

AGREEMENT FOR PROFESSIONAL SERVICES

ARTICLE 1 PARTIES AND PURPOSE

Section 1.1 Parties

THIS AGREEMENT is entered into on _____, 2024, by and between the CITY OF LODI, a municipal corporation (hereinafter "CITY"), and BICKFORD VENTURES, INC., a California corporation doing business as DIVISION 1 CONSTRUCTION MANAGEMENT SERVICES (hereinafter "CONTRACTOR").

Section 1.2 Purpose

CITY selected the CONTRACTOR to provide the services required in accordance with attached Scope of Services, Exhibit A, attached and incorporated by this reference.

CITY wishes to enter into an agreement with CONTRACTOR for Construction Management, Construction Testing, and Special Investigation Services for the Lodi Access Center and Emergency Shelter (hereinafter "Project") as set forth in the Scope of Services attached here as Exhibit A. CONTRACTOR acknowledges that it is qualified to provide such services to CITY.

ARTICLE 2 SCOPE OF SERVICES

Section 2.1 Scope of Services

CONTRACTOR, for the benefit and at the direction of CITY, shall perform the Scope of Services as set forth in Exhibit A.

Section 2.2 Time for Commencement and Completion of Work

CONTRACTOR shall commence work pursuant to this Agreement, upon receipt of a written notice to proceed from CITY or on the date set forth in Section 2.6, whichever occurs first, and shall perform all services diligently and complete work under this Agreement based on a mutually agreed upon timeline or as otherwise designated in the Scope of Services.

CONTRACTOR shall submit to CITY such reports, diagrams, drawings and other work products as may be designated in the Scope of Services.

CONTRACTOR shall not be responsible for delays caused by the failure of CITY staff to provide required data or review documents within the appropriate time frames. The review time by CITY and any other agencies involved in the project shall not be

counted against CONTRACTOR's contract performance period. Also, any delays due to weather, vandalism, acts of God, etc., shall not be counted. CONTRACTOR shall remain in contact with reviewing agencies and make all efforts to review and return all comments.

Section 2.3 Meetings

CONTRACTOR shall attend meetings as may be set forth in the Scope of Services.

Section 2.4 Staffing

CONTRACTOR acknowledges that CITY has relied on CONTRACTOR's capabilities and on the qualifications of CONTRACTOR's principals and staff as identified in its proposal to CITY. The Scope of Services shall be performed by CONTRACTOR, unless agreed to otherwise by CITY in writing. CITY shall be notified by CONTRACTOR of any change of Project Manager and CITY is granted the right of approval of all original, additional and replacement personnel at CITY's sole discretion and shall be notified by CONTRACTOR of any changes of CONTRACTOR's project staff prior to any change.

CONTRACTOR represents it is prepared to and can perform all services within the Scope of Services (Exhibit A) and is prepared to and can perform all services specified therein. CONTRACTOR represents that it has, or will have at the time this Agreement is executed, all licenses, permits, qualifications, insurance and approvals of whatsoever nature are legally required for CONTRACTOR to practice its profession, and that CONTRACTOR shall, at its own cost and expense, keep in effect during the life of this Agreement all such licenses, permits, qualifications, insurance and approvals, and shall indemnify, defend and hold harmless CITY against any costs associated with such licenses, permits, qualifications, insurance and approvals which may be imposed against CITY under this Agreement.

Section 2.5 Subcontracts

Unless prior written approval of CITY is obtained, CONTRACTOR shall not enter into any subcontract with any other party for purposes of providing any work or services covered by this Agreement.

Section 2.6 Term

The term of this Agreement commences on September 1, 2024 and terminates upon the completion of the Scope of Services or on August 31, 2025, whichever occurs first.

Section 2.7 Option to Extend Term of Agreement

At its option, City may extend the terms of this Agreement for an additional one year extension(s); provided, City gives Contractor no less than thirty (30) days written notice of its intent prior to expiration of the existing term. In the event City exercises any option under this paragraph, all other terms and conditions of this Agreement continue and remain in full force and effect.

The total duration of this Agreement, including the exercise of any option under this paragraph, shall not exceed two year(s).

**ARTICLE 3
COMPENSATION**

Section 3.1 Compensation

CONTRACTOR's compensation for all work under this Agreement shall conform to the provisions of the Fee Proposal, attached hereto as Exhibit B and incorporated by this reference.

CONTRACTOR shall not undertake any work beyond the scope of this Agreement unless such additional work is approved in advance and in writing by CITY. **Section 3.2 Method of Payment**

CONTRACTOR shall submit invoices for completed work on a monthly basis, or as otherwise agreed, providing, without limitation, details as to amount of hours, individual performing said work, hourly rate, and indicating to what aspect of the Scope of Services said work is attributable. CONTRACTOR's compensation for all work under this Agreement shall not exceed the amount of the Fee Proposal.

Section 3.3 Costs

The Fee Proposal shall include all reimbursable costs required for the performance of the Scope of Services. Payment of additional reimbursable costs considered to be over and above those inherent in the original Scope of Services shall be approved in advanced and in writing, by CITY.

