



**MASTER AGREEMENT FOR CONSTRUCTION
MANAGEMENT SERVICES**

WITH

INNOVATIVE CONSTRUCTION SERVICES, INC.

SEPTEMBER 3, 2020

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MASTER AGREEMENT FOR CONSTRUCTION MANAGEMENT SERVICES

This Master Agreement for Construction Management Services ("Agreement") is made as of September 3, 2020, between the Davis Joint Unified School District, a California public school district ("District"), and Innovative Construction Services, Inc. ("Construction Manager") (both collectively "Parties"), for the provision of construction management services in connection with the District's Measure M capital facilities program ("Program"), as described in **Exhibit "A"** and any Project Authorizations issued pursuant to the terms of this Agreement ("Project(s)").

Scopes of work under this Agreement shall be assigned pursuant to Project Authorizations. Any one of the Project Authorizations or combination thereof may be changed, including terminated, as indicated herein, without changing in any way the remaining Project Authorization(s) or this Agreement. The provisions of this Agreement shall apply to each Project Authorization without regard to the status of the remaining Project Authorization(s). Construction Manager shall invoice for each Project Authorization separately and District shall compensate Construction Manager for each Project Authorization separately on a proportionate basis based on the level and scope of work completed for the scope of work set forth in that Project Authorization.

For and in consideration of the mutual covenants herein contained, the Parties hereto agree as follows:

ARTICLE 1. Definitions

- 1.1 In addition to the definitions above, the following definitions for words or phrases shall apply when used in this Agreement, including all Exhibits:
 - 1.1.1 **Agreement:** The Agreement consists exclusively of this document and all identified exhibits attached and incorporated by reference.
 - 1.1.2 **Architect, Design Professional in General Responsible Charge:** The architect(s) that the District designates as being the architect(s) for all or a portion of the Project, including all consultants to the Architect(s).
 - 1.1.3 **As-Built Drawings ("As-Builts"):** Any document prepared and submitted by District Contractor that details on a Conforming Set, the actual construction performed during the Project, including changes necessitated by Construction Change Documents and change orders, and detailed by the District's construction Contractor on a Conforming Set.
 - 1.1.4 **Board:** The District's Governing Board.
 - 1.1.5 **Conforming Set:** The plans, drawings, and specifications at the end of the Bidding Phase that incorporate all addenda, if any, issued during the Bidding Phase. The Construction Manager shall ensure

the DSA has approved all Bid Set Construction Documents revisions that are incorporated onto the Conforming Set and for which DSA approval is required.

- 1.1.6 **Construction Budget:** The total amount indicated by the District for the Project plus all other costs, including design, construction, administration, financing, and all other costs.
- 1.1.7 **Construction Change Documents ("CCD"):** The documentation of changes to the DSA-approved construction documents.
- 1.1.8 **Construction Cost Budget:** The total cost to District of all elements of the Project designed or specified by the Architect, as adjusted during and at the end of the design phase in accordance with this Agreement and the Agreement for Architectural Services. The Construction Cost Budget does not include the compensation of the Project Design Team, the Program Manager (if any), the Construction Manager and any subconsultants, the cost of the land, rights-of-way, or financing which are the responsibility of the District.
- 1.1.9 **Construction Documents:** The plans, drawings, and specifications approved by DSA that the District can use for the Notice to Bidders or Requests for Proposal for the Project's construction.
- 1.1.10 **Construction Manager:** The entity listed in the first paragraph of this Agreement.
- 1.1.11 **Consultant(s):** Any and all consultant(s), sub-consultant(s), subcontractor(s), or agent(s) to the Construction Manager.
- 1.1.12 **Contractor:** One or more licensed and registered contractors under contract with the District for construction of all or a portion of the Project.
- 1.1.13 **Design Team:** The Architect(s) that the District designates as being the architect(s) for all or a portion of the Project, including all consultants to the Architect(s), plus all engineer(s) or other designer(s), who have a responsibility to the District to design all or a portion of the Project either directly or as a subconsultant or subcontractor.
- 1.1.14 **DIR:** California Department of Industrial Relations.
- 1.1.15 **District:** The Davis Joint Unified School District.

- 1.1.16 **District's Representative:** The individual identified herein that is authorized to act on the District's behalf with respect to the Project. The initial District's Representative shall be David Burke, Director of Facilities, Maintenance & Operations. District may change the District's Representative by notice as set forth herein.
- 1.1.17 **DSA:** Division of the State Architect in the California Department of General Services.
- 1.1.18 **Extra Services:** District-authorized Services outside of the scope in **Exhibit "A"** or District-authorized reimbursables not included in Construction Manager's fee.
- 1.1.19 **Fee:** The Construction Manager's Fee is defined in Section 6.1, payable as set forth in Article 6 and in **Exhibit "D."**
- 1.1.20 **Program Manager:** Any program manager hired to perform program management services for the District, including all consultant(s) to the Program Manager. If no Program Manager is hired by the District for the Project, then all references to "Program Manager" shall be read and interpreted as the District.
- 1.1.21 **Project Inspector, Inspector of Record, IOR:** The agent of the DSA at the project site whose primary responsibility will be to insure that the project is constructed in compliance with current codes; DSA-approved plans and specifications relating to fire life safety, structure, and accessibility; and quality controls required of a public works facility. The IOR will report to both the DSA and the Architect.
- 1.1.22 **Record Drawings:** A final set of drawings prepared by the Architect incorporating all changes from all As-Built, sketches, details, and clarifications.
- 1.1.23 **Service(s):** All labor, materials, supervision, services, tasks, and work that the Construction Manager is required to perform and that are required by, or reasonably inferred from, the Agreement, and that are necessary for the design and completion of the Project.

ARTICLE 2. Scope, Responsibilities and Services of Construction Manager

- 2.1 **Scope:** Construction Manager shall provide the Services described herein and under **Exhibit "A"** for the Project.
- 2.2 **Standard of Care:** Construction Manager, its officers, agents, employees, subcontractors, Consultants and any persons or

entities for whom Construction Manager is responsible, shall provide all Services pursuant to this Agreement in accordance with the requirements of this Agreement and in a manner consistent with the standard of care under California law applicable to those who specialize in providing the same services to California public school districts for projects of the type, scope, and complexity of the Project. The District's review, approval of, or payment for any of the Services required under this Agreement shall not be construed as assent that Construction Manager has complied, nor in any way relieve the Construction Manager of compliance, with (i) the applicable standard of care, or (ii) applicable statutes, regulations, rules, guidelines and requirements.

- 2.3 **Coordination:** Construction Manager agrees to maintain coordination with District-designated representatives as may be requested and desirable. This shall include, without limitation, coordination with all members of the District's Design Team, the Project Inspector, and the Program Manager, if any. If the Construction Manager employs sub-consultant(s), the Construction Manager shall ensure that its contract(s) with its sub-consultant(s) include language incorporating the terms of this Agreement.
- 2.4 **Construction Manager as District Representative:** Construction Manager shall act as the District's agent to render the Services described in **Exhibit "A,"** which will commence upon the receipt of a Notice to Proceed signed by the District representative. Construction Manager's services will be completed in accordance with the schedule attached as **Exhibit "C."**
- 2.5 During the Construction Phase of the Project, the District may require that the Contractors submit all notices and communication relating to the Project directly to the Construction Manager.
- 2.6 **Review of General Obligation Bond Program Report and District's Facility Master Plan:** Construction Manager shall review the District's Facility Master Plan for the District and other written materials made available by the District to Construction Manager to understand fully the nature, extent and intent of the Facility Master Plan and the Project.
- 2.7 **Review of Measure M:** Construction Manager shall review Measure M and other written materials made available by the District to Construction Manager which relate to Measure M to fully understand the extent of funding available to implement the District's Master Facility Master Plan for the District, the anticipated schedule for issuance of Bonds under Measure M relative to the anticipated design, bidding and construction of projects.

ARTICLE 3. Construction Manager Staff

- 3.1 Construction Manager has been selected to perform the work herein because of the Construction Manager's skills and expertise of key personnel.

- 3.2 Construction Manager agrees that the following key personnel in Construction Manager's firm shall be associated with the Project and perform the Services in the following capacities:
- Project Executive: Eric Hartwell
- Project Director: Dave Fukui
- Senior Project Manager: Meredith Collins
- Project Manager: Rick Hureaux and Paul Borcharding
- Project Engineer: Stacy Gerdin
- 3.3 Construction Manager shall not change any of the key personnel listed above without the District's prior written approval, unless said personnel cease to be employed by Construction Manager. Regardless of the reason for the change in key personnel, District shall be allowed to interview and retains the right to approve replacement personnel.
- 3.4 If any designated lead or key person fails to perform to the satisfaction of the District, then upon written notice by the District, the Construction Manager shall immediately remove that person from the Project and provide a temporary replacement. Within seven (7) days of such removal, Construction Manager shall provide a permanent replacement person acceptable to the District.
- 3.4.1 All lead or key personnel for any Consultant must also be designated by the Consultant and are subject to all conditions stated in this Agreement.
- 3.5 Construction Manager represents that the Construction Manager has no existing interest and will not acquire any interest, direct or indirect, which could conflict in any manner or degree with the performance of services required under this Agreement. Construction Manager also agrees that no person having any such interest shall be employed by Construction Manager.

ARTICLE 4. Schedule of Work

Construction Manager shall commence work under this Agreement upon receipt of a Notice to Proceed. Construction Manager shall prosecute the Services diligently as described in **Exhibit "A"** in accordance with the schedule attached as **Exhibit "C."** Time is of the essence and failure of Construction Manager to perform work on time as specified in this Agreement is a material breach of this Agreement.

