial benefit to a family member, such as a spouse, child, parent or sibling.

OUTSIDE EMPLOYMENT. A Committee member shall not use his or her authority over a particular matter to negotiate future employment with any person or organization that relates to:

1. any contract funded by bond proceeds; or
2. any construction project. A Committee member shall not make or influence a District decision related to any construction project involving the interest of a person with whom the member has an agreement concerning current or future employment, or remuneration of any kind.

For a period of one (1) year after leaving the Committee, a former Committee member may not represent any person or organization for compensation in connection with any matter pending before the District that, as a Committee member, he or she participated in personally and substantially. Specifically, for a period of one (1) year after leaving the Committee, a former Committee member and the companies and businesses for which the member works shall be prohibited from contracting with the District with respect to:

1. bidding or proposing to provide services on projects funded by the bond proceeds; and/or
2. any construction project funded by the District.

COMMITMENT TO UPHOLD LAW. A Committee member shall uphold the federal and Oregon Constitutions, the laws and regulations of the United States and the State of Oregon, and the policies, procedures, rules and regulations of the Portland Public School District.

COMMITMENT TO THE PUBLIC. A Committee member shall place the interests of the public above any personal or business interest of the member.

Date: December 7, 2020

To: School Improvement Bond Committee

From: Dan Jung, Chief Operating Officer

Subject: Bond Accountability Committee Membership

The Bond Accountability Committee (BAC) Charter identifies a membership of 7-10. The current BAC has 9 members, with 3 leaving the committee by the end of 2020; affording 4 potential openings. The remaining 6 BAC members collectively have strong professional experience and expertise in construction management, design and engineering experience, auditing, project and program management, public and private capital planning and finances, among many other skills and backgrounds. With the departure of several BAC members, coupled with passage of the 2020 bond, staff sees an opportunity to maintain the strong capital management expertise while also increasing the breadth of experience on the BAC and the committee's demographic diversity.

In addition to the core competencies noted in the BAC Charter, staff recommends prioritizing potential candidates with experience in one or more the 2020 bond scopes of work that are new to the capital program (EG: curriculum or technology), and applicants with professional experience in supporting business equity in capital projects. Additionally staff recommends prioritizing applicants that will increase the diversity of the committee.

Applicants

Staff and board members co-created a new BAC application form. The form was posted to the BAC website (https://www.pps.net/Page/464https://www.pps.net/Page/464) on October 20, 2020. Staff and board members reached out to potential applicants and directed interested parties to the application form. To date 14 individuals have submitted applications for consideration. Staff recommendations are as follows:

A. Staff recommends offering a BAC position to Applicant #10. This applicant identifies as a black / african-american woman with a strong background in workforce equity, finance, trade apprenticeship programs, finance, and construction among other skills. Below is the applicant's description of relevant experience:

I am the executive director of a trade association of small, minority, women owned firms in Construction. The mission of the organization is to advance equity in the industry through advocacy, education and training of minority and women owned subcontractors. I am also on the executive board membership of Metropolitan Alliance of Workforce Equity (MAWE), an organization with membership of unions, pre-apprenticeship and community based organizations. Additionally, I spent the last 12 years of my career in commercial lending with local Oregon Banks. I have a degree in Accounting and specialize in credit analysis and fund accounting.

B. Staff recommends offering a BAC position to Applicant #11. This applicant identifies as a black / african-american man with background in workforce equity, and support for community organizations. Below is the applicant's description of relevant experience:

> Assisted in development of workforce equity programs in previous positions; Urban League; U.S. Air Force. Member of Finance Committee on board - Youth Progress. Member of Facilities Committee on board - Oregon Historical Society

C. Staff recommends offering a BAC position to Applicant #12. This applicant identifies as a white woman with a strong background in technology infrastructure. Below is the applicant's description of relevant experience:

> In my role at the Technology Association of Oregon, I manage our workplace and talent strategies to create an inclusive tech literate workforce throughout the state. Additionally, in my role, I spend a lot of time exploring tech infrastructure, the digital divide and how to ensure the equitable distribution of technology which would be great to see PPS incorporate as part of a capital investment strategy.

D. Staff recommends offering a BAC position to Applicant #14. This applicant identifies as a white woman with extensive experience in supporting disabled populations, with specific knowledge regarding accessibility. Below is the applicant's description of relevant experience:

> I founded a grass roots non profit and also employ people with disabilities. This means I have small business experience in all fiscal and management areas over the last 20 years

Attachments:

A. Bond Accountability Committee Charter
B. Bond Accountability Committee New Applicant Table