Section 3.4 Auditing

CITY reserves the right to periodically audit all charges made by CONTRACTOR to CITY for services under this Agreement. Upon request, CONTRACTOR agrees to furnish CITY, or a designated representative, with necessary information and assistance needed to conduct such an audit.

CONTRACTOR agrees that CITY or its delegate will have the right to review, obtain and copy all records pertaining to performance of this Agreement. CONTRACTOR agrees to provide CITY or its delegate with any

relevant information requested and shall permit CITY or its delegate access to its premises, upon reasonable notice, during normal business hours for the purpose of interviewing employees and inspecting and copying such books, records, accounts, and other material that may be relevant to a matter under investigation for the purpose of determining compliance with this requirement. CONTRACTOR further agrees to maintain such records for a period of three (3) years after final payment under this Agreement.

ARTICLE 4 **MISCELLANEOUS PROVISIONS**

Section 4.1 Nondiscrimination

In performing services under this Agreement, CONTRACTOR shall not discriminate in the employment of its employees or in the engagement of any sub CONTRACTOR on the basis of race, color, religion, sex, sexual orientation, marital status, national origin, ancestry, age, or any other criteria prohibited by law.

Section 4.2 ADA Compliance

In performing services under this Agreement, CONTRACTOR shall comply with the Americans with Disabilities Act (ADA) of 1990, and all amendments thereto, as well as all applicable regulations and guidelines issued pursuant to the ADA.

Section 4.3 Indemnification and Responsibility for Damage

CONTRACTOR to the fullest extent permitted by law, shall indemnify and hold harmless CITY, its elected and appointed officials, directors, officers, employees and volunteers from and against any claims, damages, losses, and expenses (including reasonable attorney's fees and costs), arising out of performance of the services to be performed under this Agreement, provided that any such claim, damage, loss, or expense is caused by the negligent acts, errors or omissions of CONTRACTOR, any subcontractor employed directly by CONTRACTOR, anyone directly or indirectly employed by any of them, or anyone for whose acts they may be liable, except those injuries or damages arising out of the active negligence, sole negligence, or sole willful misconduct of the City of Lodi, its elected and appointed officials, directors, officers, employees and volunteers. CITY may, at its election, conduct the defense or participate in the defense of any claim related in any way to this indemnification. If CITY chooses at its own election to conduct its own defense, participate in its own defense, or obtain independent legal counsel in defense of any claim related to this indemnification, CONTRACTOR shall pay all of the costs related thereto, including without limitation reasonable

attorney fees and costs. The defense and indemnification obligations required by this Agreement are undertaken in addition to, and shall not in any way be limited by the insurance obligations set forth herein.

Section 4.4 No Personal Liability

Neither the City Council, nor any other officer or authorized assistant or agent or City employee shall be personally responsible for any liability arising under this Agreement.

Section 4.5 Responsibility of CITY

CITY shall not be held responsible for the care or protection of any material or parts of the work described in the Scope of Services prior to final acceptance by CITY, except as expressly provided herein.

Section 4.6 Insurance Requirements for CONTRACTOR

CONTRACTOR shall take out and maintain during the life of this Agreement, insurance coverage as set forth in Exhibit C attached hereto and incorporated by this reference.

Section 4.7 Successors and Assigns

CITY and CONTRACTOR each bind themselves, their partners, successors, assigns, and legal representatives to this Agreement without the written consent of the others. CONTRACTOR shall not assign or transfer any interest in this Agreement without the prior written consent of CITY. Consent to any such transfer shall be at the sole discretion of CITY.

Section 4.8 Notices

Any notice required to be given by the terms of this Agreement shall be in writing signed by an authorized representative of the sender and shall be deemed to have been given when the same is personally served or upon receipt by express or overnight delivery, postage prepaid, or three (3) days from the time of mailing if sent by first class or certified mail, postage prepaid, addressed to the respective parties as follows:

To CITY: City of Lodi
221 West Pine Street
P.O. Box 3006
Lodi, CA 95241-1910
Attn: John R. Della Monica, Jr.

To CONTRACTOR: Bickford Ventures, Inc., dba Division 1 Construction
Management Services
221 W. Oak Street, Ste. B
Lodi, CA 95240
Attn: Paul Bickford

Section 4.9 Cooperation of CITY

CITY shall cooperate fully and in a timely manner in providing relevant information it has at its disposal relevant to the Scope of Services.

Section 4.10 CONTRACTOR is Not an Employee of CITY

CONTRACTOR agrees that in undertaking the duties to be performed under this Agreement, it shall act as an independent contractor for and on behalf of CITY and not an employee of CITY. CITY shall not direct the work and means for accomplishment of the services and work to be performed hereunder. CITY, however, retains the right to require that work performed by CONTRACTOR meet specific standards without regard to the manner and means of accomplishment thereof.

Section 4.11 Termination

CITY may terminate this Agreement, with or without cause, by giving CONTRACTOR at least ten (10) days written notice. Where phases are anticipated within the Scope of Services, at which an intermediate decision is required concerning whether to proceed further, CITY may terminate at the conclusion of any such phase. Upon termination, CONTRACTOR shall be entitled to payment as set forth in the attached Exhibit B to the extent that the work has been performed. Upon termination, CONTRACTOR shall immediately suspend all work on the Project and deliver any documents or work in progress to CITY. However, CITY shall assume no liability for costs, expenses or lost profits resulting from services not completed or for contracts entered into by CONTRACTOR with third parties in reliance upon this Agreement.