ARTICLE 5. Construction Cost Budget

- 5.1 Construction Manager shall have responsibility, along with the Architect, to develop, review, and reconcile the Construction Cost Budget with the Architect and the District throughout the design process and construction, if directed by the Exhibit A Project Authorization

- 5.2 Construction Cost Budget shall be the total cost to District of all Project elements designed or specified by the Design Team.
- 5.3 Construction Manager shall work cooperatively with the Project Design Team throughout the Project, including but not limited to, the Schematic Design Phase, Design Development Phase, and Construction Documents Phase, as described in **Exhibit "A,"** so that the Project's construction cost as designed by the Design Team will not exceed the Construction Cost Budget, as may be adjusted subsequently with the District's written approval. The Construction Manager shall notify the District if it believes the construction cost as designed by the Design Team will exceed the Construction Cost Budget. The Construction Manager, however, shall not perform or be responsible for any design or architectural services.
- 5.4 Evaluations of the District's Construction Budget, and Construction Manager's preliminary and detailed cost estimates, represent the Construction Manager's best judgment as a professional familiar with the construction industry.
- 5.5 If the Bidding Phase has not commenced within ninety (90) days after DSA approval of the Construction Documents, the Construction Cost Budget may be adjusted at District's request to reflect changes in the general level of prices in the construction industry between the date of submission of the Construction Documents to the District and the date on which proposals are sought.
- 5.6 The District may, in its sole discretion, do one, or a combination, of the following if any of the events in Article 5.7 occur:
 - 5.6.1 Give Construction Manager written approval of an agreed adjustment to the Construction Cost Budget.
 - 5.6.2 Authorize Construction Manager to re-negotiate, when appropriate, and/or re-bid the Project within three (3) months' time of receipt of bids (exclusive of District and other agencies' review time).
 - 5.6.3 Terminate this Agreement or project specific Exhibit A Project Authorization form, if the Project is abandoned by the District, without further obligation by either party.
 - 5.6.4 Within three (3) months of receipt of bids, instruct Design Team to revise the drawings and specifications (in scope and quality as approved by the District) to bring the Project within the Construction Cost Budget for re-bidding. Construction Manager will perform cost estimation, value engineering, constructability reviews, and/or bidding support.

- 5.7 If any of the following events occur on a given project, the District may exercise any one, or any combination, of the actions set forth in Article 5.6 above:
- 5.7.1 The lowest responsive base bid received is five percent (5%) or more in excess of the Construction Cost Budget or
 - 5.7.2 The combined total of base bid and all additive alternates is ten percent (10%) or more of the Construction Cost Budget; or
 - 5.7.3 The Construction Cost Budget increases in phases subsequent to the Design Development Phase due to reasonably foreseeable changes in the condition of the construction market in Yolo County, in so far as these have not been caused by Acts of God, earthquakes, strikes, war, or energy shortages due to uncontrollable events in the world economy.

ARTICLE 6. Fee and Method Of Payment For Basic Services

- 6.1 District shall pay Construction Manager for all Services contracted for under this Agreement an amount equal to the following ("Fee"):
- 6.1.1 Those amounts set forth in approved Project Authorization(s).
- 6.2 The Construction Manager's Fee set forth in each Exhibit A project authorization form shall be full compensation for all of Construction Manager's Services, including, without limitation, all costs for personnel, travel within two hundred (200) miles of the Project location, offices, per diem expenses, printing, providing or shipping of deliverables in the quantities set forth in **Exhibit "A."**
- 6.3 No increase in fee will be due from change orders generated during the construction period to the extent caused by Construction Manager's error.
- 6.4 Construction Manager shall bill its work under this Agreement on an hourly basis with a not-to-exceed price per the resource sheet in accordance with **Exhibit "D."**
- 6.5 District shall pay Construction Manager the Fee pursuant to the provisions herein and the Fee Schedule set forth in **Exhibit "D."**

ARTICLE 7. Payment for Extra Services

- 7.1 For any charges for Extra Services as described in **Exhibit "B,"** Construction Manager shall submit to District a written proposal describing the proposed scope of services and listing the personnel, labor duration, rates, and cost.

- 7.2 Construction Manager will not be entitled to any compensation for Extra Services performed prior to receiving District's written authorization.
- 7.3 Any charges for Extra Services shall be paid by the District only upon certification that the claimed Extra Services were authorized in writing in advance by the District and that the Extra Services have been satisfactorily completed.

ARTICLE 8. Ownership of Data

- 8.1 All of the Construction Manager's work product, prepared or generated in connection with this Agreement, is the property of the District.
- 8.2 Upon the District's request, the Construction Manager shall make available to the District all work product completed or in progress at the time of such a request.
- 8.3 After completion of a Project or, if the District exercises the right to terminate this Agreement or an Exhibit A Project Authorization form pursuant to the terms hereof, Construction Manager shall assemble and deliver to District within five (5) calendar days of the District's written request, all of the Construction Manager's work product generated, prepared, reviewed or compiled in connection with this Agreement and the Services and authorized Extra Services hereunder. This includes, without limitation, a complete set of Project records, all documents generated by Construction Manager, copies of all documents Construction Manager exchanged with or copied to or from all other Project participants, and all closeout documents. Construction Manager shall index and organize appropriately said Project records for easy use by District personnel.
- 8.4 All Project records are property of the District, whether or not those records are in the Construction Manager's possession. District retains all rights to all copyrights, designs and other intellectual property embodied in the plans, record drawings, specifications, estimates, and other documents that Construction Manager or its Consultants prepare or cause to be prepared pursuant to this Agreement. Notwithstanding the preceding sentence, Construction Manager and its Consultants shall be entitled to reuse work product generated under this Agreement.

ARTICLE 9. Termination of Contract

- 9.1 **District's Termination of Construction Manager for Cause:** If Construction Manager fails to perform Construction Manager's duties to the District's satisfaction, or if Construction Manager fails to fulfill in a timely and professional manner Construction Manager's material obligations under this Agreement, or if Construction Manager violates any of the material terms or provisions of this Agreement, the District shall have the right to

terminate this Agreement effective immediately upon the District giving Construction Manager written notice thereof. In the event of a termination pursuant to this subdivision, Construction Manager may invoice District for all work performed until the notice of termination, but District shall have the right to withhold payment and deduct any amounts equal to the District's costs because of Construction Manager's actions, errors, or omissions.

9.1.1 **District's Request for Assurances:** If District at any time reasonably believes Construction Manager is or may be in default under this Agreement, District may in its sole discretion notify Construction Manager of this fact and request written assurances from Construction Manager of performance of Services and a written plan from Construction Manager to remedy any potential default under the terms this Agreement that the District may advise Construction Manager of in writing. Construction Manager shall, within seven (7) calendar days of District's request, deliver a written cure plan that meets the District's requirements in its request for assurances. Construction Manager's failure to provide such written assurances of performance and the required written plan, within seven (7) calendar days of request, will constitute a material breach of this Agreement sufficient to justify termination for cause.

9.2 **District's Termination of Construction Manager for Convenience:** District shall have the right in its sole discretion to terminate this Agreement for its own convenience. In the event of a termination for convenience, Construction Manager may invoice District and District shall pay all undisputed invoice(s) for work performed until the notice of termination. This shall be the only amount(s) potentially owing to Construction Manager if there is a termination for convenience.

9.3 **Construction Manager's Termination of Agreement for Cause:** Construction Manager has the right to terminate this Agreement if the District does not fulfill its material obligations under this Agreement and fails to cure such material default within thirty (30) days of receipt of written notice of said defaults, or if the default cannot be cured within thirty (30) days, commence to cure such default, diligently pursue such cure, and complete the cure within a reasonable time following written notice and demand from Construction Manager. Such termination shall be effective after receipt of written notice from Construction Manager to the District.

9.4 Except as indicated in this Article, termination shall have no effect upon any of the rights and obligations of the Parties arising out of any transaction occurring prior to the effective date of such termination.

9.5 If, at any time in the progress of the Project, the District determines that the Project should be terminated, the Construction

Manager, upon District's written notice of such termination, shall immediately cease work on the Project. The District shall pay the Construction Manager only the Fee associated with the Services provided and approved by District since the last paid invoice and up to the notice of termination.

- 9.6 **Project Suspension:** If the Project is suspended by the District for more than one hundred and eighty (180) consecutive days, the Construction Manager shall be compensated for services performed prior to notice of such suspension. When the Project is resumed, the schedule shall be adjusted and the Construction Manager's compensation shall be equitably adjusted to provide for expenses incurred in the resumption of the Construction Manager's services. Upon resumption of the Project after suspension Construction Manager shall make every effort to maintain the same Project personnel.

ARTICLE 10. Indemnity

- 10.1 To the furthest extent permitted by California law, Construction Manager shall indemnify and hold free and harmless the District, its Governing Board, agents, representatives, officers, consultants, employees, trustees, and volunteers ("the Indemnified Parties") from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury of any kind, in law or equity ("Claim") that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Construction Manager, its officers, employees, subcontractors, consultants, or agents, including without limitation, the payment of all consequential damages. Construction Manager shall also, to the furthest extent permitted by California law, defend the Indemnified Parties at Construction Manager's own expense, including attorneys' fees and costs, from any and all Claim(s) and allegations relating thereto with counsel approved by District where such approval is not to be unreasonably withheld.
- 10.2 Construction Manager shall pay and satisfy any judgment, award, or decree that may be rendered against the Indemnified Parties in any Claim. Construction Manager's obligation pursuant to Article 10.1 includes reimbursing the District for the cost of any settlement paid by the Indemnified Parties and for any and all fees and costs, including but not limited to, legal fees and costs, expert witness fees, and consultant fees, incurred by the Indemnified Parties in the defense of any Claim(s), or to enforce the indemnity herein. Construction Manager's obligation to indemnify shall not be restricted to insurance proceeds.
- 10.3 District may withhold from amounts owing to Construction Manager any and all costs that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct.

ARTICLE 11. Conduct on Project Site and Fingerprinting

- 11.1 Unacceptable and/or loud language will not be tolerated. "Cat calls" or other derogatory language toward students or public will not be allowed.
- 11.2 Drugs, alcohol, and smoking on District property are strictly prohibited. No drugs, alcohol and/or smoking are allowed at any time in any building and/or grounds on District's property. No students, staff, visitors or contractors are to use drugs on District's property.
- 11.3 Pursuant to Education Code section 45125.2, the District has determined on the basis of the scope of Services in this Agreement that Construction Manager and its subcontractors and employees will have only limited contact with pupils. Construction Manager will promptly notify the District in writing of any facts or circumstances which might reasonably lead the District to determine that contact will be more than limited as defined by Education Code section 45125.1(d).
- 11.4 Construction Manager shall comply with the provisions of Education Code section 45125.1 regarding the submission of employee fingerprints to the California Department of Justice and the completion of criminal background investigations of its employees. Construction Manager shall not permit any employee to have any contact with District pupils until such time as the Construction Manager has verified in writing to the governing board of the District that the employee has not been convicted of a felony, as defined in Education Code section 45122.1. Construction Manager's responsibility shall extend to all employees, agents, and employees or agents of its Consultants regardless of whether those individuals are paid or unpaid, concurrently employed by the District, or acting as Construction Manager's independent contractors. Construction Manager shall provide to District verification of compliance with this section and the Criminal Background Investigation Certification (**Exhibit "E"**) in writing prior to each individual commencing employment or participating on the Project and prior to permitting contact with any student.