Section 4.12 Confidentiality

CONTRACTOR agrees to maintain confidentiality of all work and work products produced under this Agreement, except to the extent otherwise required by law or permitted in writing by CITY. CITY agrees to maintain confidentiality of any documents owned by CONTRACTOR and clearly marked by CONTRACTOR as “Confidential” or “Proprietary”, except to the extent otherwise required by law or permitted in writing by CONTRACTOR. CONTRACTOR acknowledges that CITY is subject to the California Public Records Act.

Section 4.13 Applicable Law, Jurisdiction, Severability, and Attorney’s Fees

This Agreement shall be governed by the laws of the State of California. Jurisdiction of litigation arising from this Agreement shall be venued with the San Joaquin County Superior Court. If any part of this Agreement is found to conflict with applicable laws, such part shall be inoperative, null, and void insofar as it is in conflict with said laws, but the remainder of this Agreement shall be in force and effect. In the

event any dispute between the parties arises under or regarding this Agreement, the prevailing party in any litigation of the dispute shall be entitled to reasonable attorney's fees from the party who does not prevail as determined by the San Joaquin County Superior Court.

Section 4.14 City Business License Requirement

CONTRACTOR acknowledges that Lodi Municipal Code Section 3.01.020 requires CONTRACTOR to have a city business license and CONTRACTOR agrees to secure such license and pay the appropriate fees prior to performing any work hereunder.

Section 4.15 Captions

The captions of the sections and subsections of this Agreement are for convenience only and shall not be deemed to be relevant in resolving any question or interpretation or intent hereunder.

Section 4.16 Integration and Modification

This Agreement represents the entire understanding of CITY and CONTRACTOR as to those matters contained herein. No prior oral or written understanding shall be of any force or effect with respect to those matters covered hereunder. This Agreement may not be modified or altered except in writing, signed by both parties.

Section 4.17 Contract Terms Prevail

All exhibits and this Agreement are intended to be construed as a single document. Should any inconsistency occur between the specific terms of this Agreement and the attached exhibits, the terms of this Agreement shall prevail.

Section 4.18 Severability

The invalidity in whole or in part of any provision of this Agreement shall not void or affect the validity of any other provision of this Agreement.

Section 4.19 Ownership of Documents

All documents, photographs, reports, analyses, audits, computer media, or other material documents or data, and working papers, whether or not in final form, which have been obtained or prepared under this Agreement, shall be deemed the property of CITY. Upon CITY's request, CONTRACTOR shall allow CITY to inspect all such documents during CONTRACTOR's regular business hours. Upon termination or completion of services under this Agreement, all information collected, work product and documents shall be delivered by CONTRACTOR to CITY within ten (10) calendar days.

CITY agrees to indemnify, defend and hold CONTRACTOR harmless from any

liability resulting from CITY's use of such documents for any purpose other than the purpose for which they were intended.

Section 4.20 Authority

The undersigned hereby represent and warrant that they are authorized by the parties to execute this Agreement.

Section 4.21 Federal Transit Funding Conditions

If the box at left is checked, the Federal Transit Funding conditions attached as Exhibit D apply to this Agreement. In the event of a conflict between the terms of this Agreement or any of its other exhibits, and the Federal Transit Funding Conditions, the Federal Transit Funding Conditions will control.

Section 4.22 Counterparts and Electronic Signatures

This Agreement and other documents to be delivered pursuant to this Agreement may be executed in one or more counterparts, each of which will be deemed to be an original copy and all of which, when taken together, will be deemed to constitute one and the same agreement or document, and will be effective when counterparts have been signed by each of the parties and delivered to the other parties. Each party agrees that the electronic signatures, whether digital or encrypted, of the parties included in this Agreement are intended to authenticate this writing and to have the same force and effect as manual signatures. Delivery of a copy of this Agreement or any other document contemplated hereby, bearing an original manual or electronic signature by facsimile transmission (including a facsimile delivered via the Internet), by electronic mail in "portable document format" (".pdf") or similar format intended to preserve the original graphic and pictorial appearance of a document, or through the use of electronic signature software will have the same effect as physical delivery of the paper document bearing an original signature.

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IN WITNESS WHEREOF, CITY and CONTRACTOR have executed this Agreement as of the date first above written.

ATTEST:

CITY OF LODI, a municipal corporation

OLIVIA NASHED
City Clerk

SCOTT R. CARNEY
City Manager

APPROVED AS TO FORM:

BICKFORD VENTURES, INC., a California
corporation dba DIVISION 1
CONSTRUCTION MANAGEMENT
SERVICES

By: _____
KATIE O. LUCCHESI
City Attorney



By: _____
Name: PAUL BICKFORD
Title: President

Attachments:

Exhibit A/B – Scope of Services & Fee Proposal

Exhibit C – Insurance Requirements

Exhibit D – Federal Transit Funding Conditions (if applicable)

**Funding Source: ARPA-22001.Contracts
(Business Unit & Account No.)**

Doc ID:

CA: Rev.07.2024-VS (CA Formatted)



DIVISION 01

Construction Management Services

**Lodi Access Center Qualification Statement and Proposal for
Construction for Construction Management and
Construction testing and Special Inspection services**

Attn: John Della Monica

City of Lodi Community Development Dept.

221 W. Pine St. Lodi CA

221 W. Oak St Suite B

Lodi, CA 95240

Principal Contact: Paul Bickford, Owner

Phone: (209) 330-0158

Email: paul@division01cms.com

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1. Cover Letter / General Information

July 3, 2024

City of Lodi
Community Development Department
Attn: John Della Monica
221 W. Pine St.
PO Box 3006
Lodi, Ca 95241-1910

RE : Construction Management Services Proposal for the **Lodi Access Center and Emergency Shelter Project**
(Lodi Access Center)

Dear John Della Monica,

Thank you for considering Division 01 Construction Management Services as a candidate for your construction management services. Our team is committed to placing the City of Lodi and the Lodi Access Center in the best interest at the forefront of every decision we make. The City will benefit from our exceptional services, experience and consistent professional environment. We thoroughly understand the services you're seeking and feel confident in our ability and experience to help you complete this project successfully in accordance with your objectives of safety, cost, time, and quality.

Division 01 recognizes the City's needs and goals. We understand that the City is looking for a partner and extension of its team. We are confident that Division 01 can fill that need.

Division 01 Construction Management Services provides a full range of services and resources from the earliest planning stages through final project closeout. Our goal is to relieve the City of Lodi, Lodi Access Center staff and the Architect of the daily routine associated with project management while keeping you abreast of progress and key issue developments. This ensures that your scope, quality, safety, cost and schedule objectives are achieved.

Typical Services include but not limited to:

Bid Time, our team will be present for pre-bid conferences, job site walks, bid evaluations as well as help with contract negotiations. And finally, we will provide a recommendation for award and assist in the construction contract process to create a seamless transition to on-site construction.

Construction Phase, will be in accordance with and follow the requirements listed in the RFP June 20th 2024 to include **Construction Management, Construction Testing and Special Inspection Services**.

Close Out: Through the final stage of the project's closeout and occupancy, Division 01 will assist with final inspections, punch list creation, corrective actions as necessary, notice of completion, review of warranties and O&M's, as built drawings, and final project accounting, including final project approval.

Specific inclusions:

- Paul Bickford is owner/President of Division 01 CMS and is **authorized signer to bind** Division 01 CMS contractually.
- This proposal from Division 01 CMS for the City of Lodi and the Lodi Access Center project is **good for 60 days** from the bid date of April 18, 2024.
- Division 01 CMS is **willing to perform services as described in the RFP.**
- Proposer has **staff and other required resources available for performing all services and deliverables** within the RFP.

Please feel free to contact Paul Bickford directly at c-(209) 224-7040, o-(209) 330-0158 Ext #1, or Paul@division01cms.com if you have any questions or need any further clarifications.

Legal Structure: Bickford Ventures, Inc is DBA Division 01 Construction Management Services.
EIN # 82-176285

2. Executive Summary

1. Type of Business and number of years.
 - a. S-Corporation "Bickford Ventures Inc, DBA Division 01 Construction Management Services.
 - b. Division 01 Construction Management Services has been providing construction management services to public agency clients since April 2017, (7 years). Each team member has an extensive history and experience with public agency clients ranging from the last 10 years to 40+ years.
2. California business, professional, or specialty license. License number and FEIN
 - a. Paul Bickford, President of Division 01 Construction Management Service
 - b. Paul Bickford has two (2) active General contractor's license(s). License numbers 838586 and 1108846. However, this license will not be necessary nor used or required for the purpose of this RFP.
 - c. Division 01 Construction Management Services holds a business license.
 - d. Our FEIN is 82-1762857
3. Location of Proposer's office
 - a. Physical address of office: 221 W Oak St. Suite B, Lodi, CA 95240
 - b. Business Mailing address: PO Box 771. Lockeford. CA 95237
4. Staffing
 - a. **Paul Bickford** is available for immediate assignment and will be your primary point of contact and initially the primary onsite representative. This will continue until satisfactory staffing needs are evaluated and the team is in place.
 - b. **Denise Wiman / Miguel Vilamontes**, will work in cadence with the team including necessary site visits to familiarize themselves with the project site. Attending meetings virtually or in person as necessary. Monitor, distribute and e-file documents as required.
 - c. **Colton Bickford**, is available for additional support and project oversight as needed.
5. Insurance: Division 01 is aware of the insurance as required by the City of Lodi and will provide documents upon acceptance of proposal.
 - a. Commercial General Liability, Professional Liability (E&O), Commercial Auto and Workers Compensation.
6. Our geographic area of coverage
 - a. **Division 01 and Terracon Inc, are both local companies of Lodi. We can provide prompt response times as well as keep travel hours to a minimum.**
7. Ensuring proper responsiveness to City Staff and project requirements
 - a. As stated above, we believe strongly in communication. We plan to utilize this approach in face-to-face meetings, video conferences, and file sharing as best suited for the situation.