ARTICLE 12. Responsibilities of the District

- 12.1 The District shall examine the documents submitted by the Construction Manager and shall render decisions so as to avoid unreasonable delay in the process of the Construction Manager's Services.
- 12.2 The District shall provide to the Construction Manager as complete information as is available to District regarding the District's requirements for the Project.

- 12.3 The District shall retain design professional(s) whose services, duties and responsibilities will be described in written agreement(s) between the District and design professional(s).
- 12.4 Unless the Contract Documents require that Contractor provide any of the following, the District shall, in a timely manner, and with Construction Manager's assistance, secure, submit and pay for necessary approvals, easements, assessments, permits and charges required for the construction, use, or occupancy of permanent structures or for permanent changes in existing facilities, subject to Construction Manager's and/or the Design Team's duties to recommend or provide same.
- 12.5 The District, its representatives, and consultants shall communicate with the Contractor either directly or through the Construction Manager.
- 12.6 The District shall designate an officer, employee and/or other authorized representatives to act on the District's behalf with respect to the Project. The District's representative for the Project shall be available during working hours and as often as may be required to render decisions and to furnish information in a timely manner.

ARTICLE 13. Liability of District

- 13.1 Other than as provided in this Agreement, District's obligations under this Agreement shall be limited to the payment of the compensation as provided in this Agreement. Notwithstanding any other provision of this Agreement, in no event shall District be liable, regardless of whether any claim is based on contract or tort, for any special, consequential, indirect or incidental damages, including, but not limited to, lost profits or revenue, arising out of or in connection with this Agreement for the Services performed in connection with this Agreement.
- 13.2 Construction Manager shall pay to District any and all costs incurred by District, or for which District may become liable, to the extent caused by negligent delays, acts, or omissions of Construction Manager in its performance of its Services.
- 13.3 District shall not be responsible for any damage to persons or property as a result of the use, misuse, or failure of any equipment used by Construction Manager, or by its employees, even though such equipment be furnished or loaned to Construction Manager by District.
- 13.4 Construction Manager hereby waives any and all claim(s) for recovery from the District under this Agreement, which loss or damage is covered by valid and collectible insurance policies. Construction Manager agrees to have its required insurance policies endorsed to prevent the invalidation of insurance coverages by reason of this waiver. This waiver shall extend to claims paid, or

expenses incurred, by Construction Manager's insurance company on the District's behalf.

ARTICLE 14. Insurance

14.1 Construction Manager shall procure, prior to commencing the Services, will maintain for the duration of the Agreement 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 by the Construction Manager, their agents, representatives, employees and sub-consultant(s). Construction Manager's liabilities including, but not limited to, Construction Manager's indemnity or defense obligations under this Agreement shall not be deemed limited in any way to the insurance coverage required herein. Maintenance of specified insurance coverage is a material element of this Agreement and Construction Manager's failure to maintain or renew coverage or to provide evidence of renewal during the term of this Agreement, as required or when requested, may be treated by the District, subject to its sole discretion, as a material breach of contract.

14.2 **Minimum Scope and limits of Insurance:** Coverage shall be at least as broad as the following scopes and limits:

14.2.1 **Commercial General Liability.** Two million dollars (\$2,000,000) per occurrence for bodily injury, personal injury, property damage, death, advertising injury, and medical payments arising from the performance of any portion of the Services. If Commercial General Liability or other form with a general aggregate limit is used, either the general aggregate limit shall apply separately to this Project or the general aggregate limit shall be twice the required occurrence limit.

14.2.2 **Commercial Automobile Liability, Any Auto.** One million dollars (\$1,000,000) per occurrence for bodily injury and property damage.

14.2.3 **Workers' Compensation.** Statutory limits required by the State of California.

14.2.4 **Employer's Liability.** One million dollars (\$1,000,000) per accident for bodily injury or disease.

14.2.5 **Professional Liability.** This insurance shall cover the Construction Manager and its sub-consultant(s), if any, for one million dollars (\$1,000,000) aggregate limit subject to no claim deductible, coverage to continue through completion of construction plus two years thereafter. The policy must contain terms or endorsements extending coverage that requires the insurer to defend and indemnify for acts which happen

before the effective date of the policy provided the claim is first made during the policy period.

- 14.3 The District reserves the right to modify the limits and coverages described herein, with appropriate credits or charges to be negotiated for such changes.
- 14.4 **Deductibles and Self-Insured Retention:** Any deductibles or self-insured retention exceeding Twenty-Five Thousand Dollars (\$25,000) must be declared to and approved by the District. At the option of the District, either:
 - 14.4.1 the insurer shall reduce or eliminate such deductibles or self-insured retention as respects the District, its officers, officials, employees and volunteers; or
 - 14.4.2 the Construction Manager shall procure a bond guaranteeing payment of losses and related investigations, claim administration and defense expenses.
- 14.5 **Other Insurance Provisions:** The general liability and automobile liability policies are to contain, or be endorsed to contain, the following provisions:
 - 14.5.1 All policies except for the worker's compensation, employer's liability and professional liability insurance policy shall be written on an occurrence form.
 - 14.5.2 The District, its representatives, consultants, trustees, officers, officials, employees, agents, and volunteers ("Additional Insureds") are to be covered as additional insureds as respects liability arising out of activities performed by or on behalf of the Construction Manager; Instruments of Service and completed operations of the Construction Manager; premises owned, occupied or used by the Construction Manager; or automobiles owned, leased, hired or borrowed by the Construction Manager. The coverage shall contain no special limitations on the scope of protection afforded to the Additional Insureds.
 - 14.5.3 Construction Manager shall pay all insurance premiums, including any charges for required waivers of subrogation or the endorsement of Additional Insureds. If Construction Manager fails to maintain insurance, District may take out comparable insurance, and deduct and retain amount of premium from any sums due Construction Manager under the Agreement.
 - 14.5.4 Any failure to comply with reporting or other provisions of the policies including breaches of warranties shall not affect coverage provided to the Additional Insureds.

- 14.5.5 The Construction Manager's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.
 - 14.5.6 Each insurance policy required by this clause shall be endorsed to state that coverage shall not be canceled, not renewed, or material change in coverage except after thirty (30) days prior written notice by certified mail, return receipt requested, has been given to the District.
 - 14.5.7 Construction Manager's insurance coverage shall be primary and non-contributory insurance as respects the Additional Insureds with respect to any claims related to, arising out of, or connected with the Project. Any insurance or self-insurance maintained by the Additional Insureds shall be in excess of the Construction Manager's insurance and shall not contribute with it.
- 14.6 **Acceptability of Insurers:** Insurance is to be placed with insurers admitted in California with a current A.M. Best's rating of no less than A:VII. Construction Manager shall inform the District in writing if any of its insurer(s) have an A.M. Best's rating less than A:VII. At the option of the District, the District may either:
- 14.6.1 Accept the lower rating; or
 - 14.6.2 Require Architect to procure insurance from another insurer.
- 14.7 **Verification of Coverage:** Prior to commencing with its provision of Services under this Agreement, but no later than three (3) calendar after the notice of award of contract, Construction Manager shall furnish the District with:
- 14.7.1 Certificates of insurance showing maintenance of the required insurance coverage;
 - 14.7.2 Original endorsements affecting coverage. The endorsements are to be signed by a person authorized by that insurer to bind coverage on its behalf. All endorsements are to be received and approved by the District before work commences.
- 14.8 Upon the District's request, Construction Manager will furnish District with a copy of all insurance policies related to its provision of Services under this Agreement.

ARTICLE 15. Nondiscrimination

- 15.1 Construction Manager agrees that no discrimination shall be made in the employment of persons under this Agreement because of the

fact or perception of that person's race, color, national origin, ancestry, religion, age, physical or mental disability, sex/gender, sexual orientation or perceived sexual orientation, gender identity, domestic partner status, marital status, disability or AIDS/HIV status of such person.

- 15.2 Construction Manager shall comply with any and all applicable regulations and laws governing nondiscrimination in employment.

ARTICLE 16. Covenant Against Contingent Fees

Construction Manager warrants that it has not employed or retained any company or person, other than a bona fide employee working solely for the Construction Manager, to solicit or secure this Agreement, and that it has not paid or agreed to pay any company or person, other than a bona fide employee working solely for the Construction Manager, any fee, commission, percentage, brokerage fee, gift, or any other consideration contingent on or resulting from the award or making of this Agreement. For breach or violation of this warranty, the District shall have the right to annul this Agreement without liability, or in its discretion, to deduct from the contract price or consideration or otherwise recover the full amount of such fee, commission, percentage fee, gift, or contingency.

ARTICLE 17. Entire Agreement/Modification

This Agreement, including the Exhibits hereto, supersedes all previous contracts and constitutes the entire understanding of the Parties hereto. Construction Manager shall be entitled to no benefits other than those specified herein. No changes, amendments or alterations shall be effective unless in writing and signed by both Parties. Construction Manager specifically acknowledges that in entering into this Agreement, Construction Manager relies solely upon the provisions contained in this Agreement and no others.

ARTICLE 18. Non-Assignment of Agreement

This Agreement is intended to secure the Construction Manager's specialized services. Construction Manager may not assign, transfer, delegate or sublet any interest therein without the District's prior written consent. Any assignment, transfer, delegation or sublease without the District's prior written consent shall be considered null and void.

ARTICLE 19. Law, Venue

- 19.1 This Agreement has been executed and delivered in the State of California and the validity, enforceability and interpretation of any of the clauses of this Agreement shall be determined and governed by the laws of the State of California.
- 19.2 To the fullest extent permitted by California law, the county in which the District's administration office is located shall be the venue for any action or proceeding that may be brought or arise out of, in connection with or by reason of this Agreement.

ARTICLE 20. Alternative Dispute Resolution

- 20.1 All claims, disputes or controversies arising out of, or in relation to the interpretation, application or enforcement of this Agreement may be decided through mediation as the first method of resolution. Notice of the demand for mediation of a dispute shall be filed in writing with the other party to the Agreement. The demand for mediation shall be made within a reasonable time after written notice of the dispute has been provided to the other party, but in no case longer than ninety (90) days after initial written notice.
- 20.2 If a claim, or any portion thereof, remains in dispute upon satisfaction of all applicable dispute resolution requirements, the Consultant shall comply with all claims presentation requirements as provided in Chapter 1 (commencing with section 900) and Chapter 2 (commencing with section 910) of Part 3 of Division 3.6 of Title 1 of Government Code as a condition precedent to the Consultant's right to bring a civil action against the District. For purposes of those provisions, the running of the time within which a claim must be presented to the District shall be tolled from the time the Consultant submits its written claim until the time the claim is denied, including any time utilized by any applicable meet and confer process.
- 20.3 Notwithstanding any disputes, claims or other disagreements between the Construction Manager and the District, the Construction Manager shall continue to provide and perform Services hereunder pending a subsequent resolution of such disputes.