Paul Bickford
President & Senior Construction
Manager



Summary of Qualifications

Paul Bickford has 45+ years in the construction industry providing him an in depth knowledge of construction. Self performing trades of concrete and framing in the 70's & 80's, General Contractors License in 1991 (624843) and 2004 (838586), SR project manager for Diede Construction 1997-2016. 90% of projects being public works projects during that time. From modernization to new construction, over 200 projects ranging from \$100,000's to \$20M, for different entities and all phases of construction including pre-design to project closeout. Spending most of his career on the contractor side of projects provides a unique problem solving mindset and knowledge.

Paul created Division 01 Construction Management Services in April of 2017. Using 4 decades of experience as a contractor to now identifying the need for information and communication in the bid documents, estimating and budget control, oversight of construction, quality control and negotiations for the owners and to assist contractors to both be succesful. Our Company has grown to include Seasoned Veterens of the industry.

Honor and integrity is not just a logo on the wall, it's how we do business.

Recent and Current Division 01 CMS projects.

Typical services include assisting the owner and design team with Constructability review, Bid Process, Contract negotiations, Course of construction PM/CM duties.

Valley Caps

Care facility for Adults with Developmental Disabilities. This is currently in Design and will be a Tennant improvement project of an existing facility in Downtown Modesto.

Modesto Children's Museum

Conversion of existing restaurant/bar to two story Children's Museum. \$3.5M construction contract. Completed Fall of 2023

Pietro's Restaurant

Owners Rep/Construction Manager of the new 10,000sqft, \$10M new restaurant. This past year in design/permitting/bidding, tentative start of construction August 2024

Stanislaus County

Currently assisting Stanislaus County on 4 new projects.

Probation Security Electronics upgrade \$3M construction budget. (in the mobilization stage)

Harvest Hall Tennant improvement \$3M construction budget. (in design and funding review)

Salida Library Circulation Tennant Improvement (T.I.) \$1M construction budget. (NTP approx. august 1st)

Modesto Library T.I. \$20M budget. (Design Development Phase)

Manteca Fire Station #5: (Complete)A 7,000 sq. ft. Design/Build, Fire Station with a contract budget of \$4,5M..

Our office is 221 W. Oak St Lodi, we work and support our local community. Our close proximity to the project and provides a quick onsite response if needed while keeping the billable hours down.

Certifications

Contractor's License
 #838586

OSHA 10

Affiliations

USMC

Member of Rotary
 International

Trainings

LEED course study

Project Management
 UCD Extension

Primavera Scheduling

Construction
 Management
 Professional Courses

City of Lodi
Request for Proposal
Construction Management and Construction Testing & Special Inspection Services
Lodi Access Center and Emergency Shelter Project

June 20, 2024

The City of Lodi is seeking Qualification Statements and Pricing Proposals for the furnishing of Construction Management, quality assurance testing, inspection and related laboratory services during the construction of the Lodi Access Center and Emergency Shelter Project

All pertinent information is enclosed.

Qualification Statements and RFP Pricing Proposals must be complete and submitted to:

CITY OF LODI
COMMUNITY DEVELOPMENT DEPARTMENT
ATTN: JOHN DELLA MONICA
221 WEST PINE STREET
P.O. BOX 3006
LODI, CA 95241-1910

ALL QUALIFICATION STATEMENTS AND RFP PRICING PROPOSALS MUST BE IN A SEALED ENVELOPE AND CLEARLY MARKED AS FOLLOWS:

1. LODI ACCESS CENTER QUALIFICATION STATEMENTS AND PROPOSAL FOR CONSTRUCTION MANAGEMENT AND CONSTRUCTION TESTING & SPECIAL INSPECTION SERVICES.

ALL QUALIFICATIONS AND PRICING PROPOSALS MUST BE RECEIVED NO LATER THAN 4:00 P.M. ON FRIDAY, JULY 5, 2024 (Revised).

Proposals must be signed and dated. No telephone or telegraphic proposals will be accepted. Any proposal received after the deadline will not be considered regardless of postmark or reason for late delivery.

Sincerely,

John Della Monica
Community Development Director

Attachments

Lodi Access Center
Construction Management and Construction Testing & Special Inspection Services RFP

I. Lodi Access Center:

- A. General Information
 - 1. Designer: NJ Associates
 - 2. Approximately 23,000 Square Feet
 - 3. Construction cost estimate - \$9,000,000
 - 4. Construction Duration – 301-334 Calendar Days (10-11 Months)

II. Services:

- A. Construction Management:
 - 1. Project Administration
 - 2. Weekly meetings
 - 3. RFI, Submittal & CO Logs
 - 4. Pay Request Approval/processing
 - 5. City Staff Meetings as necessary
 - 6. Monthly Project Status Report to Public Works Director
 - 7. Other Typical CM Activities as required
- B. Construction Testing & Special Inspection Services:
 - 1. Perform required Special Inspections and construction materials testing

III. Proposal: Breakdown by Estimate

- A. CM Services:
 - 1. Typical hourly labor rates & fees with estimated total budget
- B. Construction Testing & Special Inspections Services:
 - 1. Hourly labor rates & Testing services fees with estimated total budget
Total Estimated contract amount including all services. Work will be billed monthly on a Time and Materials basis.

IV. Attachments:

- A. Typical City Services PSA
- B. Typical Insurance Requirements Exhibit "C"
- C. Plans – Full Set (<https://get.massive.app/01J1X2N6BTND8JAXMRGE3DZYZF?secret=ZthtkMspQEVwApKX&lang=system>)

Cost Proposal Hourly Labor Rates and Detail

Mr. Della Monica, thank you for the request for proposal and opportunity for Division 01 CMS (Construction Management Services) to provide services.

Proposal Estimate and Scope

Scope:

Services provided in “complete” accordance with and as outlined in the City of Lodi Request for Proposal dated 6/20/2024. For construction management (CM) services, Construction Testing and Special inspection and related laboratory services of the Lodi Access Center and Emergency Shelter.

Proposal – “Estimated” Total Budget: \$182,200.00

Inclusive of CM Services, Construction testing, Special inspection and laboratory services based on the information provided in the 6/20/2024 RFP.

Please note that we have provided a cost estimate sheet showing anticipated hours to identify how we have arrived at this total. The services are billed Hourly and labor rates are provided below.

Information utilized from the RFP for this proposal.

- Approximate construction cost estimate of \$9,000,000.00
- Approximately 23,000 square Feet
- NJA plan set dated 4.16.2024 “Plan Check check #1”.
- Construction period **301-3034 calendar days.**

Closeout period of 30 days included in estimate. (punch list/documents & financial closeout)

Additional information.

- Division 01 CMS will contract, coordinate and manage Construction testing, inspection and laboratory services utilizing **Terracon Consultants Inc.**

Note from Terracon*- *As you review this proposal, keep in mind, the total estimated hours can be much less or exceed these estimates, due to circumstances out of Terracon’s control due to manpower in welding shops, weather related events, and contractor scheduling, etc. at each phase or portion of work. Our goal though, is to always to use multi certified inspectors on site when possible, to maximize inspection efficiency, while minimizing inspection costs to our client, and to always make every effort to come in under budget and our client completely satisfied. When you’re happy, we’re happy.*

Potential Staffing and Key Personnel

Final Staffing will continue to adapt with the project and will include input and agreement of the City.

- **Paul Bickford, Sr Construction Manager**, will be your primary point of contact initially. This will continue until satisfactory permanent staffing needs are evaluated and the team is in place.
- **Denise Wiman, Construction Manager**
- **Miguel Viramontes, Project Engineer, Office Administrative Support.**
- **Bob Bettencourt, Construction Manager, Supervisor** will work in cadence with team from office and field as may be necessary.
- **Additional Staff**, TBD and will be dependent on the type of service needed.

Exclusions:

- Temp Facilities, Utilities, Labor, security, all of which can be separately contracted at cost plus 15%.
- Prevailing wage on Division 01 services.
 - **Prevailing wage will apply to onsite testing and inspection services.**
- Payment and performance bonds

Division 01 Construction Management hourly rate of service:

Hourly rate	Title
\$160	Sr. Construction Manager/Owner (Paul Bickford)
\$145	Construction Manager
\$130	Supervisor
\$95	Project Engineer / Office Administrator

Terracon Consulting, Inc. rates and estimated budget attached as **Exhibit B**. Services will be invoiced at **cost plus 10%**. The estimated cost is included in the proposed “estimated total budget” as noted above.

Should the need to extend services beyond this period be requested the hourly rates listed will be utilized. No additional hours without prior written authorization.


Paul Bickford
President/Sr. Construction Manager
Bickford Ventures Inc. DBA
Division 01 Construction Management Services