ARTICLE 21. Tolling of Claims

Construction Manager agrees to toll all statutes of limitations for District's assertion of claims against Construction Manager that arise out of, pertain to, or relate to Contractors' or subcontractors' claims against District involving Construction Manager's work, until the Contractors' or subcontractors' claims are finally resolved.

ARTICLE 22. Attorneys' Fees

In the event either Party commences any action or legal proceeding for damages for any alleged breach of any provision of or performance under this Agreement, to terminate this Agreement, or to enforce, protect or establish any term or covenant of this Agreement or right or remedy of either Party, each party shall bear its own fees and costs.

ARTICLE 23. Severability

If any term, covenant, condition or provision of this Agreement is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remainder of the provisions hereof shall remain in full force and effect and shall in no way be affected, impaired or invalidated thereby.

ARTICLE 24. Employment Status

- 24.1 Construction Manager shall, during the entire term of Agreement, be construed to be an independent contractor and nothing in this Agreement is intended nor shall it be construed to create an employer-employee relationship, a joint venture relationship, or to allow District to exercise discretion or control over the professional manner in which the Construction Manager performs the Services which are the subject matter of this Agreement; provided always, however, that the Services to be provided by Construction Manager shall be provided in a manner consistent with all applicable standards and regulations governing such Services.
- 24.2 Construction Manager understands and agrees that Construction Manager's personnel are not and will not be eligible for: membership in, or to receive any benefits from, any District group plan for hospital, surgical or medical insurance; membership in any District retirement program; paid vacation, paid sick leave or other leave, with or without pay; or any other benefits which accrue to a District employee.
- 24.3 Should District, in its discretion, or a relevant taxing authority such as the Internal Revenue Service or the State Employment Development Department, or both, determine that Construction Manager or any employee of Construction Manager is an employee of District for purposes of collection of any employment taxes, the amounts payable under this Agreement shall be reduced by amounts equal to both the employee and employer portions of the tax due (and offsetting any credits for amounts already paid by Construction Manager which can be applied against this liability). District shall then forward those amounts to the relevant taxing authority.
- 24.4 Should a relevant taxing authority determine a liability for past services performed by Construction Manager for District, upon notification of such fact by District, Construction Manager shall promptly remit the amount due or arrange with District to have the amount due withheld from future payments to Construction Manager under this Agreement (again, offsetting any amounts already paid by Construction Manager which can be applied as a credit against that liability).
- 24.5 A determination of employment status pursuant to the preceding two paragraphs shall be solely for the purposes of the particular tax in question, and for all other purposes of this Agreement, Construction Manager shall not be considered an employee of District. Notwithstanding the foregoing, should any court, arbitrator, or administrative authority determine that Construction Manager is an employee for any other purpose, then Construction Manager agrees to a reduction in District's liability resulting from this Agreement pursuant to principles similar to those stated in the foregoing paragraphs so that the total expenses of District under this Agreement shall not be greater than they would have been had

the court, arbitrator, or administrative authority determined that Construction Manager was not an employee.

- 24.6 Nothing in this Agreement shall operate to confer rights or benefits on persons or entities not a party to this Agreement.

ARTICLE 25. Warranty of Construction Manager

- 25.1 Construction Manager warrants that the Construction Manager is properly licensed and/or certified under the laws and regulations of the State of California to provide all the services that it has herein agreed to perform. Construction Manager further warrants that all of the work performed under this Agreement by the Construction Manager shall comply with all applicable laws, rules, regulations and codes of the United States and the State of California. The Construction Manager also warrants that it shall comply with all applicable ordinances, regulations, and resolutions of Yolo County.
- 25.2 Construction Manager certifies that it is aware of the provisions of the California Labor Code requiring every employer to be insured against liability for workers compensation or to undertake self-insurance in accordance with the provisions of that code, and it certifies that, if applicable, it will comply with those provisions before commencing the performance of the work of this Agreement.

ARTICLE 26. Cost Disclosure - Documents and Written Reports

Construction Manager shall be responsible for compliance with California Government Code section 7550, if the total cost of the Agreement is over five thousand dollars (\$5,000).

ARTICLE 27. Communications / Notice

Notices and communications between the Parties to this Agreement may be sent to the following addresses by registered or certified mail with postage prepaid, return receipt requested, by overnight delivery service, or by personal delivery:

District:

Davis Joint Unified School District
526 B Street
Davis, CA 95616
ATTN: David Burke
Executive Director of Capital Operations

Construction Manager:

Innovative Construction Services, Inc.
5433 El Camino Ave, Suite 2
Carmichael, CA 95608
ATTN: Dave Fukui, Construction Manager

If notice is given by registered or certified mail with postage prepaid, return receipt requested, it shall be considered delivered on the day the notice is signed for. If notice is given by overnight delivery service, it shall be considered delivered on the date stated in the proof of delivery.

The Construction Manager and the District, by notice given hereunder, may designate different addresses to which subsequent notices, certificates or other communications will be sent.

ARTICLE 28. [RESERVED]

ARTICLE 29. District's Right to Audit

- 29.1 District retains the right to review and audit, and the reasonable right of access to Construction Manager's and any Consultant's premises to review and audit the Construction Manager's compliance with the provisions of this Agreement ("District's Right"). The District's Right includes the right to inspect, photocopy, and to retain copies, outside of Construction Manager's premises, of any and all Project-related records and other information with appropriate safeguards, if such retention is deemed necessary by the District in its sole discretion. The District shall keep this information confidential, as allowed by applicable law.
- 29.2 The District's Right includes the right to examine any and all books, records, documents and any other evidence of procedures and practices that the District determines is necessary to discover and verify whether Architect is in compliance with all requirements of this Agreement.
- 29.3 If there is a claim for additional compensation or for Extra Services, the District's Right includes the right to examine books, records, documents, and any and all other evidence and accounting procedures and practices that the District determines is necessary to discover and verify all direct and indirect costs, of whatever nature, which are claimed to have been incurred, or anticipated to be incurred.
- 29.4 Construction Manager shall maintain complete and accurate records in accordance with generally accepted accounting practices in the industry. Construction Manager shall make available to the District for review and audit all Project-related accounting records and documents and any other financial data. Upon District's request, Construction Manager shall submit exact duplicates of originals of all requested records to the District.
- 29.5 Construction Manager shall include audit provisions in any and all of its subcontracts, and shall ensure that these sections are binding upon all Consultants.
- 29.6 Construction Manager shall comply with these provisions within fifteen (15) days of the District's written request to review and audit any or all of Construction Manager's Project-related records and information.

ARTICLE 30. Other Provisions

- 30.1 Construction Manager shall be responsible for the cost of construction change orders caused directly by Construction Manager's willful misconduct or negligent acts,'. Without limiting Construction Manager's liability for indirect or consequential cost impacts, the direct costs for which Construction Manager shall be liable shall equal its proportionate share of the difference between

the cost of the change order and the reasonable cost of the work had such work been a part of the originally prepared Construction Documents. These amounts shall be paid by Construction Manager to District or the District may withhold those costs from amounts due or to become due to Construction Manager.

- 30.2 Neither the District's review, approval of, nor payment for, any of the Services required under this Agreement shall be construed to operate as a waiver of any rights under this Agreement, and Construction Manager shall remain liable to the District in accordance with this Agreement for all damages to the District caused by Construction Manager's failure to perform any of the Services furnished under this Agreement to the standard of care of the Construction Manager for its Services, which shall be, at a minimum, the standard of care of construction managers performing similar work for California public school districts at or around the same time and in or around the same geographic area of the District.
- 30.3 Each party warrants that it has had the opportunity to consult counsel and understands the terms of this Agreement and the consequences of executing it. In addition, each party acknowledges that the drafting of this Agreement was the product of negotiation, that no party is the author of this Agreement, and that this Agreement shall not be construed against any party as the drafter of the Agreement.
- 30.4 The individual executing this Agreement on behalf of Construction Manager warrants and represents that she/he is authorized to execute this Agreement and bind the Construction Manager to all terms hereof.
- 30.5 This Agreement may be executed in one or more counterparts, each of which shall be deemed an original. A facsimile or electronic signature shall be deemed to be the equivalent of the actual original signature. All counterparts so executed shall constitute one Agreement binding all the Parties hereto.

ARTICLE 31. Exhibits.

Exhibits "A" through "E" attached hereto are hereby incorporated by this reference and made a part of this Agreement.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement on the date(s) indicated below.

**DAVIS JOINT UNIFIED SCHOOL
DISTRICT**

Date: September 3, 2020

By: _____

Name/Title: Matt Best, Deputy
Superintendent

**INNOVATIVE CONSTRUCTION
SERVICES, INC.**

Date: August 26, 2020

By:  _____

Name/Title: Meredith Collins
CFO/Program Manager

EXHIBIT "A"

RESPONSIBILITIES AND SERVICES OF CONSTRUCTION MANAGER

1.	BASIC SERVICES	A-1
2.	GENERAL PROJECT SERVICES	A-5
3.	PRECONSTRUCTION PHASE	A-5
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EXHIBIT "A"

RESPONSIBILITIES AND SERVICES OF CONSTRUCTION MANAGER

Construction Manager shall provide professional services necessary for completing the following:

1. BASIC SERVICES

- 1.1. Provide work which shall comply with professional standards and applicable requirements of federal, state, and local law.
- 1.2. Monitor and advise the District as to all material developments in the Project. Maintain reporting systems for scope, sequencing, scheduling, budgets and communication for the Project using existing District software.
- 1.3. Be the focal point of all communication to and from construction Contractor(s).
- 1.4. Implement methods to track all expenditures on the Project. Construction Manager shall generate monthly reports to the District reflecting this information.
- 1.5. Prepare methods to track and report on schedule status for the Project. Construction Manager shall develop master schedules and milestone schedules for the Project, and shall report on same each month to the District.
- 1.6. The Construction Manager may be requested to assist with preparation of items requiring Board approval and routine reporting.
- 1.7. Construction Manager shall work cooperatively with the Design Team and the District to:
 - 1.7.1. Define and schedule the Project.
 - 1.7.2. Provide Services that will result in the development of an overall Project strategy with regard to phases, construction schedules, timing, budget, prequalification, contractor procurement, construction materials, building systems, and equipment.