Exhibit B



Fee Estimate

Materials Services

Lodi Access Center

Terracon Proposal No. PNA241277

DESCRIPTION	RATE	QUANTITY	UNITS	TRIPS	TOTAL QUANTITY	TOTAL
Special Inspections and Testing						
Earthwork						
PW Group 3 -Field Engineering Technician	\$ 125.00	4.00	hours	10	40.00	\$ 5,000.00
Daily Field Report	\$ 90.00	1.00	each	10	10.00	\$ 900.00
Nuc Gauge Equip.	\$ 45.00	1.00	day	10	10.00	\$ 450.00
Sub Total						\$ 6,350.00
Concrete						
PW Group 2 - Certified ICC/AWS Inspector	\$ 135.00	4.00	hours	6	24.00	\$ 3,240.00
Daily Field Report	\$ 90.00	1.00	each	6	6.00	\$ 540.00
Sub Total						\$ 3,780.00
Reinforcing						
PW Group 2 - Certified ICC/AWS Inspector	\$ 135.00	4.00	hours	4	16.00	\$ 2,160.00
Daily Field Report	\$ 90.00	1.00	each	4	4.00	\$ 360.00
Sub Total						\$ 2,520.00
Masonry						
PW Group 2 - Certified ICC/AWS Inspector	\$ 135.00	4.00	hours	2	8.00	\$ 1,080.00
Daily Field Report	\$ 90.00	1.00	each	2	2.00	\$ 180.00
Sub Total						\$ 1,260.00
Structural Steel (Welding & Bolting)						
PW Group 2 - Certified ICC/AWS Inspector	\$ 140.00	8.00	hours	8	64.00	\$ 8,960.00
Daily Field Report	\$ 90.00	1.00	each	8	8.00	\$ 720.00
Sub Total						\$ 9,680.00
Anchor Installation						
PW Group 4 - Engineering Technician	\$ 120.00	4.00	hours	2	8.00	\$ 960.00
Daily Field Report	\$ 90.00	1.00	each	2	2.00	\$ 180.00
Sub Total						\$ 1,140.00
Sample pick Up						
Engineering Technician	\$ 105.00	2.00	hours	4	8.00	\$ 840.00
Sub Total						\$ 840.00
Laboratory Services						
Modified Proctor	\$ 285.00	3.00	tests	1	3.00	\$ 855.00
Compressive Strength of 4" x 8" Cylinder	\$ 30.00	30.00	tests	1	30.00	\$ 900.00
Compressive Strength of 3x6 inch Grout Prism	\$ 45.00	6.00	tests	1	6.00	\$ 270.00
Skidmore Bolt Testing (set of 3)	\$ 295.00	1.00	each	1	1.00	\$ 295.00
Sub Total						\$ 2,320.00
Project Administration						
Project Engineer	\$ 225.00	2.00	hours	1	2.00	\$ 450.00
Project Manager	\$ 150.00	4.00	hours	1	4.00	\$ 600.00
Clerical / Admin. Support	\$ 90.00	3.00	hours	1	3.00	\$ 270.00
Sr. Admin / PW Administrator	\$ 105.00	2.00	hours	1	2.00	\$ 210.00
Pad Certification Letter	\$ 250.00	1.00	each	1	1.00	\$ 250.00
Final Letter of Compliance	\$ 350.00	1.00	each	1	1.00	\$ 350.00
Sub Total						\$ 2,130.00
Sub Total						\$ 30,020.00
Total						\$ 30,020.00

Consultant Estimating

Lodi Access Center

7/3/2024

Description	Hours per week	# of occurrences	Days	Weeks	Months	Total hours	Rate	Total
Design/ Bid Phase						4	1	
Review Scopes and proposal	10	1				10	\$ 165.00	\$ 1,650.00
Assistant PM hours	10	1				10	\$ 165.00	\$ 1,650.00
							\$	-
							\$	-
Subtotals								\$ 3,300.00

Construction Phase						47.3	11	\$ -	\$ -
Weekly site visits. (4 trips per week, est min 1.5 hour includes travel)	6					283.8	\$ 165.00	\$ 46,827.00	
Weekly OAC meeting	2					94.6	\$ 165.00	\$ 15,609.00	
Administration, RFI, submittal, PCO, permitting, inspection.	5					236.5	\$ 150.00	\$ 35,475.00	
Pay application review (once a month, back and forth)	1.5				17	25.5	\$ 165.00	\$ 4,207.50	
Office administration and support	5					236.5	\$ 90.00	\$ 21,285.00	
						0	\$ -	\$ -	
								\$ 123,403.50	

Close out period						9		\$ -
warranty, submittals, payments, as-builts	15					135	\$ 165.00	\$ 22,275.00
punch list preparation and follow up.							\$	-
Final payment review and approval							\$	-
Assistant						0	\$	-
							\$	-
							\$	-
							\$	-
							\$	-
							\$	-
								\$ 22,275.00

Totals	12.44	53.56		60.3	14	749.9		\$ 148,978.50
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Subconsultants	Lump Sum					0	7%	\$ -
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Terracon	Terracon Estimate	Division 01 Mark Up		
Special inspection, testing and Lab	\$ 30,202.00	7%	\$ -	\$ -
		10%	\$ 3,020.20	\$ 33,222.20
Terracon +Div 01 markup Subtotals				\$ 33,222.20
Division 01 only Subtotals				\$ 148,978.50

Estimated total Contract Value								\$ 182,200.70
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EXHIBIT C

NOTE: The City of Lodi is now using the online insurance program PINS Advantage. Once you have been awarded a contract you will receive an email from the City's online insurance program requesting you to forward the email to your insurance provider(s) to submit the required insurance documentation electronically

Insurance Requirements for Professional Services

Contractor shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder and the results of that work by the Contractor, his agents, representatives, employees or subcontractors.

MINIMUM SCOPE AND LIMIT OF INSURANCE

Coverage shall be at least as broad as:

1. **Commercial General Liability (CGL):** Insurance Services Office Form CG 00 01 covering CGL on an "occurrence" basis, including products and completed operations, property damage, bodily injury and personal & advertising injury with limits no less than **\$1,000,000** per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 or 25 04) or the general aggregate limit shall be twice the required occurrence limit.
2. **Automobile Liability:** ISO Form Number CA 00 01 covering any auto or if Contractor has no owned autos, then hired, and non-owned autos with limit no less than **\$1,000,000** per accident for bodily injury and property damage.
3. **Workers' Compensation:** as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than **\$1,000,000** per accident for bodily injury or disease.
4. **Professional Liability (Errors and Omissions)** Insurance appropriate to the Consultant's profession, with limits not less than **\$1,000,000** per occurrence or claim, \$2,000,000 aggregate. May be waived by Risk Manager depending on the scope of services.