- 1.8. Perform constructability reviews, determine construction feasibility, availability of materials and labor, time requirements for installation and construction, and factors related to cost, including costs of alternative designs, of materials, preliminary budgets, and possible economies.
- 1.9. Interface with the Contractor and all subcontractors all general and/or trade Contractors during construction to ensure that the District is provided with an acceptable Project and the best value for taxpayer dollars.
- 1.10. Advise the District as to the regulatory agencies that have jurisdiction over any portion or all of the Project, and as to coordination with and implementation of the requirements of the regulatory agencies, including without limitation DSA.
- 1.11. Contract for or employ, at Construction Manager's expense, sub-consultant(s) to the extent deemed necessary for Construction Manager's services. Nothing in the foregoing shall create any contractual relationship between the District and any sub-consultant(s) employed by the Construction Manager under terms of this Agreement.
- 1.12. Cooperate with the District, Board, and other professionals employed by the District for the design, coordination or management of other work related to the Project, including District staff and consultants, Program Manager, project manager(s), citizens' oversight committee, other District committees, and the community to facilitate the timely completion of the Project within Board-approved budgets and to District design standards.
- 1.13. Chair, conduct and take minutes of periodic meetings between District and its design professional(s), the Site Committee meetings, and construction meetings during the course of the Project. Construction Manager shall invite the District and/or its representative and the Project Inspector to participate in these meetings. Construction Manager shall keep meeting minutes to document comments generated in these meetings.
- 1.14. Develop for District approval a Project time schedule at the start of Project development that does the following:

- 1.14.1. Provides sufficient time for prequalification, and if necessary the resolution of any appeals, bidding, and, if necessary, rebidding, or negotiating if applicable, the Project;
 - 1.14.2. Coordinates and integrates the design professional(s)' design efforts with bidding schedules;
 - 1.14.3. Includes realistic activity sequences and durations, allocation of labor and materials and delivery of products requiring long lead-time procurement; and
 - 1.14.4. Takes into account the District's occupancy requirements (showing portions of the Project having occupancy priority and ongoing operational occupancy requirements).
- 1.15. Be responsible for the professional quality and technical accuracy of all cost estimates, constructability reviews, studies, reports, projections, opinions of the probable cost of construction, and other services furnished by Construction Manager under this Agreement as well as coordination with all Master Plans, studies, reports and other information provided by District to Construction Manager. Construction Manager shall, without additional compensation, correct or revise any errors or omissions in materials it generates.
 - 1.16. Maintain a log of all meetings, site visits or discussions held in conjunction with the work of the Project, with documentation of major discussion points, observations, decisions, questions or comments. These shall be furnished to the District and/or its representative for inclusion in the overall Project documentation.
 - 1.17. Coordinate transmittal of documents to regulatory agencies for review and advise the District of potential problems in completion of such reviews.
 - 1.18. Assist with preparation of a bidders list for each bid package for approval by the District.

- 1.19. Assist the District in pre-qualifying bidders if prequalification is permitted or required by the District. This service shall include the following:
 - 1.19.1. Preparation and distribution of prequalification questionnaires;
 - 1.19.2. Receiving and analyzing completed questionnaires;
 - 1.19.3. Interviewing possible bidders, references, bonding agents and financial institutions;
 - 1.19.4. Preparing recommendations for the District; and
 - 1.19.5. Assisting with resolution of any appeals.
- 1.20. Conduct a telephonic and correspondence campaign to attempt to increase interest among qualified bidders.
- 1.21. Assist the District in preparing and placing notices and advertisements to solicit bids for the Project, if requested.
- 1.22. To the extent requested by the District, coordinate the delivery of Bid Documents to the bidders. The District shall obtain the District-approved contract documents from the design professional(s) and the Construction Manager shall arrange for printing, binding, wrapping, and delivery to the bidders. The Construction Manager shall maintain a list of bidders receiving contract documents.
- 1.23. To the extent requested by the District, for Lease Leaseback projects, coordinate Request for Qualifications/Proposal ("RFP") process and assist in negotiation of agreements, including Preliminary Services Agreement, Site Lease, and Facilities Lease with guaranteed maximum price.
- 1.24. Provide documentation, pictures, and other information and assistance to the District for the District's use on a website, and as otherwise necessary, for public access to show Project status.
- 1.25. Ensure that Contractor, all subcontractor(s), Consultants, and sub-consultant(s) comply with any District-approved storm

water management program that is applicable to the Project, at no additional cost to the District.

- 1.26. Provide direction and planning to ensure Project adherence to applicable environmental requirements such as those emanating from the Environmental Protection Agency ("EPA"), Cal/EPA, the California Environmental Quality Act ("CEQA"), Air Quality Management District and State of California and Regional Water Quality Control Board laws, regulations and rules. The Construction Manager shall comply with, and ensure that all Consultants, the Contractors and subcontractors, and all design professionals and their sub-consultants comply with, any storm water pollution prevention plans, other storm water management program and other environmental impact mitigation requirements that are approved by the District and applicable to the Project, at no additional cost to the District.
- 1.27. Maintain accurate Project cost accounting records, using GAAP, on authorized work performed under unit costs, actual costs for labor and material, or other basis for maintaining required accounting records. Construction Manager shall provide accounting records to the District on a monthly basis, or as reasonably requested by District. Construction Manager shall afford the District access to these records and preserve these records for a period of three (3) years after final payment, at no cost to the District.
- 1.28. To the extent requested by the District, assist Architect with the preparation of an estimate of costs for all addenda and coordinate with Architect to submit the estimate to the District for approval. Assist and coordinate with Architect as required to adjust the Construction Cost Budget and other Project costs as indicated in this Agreement and as required in the Agreement for Architectural Services.
- 1.29. Provide and maintain a management presence on the Project site(s).
- 1.30. Construction Manager is **NOT** responsible for:
 - 1.30.1. Ground contamination or hazardous material analysis.

- 1.30.2. Any asbestos testing, design or abatement; however, it shall coordinate and integrate its work with any such information provided by District.
- 1.30.3. Compliance with the California Environmental Quality Act ("CEQA"), except that Construction Manager agrees to coordinate its work with that of any CEQA consultants retained by the District, and the work of Contractor and the Design Team to provide current information for use in CEQA compliance documents and to identify and carry out mitigation measures.
- 1.30.4. Historical significance report.
- 1.30.5. Soils investigation.
- 1.30.6. Geotechnical hazard report.
- 1.30.7. Topographic survey, including utility locating services.
- 1.30.8. Inspections required on-site that fall under any approving agency (e.g., DSA, County, Utilities, etc.)

2. GENERAL PROJECT SERVICES

- 2.1. **General:** Monitor and advise the District as to all material developments on the Project. Construction Manager shall implement with District approval reporting methods for schedules, cost and budget status. The Construction Manager shall be the focal point of all communication to and from construction Contractor and shall be copied on all communications between the District and its design professional(s).
- 2.2. **Scheduling:** Track and report on schedule status for Project using methods. The Construction Manager shall develop Project master schedules and milestone schedules, and review and approve Contractor project schedules and milestone schedules for the project per specifications, and shall report on same each month to the District.
- 2.3. **Cost Controls:** Implement methods to track construction expenditures on the Project using methods. The Construction

Manager shall generate monthly reports to the District reflecting this information.

- 2.4. **Communications to Board:** The Construction Manager may be required to attend Board meetings, and to provide updates at each meeting.

3. PRECONSTRUCTION PHASE

- 3.1. To the extent requested by the District, provide overall coordination of the Project; serve as the focal point of communication, transmitting information to the District and Design Team on general aspects of the Project, including planning, scheduling, cost management, progress reporting, design review, dispute resolution, and documentation. Communications from the construction Contractor to the District and Design Team shall be through the Construction Manager. The Construction Manager shall receive simultaneous copies of all written communications from the District or the Design Team to the construction Contractor.
- 3.2. To the extent requested by the District, assist with the detailed definition of project scope, budget, and schedule, as needed. Review and reconcile cost estimates from the assigned architect and coordinate peer review estimates when requested by the District. Assist in organizing and, if relevant, segregating bid packages for maximum cost effectiveness for the District. Advise the District regarding owner-supplied equipment and other potential cost-saving measures.
- 3.3. To the extent requested by the District, assist the District in the solicitation and retention of design and engineering consultants, and coordinate design consultants' activities and delivery schedules, as needed. Provide value engineering and life cycle cost analysis.
- 3.4. Provide design-phase services in conjunction with the architecture firms awarded the Project by the District. Work with the Architect to conform and refine designs to correlate designs to budget and Facilities Master Plan, if applicable. Review design documents for constructability, scheduling, consistency, and coordination during schematic and design development phases of work. Perform constructability reviews

at appropriate stages of design. Assist with verification of site conditions. Expedite design reviews, including modifications. Keep accurate documentation of all discussions with users regarding scope and resolution.

- 3.5. Prepare and maintain a Construction Management schedule for the Project. Prepare a procurement plan, where required.
- 3.6. To the extent requested by the District, monitor and report to the District on status of design and state approval in relation to the schedule for the Project. Attend meetings to coordinate design efforts for the Program. Assist in identifying and obtaining all necessary approvals.
- 3.7. To the extent requested by the District, solicit proposals, evaluate, and recommend other professional consultants needed to complete the Project.
- 3.8. Implement District-approved implementation procedures, forms and reporting requirements for the Project that involve all members of the Project team, including the District, design professional(s), and construction Contractor(s).
- 3.9. Work with the Design Team and District to develop the final sizes, choice of materials, services and utilities and other detailed design and performance criteria of the Project.
- 3.10. To the extent requested by the District, provide value engineering at the Schematic Design and/or 100% Design Development Phase. This evaluation will consist of a review of the proposed materials, equipment, systems and other items depicted in the design documents and shall be coordinated with the District's design guidelines and design professional(s). The Construction Manager will prepare a value engineering report documenting the results of the evaluation and make recommendations to the District with respect to alternatives, deletions, or amendments of such proposed items that pertain to the anticipated construction costs, useful life, maintenance and operational costs and efficiencies. The Construction Manager shall provide to the District value engineering recommendations and cost/benefit analysis of those recommendations.

- 3.11. Perform or subcontract for constructability reviews of the Project at the Design Development Phase and at 90% of the Construction Documents Phase. The Project Manager shall review the design documents for clarity, consistency, constructability and coordination. The results of the review shall be provided in writing and as notations on the documents to the District. The Construction Manager shall also make recommendations to the District with respect to constructability, construction cost, sequence of construction, and construction duration
- 3.12. Develop master bid/award schedule(s) including construction milestones for the Project through the completion of construction, as directed by the District, in coordination with design professional(s) and advise and consult with the District. Construction Manager shall review and approve construction Contractor's schedules, but shall not dictate any construction Contractor's means and/or methods of performance.
- 3.13. Establish schedules for any Consultant, and for any hazardous materials or other testing, and review costs, estimates, and invoices of each.
- 3.14. Implement a management control system to support such functions as planning, organizing, scheduling, budgeting, reporting progress, and identifying and documenting problems and solutions for the Project. Prepare monthly progress reports for the District and Program Manager regarding the schedule for the Project.
- 3.15. To the extent requested by the District, organize an initial planning workshop to create baseline parameters for the Project, to define overall building requirements, Project strategy, conceptual budget and schedule. Pursuant to understandings reached at these meetings, Construction Manager will assist Program Manager with developing an implementation plan that identifies the various phases of the Project, coordination among phases, and budget and time constraints for each phase of the Project. The plan will include a detailed strategy, master budget and master schedule as well as identification of critical events and milestone activities.

- 3.16. To the extent requested by the District, provide updated cost estimates for the Project at the Schematic Design, Design Development, and Construction Documents Phases as directed by District or Program Manager; coordinate with design professional(s) and Program Manager and reconcile cost estimates with design professional(s)' estimates.
- 3.17. To the extent requested by the District, advise District regarding "green building" technology and lifecycle costing, when applicable.
- 3.18. Fully coordinate all changes requested by any utility company needed to complete the Project.
- 3.19. To the extent requested by the District, assist in reviewing and tailoring the District's front end documents for the Project. Recommend the number of days required for the construction phase (and any sub-phases, such as hazardous material abatement) and recommend the amount of the liquidated damages.

4. PRE-BID PHASE

- 4.1. Develop master schedules for the Project. Develop budget(s) for the Project based on construction cost estimates.
- 4.2. In consultation with the District and according to District-approved policies, procedures, and standards, implement procedures, forms, and reporting requirements for the Project. Establish, accordingly, a communications procedure for the Project that allows for decision making at appropriate levels of responsibility and accountability.
- 4.3. Work with the design professional(s) to modify or add to standard, special, or general conditions for contract documents that might be needed for unique Project or contract conditions, for the District's approval, and/or assist in the development of documents necessary for the bidding phase.
- 4.4. To the extent requested by the District, make recommendations for development and implementation of procedures to comply with applicable bidding or RFP requirements for the Project as applicable and for expediting

completion of the bidding process for the Project. The scope of the foregoing includes without limitation, recommendations of Construction Manager with respect to: (a) pre-qualification of potential contractors; and (b) alternative construction delivery approaches for the Project, including consideration of a single general contractor and/or Lease Leaseback approach to construction for the Project.

5. BIDDING PHASE

- 5.1. To the extent requested by the District, assist with pre-qualification process for the selection of prime and/or sub-contractors based on the detailed definition of Project scope, budget, schedule, and programming support. Develop a list of pre-qualified prime and sub-contractors, as required.
- 5.2. Assist with developing bidders' interest in the Project. Coordinate all bid phase activities with District departments. Assist with conducting pre-bid conferences to familiarize bidders with the bidding documents, and any special systems, materials or methods and with Project procedures. Conduct job walks and bidders' conferences, maintain and prepare minutes of job walks or bidder's conferences. Field questions from bidders, referring questions to design professional(s) and District as required. Coordinate with design professional(s) to respond to bidder questions by addenda.
- 5.3. Assist with preparation of public solicitation notices for District approval. Review, coordinate, and estimate cost of bid phase addenda.
- 5.4. Assist with review of bid proposals for responsiveness to bid requirements, evaluate bidder responsibility, and conduct reference checks. Prepare bid analyses and advise the District on compliance of bidders with District requirements and bid requirements. Report and recommend to the District after review and evaluation. Make recommendations to the District for prequalification of bidders and award of contracts or rejection of bids.
- 5.5. Assist with conducting post-bid conferences as required. Assist and advise regarding bid protests.

- 5.6. If appropriate, coordinate contracting with Contractor awarded the contract, including evaluating bonds and insurance, and negotiate final terms of construction contractor's contract(s), if applicable.
- 5.7. Assist with conducting pre-award conferences with successful bidders.
- 5.8. Assist with scheduling and conducting preconstruction meetings. Maintain, prepare, and distribute minutes.
- 5.9. Assist with the preparation of agenda items for Board approval. Coordinate submittals required by governing agencies.

6. CONSTRUCTION PHASE

- 6.1. Administer the construction Contract.
- 6.2. Review Contractor's submitted schedules, as needed. Administer and coordinate the work of Contractor on a daily basis. Enforce performance, scheduling, and notice requirements. Review Contractor's schedule submittals and make recommendations to the District.
- 6.3. Monitor schedule and cost information for Contractor. Document the progress and costs of the Project. Report and advise proactively on potential schedule and budget variances and impacts. Recommend potential solutions to schedule and cost problems. Work cooperatively with the District, Architect, and Contractor to ensure that Project is delivered on time and within budget. Review construction progress and prepare reports.
- 6.4. Verify permits, approvals, bonds, insurances, and schedules of values. Coordinate with DSA Project inspector, and ensure compliance with all DSA reporting and closeout requirements. Submit necessary reports to state and local authorities.
- 6.5. Monitor the construction Contractor to verify that tools, equipment, and labor are furnished and work performed and completed within the time required or indicated by the plans and specifications, under the direction and to the satisfaction of the District. The Construction Manager expressly agrees to

verify that the specifications are met, observed, performed, and followed in accordance with the professional standards of care for construction management.

- 6.6. Coordinate work of the construction Contractor and effectively manage the Project to achieve the District's objectives in relation to cost, time and quality.
- 6.7. Provide continuous on-site construction management personnel, as needed. Conduct construction meetings for the Project to discuss and resolve such matters as progress, quality and scheduling. Said meetings shall be weekly unless Project conditions do not require that frequency. Prepare and promptly distribute minutes. When required by field or other conditions, construction progress, or the quality of workmanship, conduct special construction meetings; record, prepare, and distribute minutes of these meetings to the District, the affected construction Contractor, and design professional(s).
- 6.8. Establish and implement team communication procedures.
- 6.9. Ensure that construction Contractor provides construction schedules as required by the construction Contracts, including activity sequences and durations, submittal schedule, or procurement schedule for products that require long lead time. The Construction Manager shall review construction Contractor's construction schedules for conformity with the requirements of the construction Contract and conformity with the overall schedule for the Project. Where construction Contractor's construction schedules do not so conform, the Construction Manager will take appropriate measures to secure compliance, subject to District approval.
- 6.10. Ensure construction Contractor's compliance with the requirements of the respective construction Contract for updating, revising, and other obligations relative to their respective construction schedules.
- 6.11. Cost Control. Construction Manager shall develop and monitor an effective system of construction cost control for the Project. Construction Manager shall identify variances between actual and budgeted or estimated costs and advise District and design

professional(s) whenever a Project cost exceeds budgets or estimates. Construction Manager shall manage the construction bids and contracts in accordance with the Construction Budget.

- 6.12. Continually monitor whether construction contract requirements are being fulfilled and recommend courses of action to the District when Contractor fails to fulfill contractual requirements.
- 6.13. The Construction Manager may authorize minor variations in the work from the requirements of the contract documents that do not involve an adjustment in the contract price or the contract time or design and which are consistent with the overall intent of the contract documents. The Construction Manager shall provide to the design professional(s) and the District copies of these authorizations.
- 6.14. Evaluate and process payment applications and verify progress.
- 6.15. Verify that safety programs are developed and submitted by the construction Contractor as required by the Contract. Neither Construction Manager, Program Manager, nor District shall be responsible for or have any liability for Contractor's failure to provide, comply with, or enforce said safety programs.
- 6.16. Implement quality control program, including As-Built Drawings accuracy. Coordinate and evaluate Contractor's recovery schedules.
- 6.17. Record the progress of the Project by a log.
- 6.18. Monitor ongoing Project costs to verify that projected costs do not exceed approved budget and provide the District timely notice of any potential increase in costs in excess of approved budgets provided to Construction Manager.
- 6.19. Negotiate Contractor's proposals and review change orders prepared by design professional(s), with design professional(s)' input as needed, for approval by the District.

- 6.20. Evaluate and process change order requests. Make recommendations to the District. Determine cost and schedule effects of change orders. Prepare change order reports and maintain a change order log for the Project and implement procedures to expedite processing of change orders.
- 6.21. Assist the District in coordinating the services of special consultants and testing laboratories on the Project.
- 6.22. In conjunction with the design professional(s), monitor work of the construction Contractor to determine that the work is being performed in accordance with the requirements of the respective construction documents for the Project, including but not limited to the plans, specifications, addenda, and all other contract documents, as well as all applicable laws, regulations and directives of agencies with jurisdiction over any of the Project. As appropriate, with assistance of design professional(s), make recommendations to the District and Program Manager regarding special inspection or testing of work that is not in accordance with the provisions of the contract documents.
- 6.23. To guard District against defects in the work of the construction Contractor, the Construction Manager shall implement a quality control program to monitor the quality and workmanship of construction for conformity with:
 - 6.23.1. Accepted industry standards;
 - 6.23.2. Applicable laws, rules, or ordinances; and
 - 6.23.3. The design documents and contract documents.
- 6.24. Where the work of a construction Contractor does not conform as set forth above, the Construction Manager shall, with the input of design professional(s) and Inspector of Record:
 - 6.24.1. Notify the District of any non-conforming work observed by the Construction Manager;
 - 6.24.2. Reject the non-conforming work; and

- 6.24.3. Take any and all action(s) necessary to compel the construction Contractor to correct the work.
- 6.25. Evaluate, track, and maintain logs of requests for information ("RFI") from construction Contractor and responses, shop drawings, samples, and other submittals, based, in part, on information obtained from the design professional(s). Advise District and Program Manager as to status and criticality of RFIs.
- 6.26. Implement procedures, in collaboration with the District and design professional(s), for expediting the processing and approval of shop drawings, product data, samples, and other submittals for each contract. Receive and transmit all submittals from the construction Contractor to the design professional(s) for review and approval. Maintain submittal and shop drawing logs.
- 6.27. Record the progress of work at the Project. When present, prepare daily reports for the Project containing a record of weather, construction Contractor(s) present and their number of workers, work accomplished, problems encountered, and other relevant data.
- 6.28. Prepare and distribute monthly project status reports for the Project including updates on project activities, progress of work, outstanding issues, potential problems, schedule, and status of RFIs, change orders, and submittals.
- 6.29. Coordinate, assist, and support Architect during construction administration phase as required.
- 6.30. This is responsibility of Contractor to maintain this documentation on as-builts. At the completion of the Project, deliver all such records to District. Construction Contractor and design professional(s) share responsibility to prepare Record Drawings and As-Built Drawings.
- 6.31. Coordinate the move into the Project.
- 6.32. Work with District team to develop lists of incomplete or unsatisfactory work ("punch lists").