Other Insurance Provisions:

- (a) **Additional Named Insured Status**
The City of Lodi, its elected and appointed boards, commissions, officers, agents, employees, and volunteers are to be covered as additional insureds on the CGL and auto policy with respect to liability arising out of work or operations performed by or on behalf of the Contractor including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to the Contractor's insurance (at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; **and** CG 20 37 if a later edition is used
- (b) **Primary and Non-Contributory Insurance Endorsement**
The limits of insurance coverage required may be satisfied by a combination of primary and umbrella or excess insurance. For any claims related to this contract, the Contractor's insurance coverage shall be primary coverage **at least as broad as** ISO CG 20 01 04 13 as respects the Entity, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by the Entity, its officers, officials, employees, or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.
- (c) **Waiver of Subrogation** Contractor hereby grants to City of Lodi a waiver of any right to subrogation which any insurer of said Contractor may acquire against the City of Lodi by virtue of the payment of any loss under such insurance. Contractor agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the City of Lodi has received a waiver of subrogation endorsement from the insurer

NOTE: (1) The street address of the **CITY OF LODI** must be shown along with (a) and (b) and (c) above: 221 West Pine Street, Lodi, California, 95240; (2) The insurance certificate must state, on its face or as an endorsement, a description of the **project** that it is insuring.

- (d) **Severability of Interest Clause**
The term "insured" is used severally and not collectively, but the inclusion herein of more than one insured shall not operate to increase the limit of the company's liability under the Contractors commercial general liability and automobile liability policies.
- (e) **Notice of Cancellation or Change in Coverage Endorsement**
This policy may not be canceled nor the coverage reduced by the company without 30 days' prior written notice of such cancellation or reduction in coverage to the Risk Manager, City of Lodi, 221 West Pine St., Lodi, CA 95240.

- (f) Continuity of Coverage
All policies shall be in effect on or before the first day of the Term of this Agreement. At least thirty (30) days prior to the expiration of each insurance policy, Contractor shall furnish a certificate(s) showing that a new or extended policy has been obtained which meets the minimum requirements of this Agreement. Contractor shall provide proof of continuing insurance on at least an annual basis during the Term. If Contractor's insurance lapses or is discontinued for any reason, Contractor shall immediately notify the City and immediately obtain replacement insurance. Contractor agrees and stipulates that any insurance coverage provided to the City of Lodi shall provide for a claims period following termination of coverage which is at least consistent with the claims period or statutes of limitations found in the California Tort Claims Act (California Government Code Section 810 et seq.).
- (g) Failure to Comply
If Contractor fails or refuses to obtain and maintain the required insurance, or fails to provide proof of coverage, the City may obtain the insurance. Contractor shall reimburse the City for premiums paid, with interest on the premium paid by the City at the maximum allowable legal rate then in effect in California. The City shall notify Contractor of such payment of premiums within thirty (30) days of payment stating the amount paid, the name(s) of the insurer(s), and rate of interest. Contractor shall pay such reimbursement and interest on the first (1st) day of the month following the City's notice. Notwithstanding any other provision of this Agreement, if Contractor fails or refuses to obtain or maintain insurance as required by this agreement, or fails to provide proof of insurance, the City may terminate this Agreement upon such breach. Upon such termination, Contractor shall immediately cease use of the Site or facilities and commence and diligently pursue the removal of any and all of its personal property from the site or facilities.
- (h) Verification of Coverage
Consultant shall furnish the City with a copy of the policy declaration and endorsement page(s), original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this clause. All certificates and endorsements are to be received and approved by the City before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Consultant's obligation to provide them. The City reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time. **Failure to exercise this right shall not constitute a waiver of the City's right to exercise after the effective date.**
- (i) Self-Insured Retentions
Self-insured retentions must be declared to and approved by the City. The City may require the Consultant to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or City.
- (j) Insurance Limits
The limits of insurance described herein shall not limit the liability of the Contractor and Contractor's officers, employees, agents, representatives or subcontractors. Contractor's obligation to defend, indemnify and hold the City and its officers, officials, employees, agents and volunteers harmless under the provisions of this paragraph is not limited to or restricted by any requirement in the Agreement for Contractor to procure and maintain a policy of insurance.
- (k) Subcontractors
Consultant shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Consultant shall ensure that City is an additional insured on insurance required from subcontractors
- (l) Claims Made Policies
If any of the required policies provide coverage on a claims-made basis:
1. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.
2. Insurance must be maintained and evidence of insurance must be provided for **at least** five (5) years after completion of the contract of work.
3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the Consultant must purchase "extended reporting" coverage for a minimum of five (5) years after completion of contract work.
- (m) Qualified Insurer(s)
All insurance required by the terms of this Agreement must be provided by insurers licensed to do business in the State of California which are rated at least "A-, VI" by the AM Best Ratings Guide, and which are acceptable to the City. Non-admitted surplus lines carriers may be accepted provided they are included on the most recent list of California eligible surplus lines insurers (LESLI list) and otherwise meet City requirements.