- 6.33. Fully document and prepare deductive change orders for extra services of consultants that are the responsibility of a Contractor or another consultant. Present such a change order for signature by the Contractor or consultant.
- 6.34. Determine final completion and payment. Determine completion dates, final payments, and release of retention. Coordinate procurement and installation of Furniture, Fixtures, and Equipment ("FF&E").

7. PROJECT COMPLETION

- 7.1. The Construction Manager shall coordinate with District staff, the construction Contractor's check-outs of utilities, operational systems and equipment, and start-up and testing. The Construction Manager shall coordinate the records of start-up and testing as provided by the construction Contractor and shall ensure the District of compliance with applicable provisions of the Contract, that all work has been performed and accepted, and that all systems are complete and operative.
- 7.2. At the punch list phase of the Project or designated portions thereof, the Construction Manager, in consultation with the Architect, shall ensure the preparation of a list of incomplete or unsatisfactory work or work which does not conform to the requirements of the contract documents ("punch list work") and a schedule for the completion of the punch list work. The Construction Manager shall provide this list to the construction Contractor. The Construction Manager shall coordinate construction Contractor's performance and completion of punch list work. The Construction Manager shall review, with the Architect and District, the completed punch list work. The Construction Manager shall ensure, with input of the Architect, that the completed punch list work complies with applicable provisions of the construction Contract.
- 7.3. The Construction Manager shall determine, with the Architect and District, when the Project or designated portions thereof are complete.
- 7.4. The Construction Manager shall conduct, with the Architect and District, final inspections of the Project or designated portions

thereof. The Construction Manager shall notify the District of final completion.

- 7.5. The Construction Manager shall consult with the Architect and District and shall determine when the Project and the construction Contractor's work are finally completed. The Construction Manager shall assist with the issuance of a Certificate of Final Completion, and shall provide to the District a written recommendation regarding payment to the Contractor.
- 7.6. The Construction Manager shall coordinate close-out procedures, including personnel training. Advise District staff on systems operations, training and close-out of Projects.
- 7.7. The Construction Manager shall coordinate and expedite Contractor close-out requirements, including guarantees/warranties, certificates, keys, manuals, As-Built Drawings, Record Drawings, specifications, daily logs, and verified reports. Ensure that all other project participants submit necessary close-out documentation.
- 7.8. The Construction Manager shall coordinate operational safety reviews with District post occupancy and manage corrective work as necessary.
- 7.9. The Construction Manager shall ensure that all building commissioning requirements have been fulfilled in a timely manner through District commissioning agents.
- 7.10. The Construction Manager shall obtain occupancy permits (where required), coordinate final testing, documentation, and regulatory inspections. Prepare occupancy plan report.
- 7.11. The Construction Manager shall prepare final accounting reports.

8. FINAL DOCUMENTS

The Construction Manager, in conjunction with the Design Team, shall review and monitor all As-Built Drawings, maintenance and operations manuals, and other closeout documents to be sure that all required documents meeting contract requirements are provided, and

shall secure and transmit to the District and Program Manager those documents and all required guarantees, keys, manuals, record drawings, and daily logs. The Construction Manager shall also forward all documents and plans to the District upon completion of the project and ensure all such plans and documents are well organized for any appropriate audit or review of the Project.

9. WARRANTY

The Construction Manager shall assist Program Manager as necessary to implement a Warranty Inspection and Warranty Work procedure for the Project that Contractor must follow. The procedure shall include a twelve (12) month call back period and a final warranty inspection eleven (11) months after Project completion to inspect the Project and identify any outstanding warranty work.

10. PROJECT CLOSEOUT

To the extent requested by District, the Construction Manager shall assist District, Architect, and Inspector of Record, as necessary, to ensure all information and documentation necessary for Project closeout with the DSA is complete and the Project is timely closed out with DSA. This includes but is not limited to reports from independent consultants, inspectors, testing laboratories, and corresponding or required DSA forms.

[END OF EXHIBIT]

PROJECT AUTHORIZATION NO. 2
TO AGREEMENT FOR CONSTRUCTION MANAGEMENT SERVICES

This Project Authorization No. 2 ("Project Authorization") is an addendum supplemental to the Agreement for Construction Management Services by and between the Davis Joint Unified High School District and Innovative Construction Services, Inc. ("Agreement"), and is entered into by and between the Davis Joint Unified High School District ("District") and Innovative Construction Services, Inc. ("Construction Manager," and together with the District, "Parties"), as follows:

RECITALS

WHEREAS, the Parties entered into the Agreement effective as of September 3, 2020 for the provision of construction management services in connection with the District's Measure M capital facilities improvements ("Program");

WHEREAS, the Agreement provides that the Parties may execute this Project Authorization to authorize Construction Manager's work on certain Project(s) under the Program, as identified herein; and

WHEREAS, the Parties wish to supplement the Agreement to assign Construction Manager the Project(s) and accompanying terms, including but not limited to scope and payment, contained herein.

NOW THEREFORE, in consideration of the mutual promises and covenants set forth above and contained herein, the Parties hereby agree as follows:

AGREEMENT

1. **Effect:** This Project Authorization is entered into pursuant to the Agreement, and, when fully executed, is considered as an integral part of said Agreement subject to all the provisions and conditions thereof.
2. **Project:** The District does hereby authorize Construction Manager to provide professional services on the following project:

Preschool at Korematsu Elementary School
located at: 3100 Loyola Drive, Davis, CA 95618

The scope of work will include the provision of professional construction management services in connection with the Project.

3. **Services:** Services include those set forth in **Schedule A**, which is attached hereto and incorporated herein by this reference.

EXHIBITS

Agreement for Construction Management Services - Korematsu Preschool
Davis Joint Unified High School District
DWK DMS 3521792v1

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4. **Construction Cost Budget and Construction Budget:**

4.1. The Construction Cost Budget, as defined in the Agreement, for the Project is Five Million, Eight Hundred Fifty Thousand, One Hundred Ninety Nine Dollars (\$5,850,199).

5. **Fee:** The District shall pay Construction Manager for all Services pursuant to this Project Authorization an amount equal to the following ("Fee") an amount not exceed One Hundred Twenty Seven Thousand, Four Hundred Eighty Dollars (\$127,480 Dollars) based on the hourly rates and reimbursable expenses set forth in **Exhibit "C"** to the Agreement. The District shall pay Construction Manager the Fee consistent with the provisions of **Exhibit "C."**

6. **Extra Services:** To be performed and billed in accordance with Exhibit "B" to the Agreement.

7. **Staffing:** Services shall be provided by the key personnel identified in the Agreement, unless otherwise identified below:

Project Executive: Eric Hartwell

Project Director: Dave Fukui

Senior Project Manager: Meredith Collins

Project Manager: Rick Hureaux and Paul Borcharding

Project Engineer: Stacy Gerdin

8. **Schedule:** Construction Manager shall commence the work under this Project Authorization upon receipt of a Notice to Proceed. Construction Manager shall diligently prosecute the Services as described in **Schedule A**, and in accordance with the schedule attached as **Schedule C**. Time is of the essence and failure of Construction Manager to perform work on time as specified in this Project Authorization is a material breach of the Agreement.

9. **Provisions of Agreement and Exhibits Reaffirmed:** All other provisions of and Exhibits to the Agreement shall remain in full force and effect and are reaffirmed. If there is any conflict between this Project Authorization, including the Schedules attached hereto, and any provision of the Agreement relating to this Project Authorization only, the provisions of this Project Authorization, including the Schedules attached hereto, shall control.

IN WITNESS WHEREOF, the Parties hereto have accepted and agreed to this Project Authorization on the dates indicated below.

Dated: September 3, 2020

Dated: August 26, 2020

Davis Joint Unified High School District

Innovative Construction Services, In.

By: _____

By:  _____

Print Name: Matt Best

Print Name: Meredith Collins

Print Title: Deputy Superintendent

Print Title: CFO/Program Manager

SCHEDULE A TO PROJECT AUTHORIZATION NO. 1

Schedule of Work

Construction Management work will begin on August 1, 2020 and continue through May 1, 2021.

[END OF SCHEDULE]

EXHIBIT "B"

CRITERIA AND BILLING FOR EXTRA SERVICES

The following Extra Services to this Agreement shall be performed by Construction Manager if needed and requested by District or Program Manager:

1. Providing services required because of significant documented changes in the Project initiated by the District, including but not limited to size, quality, complexity, or the District's schedule.
2. Providing consultation concerning replacement of work damaged by fire or other cause during construction and furnishing services required in connection with replacement of such work.
3. Providing services made necessary by the default of Contractor, or by major defects or deficiencies in the work of the Contractor, or by failure of performance of the District's consultants.
4. Seeking variances or changes to agency guidelines on behalf of the District when so directed by the District.
5. Preparing to serve or serving as a witness in connection with any public hearing, dispute resolution proceeding or legal proceeding, other than that necessitated by the negligent acts, errors or omissions of Construction Manager or where the Construction Manager is a party thereto, except for a Contractor's hearing necessitated by a bid protest or by a Contractor's request to substitute a subcontractor, or by handling of any stop payment notices.
6. Performing technical inspection and testing.
7. Providing other services not otherwise included in this Agreement and not customarily furnished in accordance with the generally accepted scope of construction management practice.
8. The mark-up on any approved reimbursable item of Extra Services shall not exceed five percent (5%).
9. Format and Content of Invoices (Extra Services Only):

Construction Manager acknowledges that the District requires Construction Manager's invoices to include detailed explanations of the

Extra Services performed. For example, a six hour charge for "RFIs and CORs" is unacceptable and will not be payable. A more detailed explanation, with specificity, is required. This includes a separate entry for each RFI, PCO, CCD and change order. For example, the following descriptions, in addition to complying with all other terms of this Agreement, would be payable. The times indicated below are just placeholders:

Review RFI 23; review plans and specifications for response to same; prepare responses to same and forward to contractor, district, construction manager, and project inspector.	0.8 hours
Review COR 8; review scope of same and plans and specifications for appropriateness of same; prepare draft change order and language for same.	0.7 hours
Review COR 11; review scope of same and plans and specifications for appropriateness of same; prepare rejection of COR 11 for review by district, CM, IOR.	1.2 hours

[END OF EXHIBIT]

EXHIBIT "C"

FEE SCHEDULE

Compensation

1. The Construction Manager's fee set forth in this Agreement shall be full compensation for all of Construction Manager's Services incurred in its performance, including, without limitation, all costs for personnel, travel within two hundred (200) miles of the Project location (travel reimbursements must be approved by District prior to travel), offices, per diem expenses, office supplies, printing, providing, or shipping of deliverables in the quantities set forth in **Exhibit "A."** Except as expressly set forth in the Agreement and **Exhibit "B,"** there shall be no payment for extra costs or expenses.
2. The amount of compensation shall be the amount set forth in the Agreement, including all billed expenses. No compensation will be paid or due, without advance written approval of the District.

Construction Management Services:

August, 2020	\$13,560
September, 2020	\$19,680
October, 2020	\$19,680
November, 2020	\$19,680
December, 2020	\$22,820
January, 2021	\$12,520
February, 2021	\$9,380
March, 2021	\$6,640
April, 2021	\$3,520
Total Fee:	\$127,480

Method of Payment of Basic Services

1. Construction Manager shall submit monthly invoices on a form and in the format approved by the District.
2. Construction Manager shall submit to District on a monthly basis documentation showing proof the payments were made to Construction Manager's Consultants, sub-consultants, and/or subcontractors.

3. Upon receipt and approval of Construction Manager's invoices, except as provided in subdivision 5 herein, the District agrees to make payments of undisputed amounts within sixty (60) days of receipt of the invoice as follows:
4. If Construction Manager fails to timely and completely perform its obligations under this Agreement, the District may withhold or deduct the amounts that would be due therefor from amounts otherwise due Construction Manager hereunder with the amounts withheld or deducted being released after Construction Manager has fully cured such failure of performance, less costs, damages or losses sustained by the District resulting therefrom.

[END OF EXHIBIT]

EXHIBIT "D"

**CRIMINAL BACKGROUND INVESTIGATION/FINGERPRINTING
CERTIFICATION**

PROJECT/CONTRACT NO.: 2 between the Davis Joint Unified High School District ("District") and Innovative Construction Services, Inc. ("Construction Manager") for the Preschool at Korematsu Elementary School Project ("Contract" or "Project").

The undersigned does hereby certify to the governing board of the District as follows:

That I am a representative of the Construction Manager currently under contract with the District; that I am familiar with the facts herein certified; and that I am authorized and qualified to execute this certificate on behalf of Construction Manager.

Construction Manager certifies that it has taken at least one of the following actions with respect to the construction Project that is the subject of the Contract (check all that apply):

- ☒ The Construction Manager is a sole proprietor and intends to comply with the fingerprinting requirements of Education Code section 45125.1(k) with respect to all Construction Manager's employees who may have contact with District pupils in the course of providing services pursuant to the Contract, and hereby agrees to the District's preparation and submission of fingerprints such that the California Department of Justice may determine that none of those employees has been convicted of a felony, as that term is defined in Education Code section 45122.1. No work shall commence until such determination by DOJ has been made.

As an authorized District official, I am familiar with the facts herein certified, and am authorized to execute this certificate on behalf of the District and undertake to prepare and submit Construction Manager's fingerprints as if he or she was an employee of the District.

Date: September 3, 2020

District Representative's Name and Title: Bruce Colby, Chief Business & Operations Officer

District Representative's Signature: _____

EXHIBIT "A"

RESPONSIBILITIES AND SERVICES OF CONSTRUCTION MANAGER

1.	BASIC SERVICES	A-1
2.	GENERAL PROJECT SERVICES	A-5
3.	PRECONSTRUCTION PHASE	A-5
4.	PRE-BID PHASE	A-7
5.	BIDDING PHASE	A-8
6.	CONSTRUCTION PHASE	A-9
7.	PROJECT COMPLETION	A-12
8.	FINAL DOCUMENTS	A-14
9.	WARRANTY	A-14

EXHIBIT "A"

RESPONSIBILITIES AND SERVICES OF CONSTRUCTION MANAGER

Construction Manager shall provide professional services necessary for completing the following:

1. BASIC SERVICES

- 1.1. Provide work which shall comply with professional standards and applicable requirements of federal, state, and local law.
- 1.2. Monitor and advise the District as to all material developments in the Project. Maintain reporting systems for scope, sequencing, scheduling, budgets and communication for the Project using existing District software.
- 1.3. Be the focal point of all communication to and from construction Contractor(s).
- 1.4. Implement methods to track all expenditures on the Project. Construction Manager shall generate monthly reports to the District reflecting this information.
- 1.5. Prepare methods to track and report on schedule status for the Project. Construction Manager shall develop master schedules and milestone schedules for the Project, and shall report on same each month to the District.
- 1.6. The Construction Manager may be requested to assist with preparation of items requiring Board approval and routine reporting.
- 1.7. Construction Manager shall work cooperatively with the Design Team and the District to:
 - 1.7.1. Define and schedule the Project.
 - 1.7.2. Provide Services that will result in the development of an overall Project strategy with regard to phases, construction schedules, timing, budget, prequalification, contractor procurement, construction materials, building systems, and equipment.

- 1.8. Perform constructability reviews, determine construction feasibility, availability of materials and labor, time requirements for installation and construction, and factors related to cost, including costs of alternative designs, of materials, preliminary budgets, and possible economies.
- 1.9. Interface with the Contractor and all subcontractors all general and/or trade Contractors during construction to ensure that the District is provided with an acceptable Project and the best value for taxpayer dollars.
- 1.10. Advise the District as to the regulatory agencies that have jurisdiction over any portion or all of the Project, and as to coordination with and implementation of the requirements of the regulatory agencies, including without limitation DSA.
- 1.11. Contract for or employ, at Construction Manager's expense, sub-consultant(s) to the extent deemed necessary for Construction Manager's services. Nothing in the foregoing shall create any contractual relationship between the District and any sub-consultant(s) employed by the Construction Manager under terms of this Agreement.
- 1.12. Cooperate with the District, Board, and other professionals employed by the District for the design, coordination or management of other work related to the Project, including District staff and consultants, Program Manager, project manager(s), citizens' oversight committee, other District committees, and the community to facilitate the timely completion of the Project within Board-approved budgets and to District design standards.
- 1.13. Chair, conduct and take minutes of periodic meetings between District and its design professional(s), the Site Committee meetings, and construction meetings during the course of the Project. Construction Manager shall invite the District and/or its representative and the Project Inspector to participate in these meetings. Construction Manager shall keep meeting minutes to document comments generated in these meetings.
- 1.14. Develop for District approval a Project time schedule at the start of Project development that does the following:

- 1.14.1. Provides sufficient time for prequalification, and if necessary the resolution of any appeals, bidding, and, if necessary, rebidding, or negotiating if applicable, the Project;
 - 1.14.2. Coordinates and integrates the design professional(s)' design efforts with bidding schedules;
 - 1.14.3. Includes realistic activity sequences and durations, allocation of labor and materials and delivery of products requiring long lead-time procurement; and
 - 1.14.4. Takes into account the District's occupancy requirements (showing portions of the Project having occupancy priority and ongoing operational occupancy requirements).
- 1.15. Be responsible for the professional quality and technical accuracy of all cost estimates, constructability reviews, studies, reports, projections, opinions of the probable cost of construction, and other services furnished by Construction Manager under this Agreement as well as coordination with all Master Plans, studies, reports and other information provided by District to Construction Manager. Construction Manager shall, without additional compensation, correct or revise any errors or omissions in materials it generates.
- 1.16. Maintain a log of all meetings, site visits or discussions held in conjunction with the work of the Project, with documentation of major discussion points, observations, decisions, questions or comments. These shall be furnished to the District and/or its representative for inclusion in the overall Project documentation.
- 1.17. Coordinate transmittal of documents to regulatory agencies for review and advise the District of potential problems in completion of such reviews.
- 1.18. Assist with preparation of a bidders list for each bid package for approval by the District.

- 1.19. Assist the District in pre-qualifying bidders if prequalification is permitted or required by the District. This service shall include the following:
 - 1.19.1. Preparation and distribution of prequalification questionnaires;
 - 1.19.2. Receiving and analyzing completed questionnaires;
 - 1.19.3. Interviewing possible bidders, references, bonding agents and financial institutions;
 - 1.19.4. Preparing recommendations for the District; and
 - 1.19.5. Assisting with resolution of any appeals.
- 1.20. Conduct a telephonic and correspondence campaign to attempt to increase interest among qualified bidders.
- 1.21. Assist the District in preparing and placing notices and advertisements to solicit bids for the Project, if requested.
- 1.22. To the extent requested by the District, coordinate the delivery of Bid Documents to the bidders. The District shall obtain the District-approved contract documents from the design professional(s) and the Construction Manager shall arrange for printing, binding, wrapping, and delivery to the bidders. The Construction Manager shall maintain a list of bidders receiving contract documents.
- 1.23. To the extent requested by the District, for Lease Leaseback projects, coordinate Request for Qualifications/Proposal ("RFP") process and assist in negotiation of agreements, including Preliminary Services Agreement, Site Lease, and Facilities Lease with guaranteed maximum price.
- 1.24. Provide documentation, pictures, and other information and assistance to the District for the District's use on a website, and as otherwise necessary, for public access to show Project status.
- 1.25. Ensure that Contractor, all subcontractor(s), Consultants, and sub-consultant(s) comply with any District-approved storm

water management program that is applicable to the Project, at no additional cost to the District.

- 1.26. Provide direction and planning to ensure Project adherence to applicable environmental requirements such as those emanating from the Environmental Protection Agency ("EPA"), Cal/EPA, the California Environmental Quality Act ("CEQA"), Air Quality Management District and State of California and Regional Water Quality Control Board laws, regulations and rules. The Construction Manager shall comply with, and ensure that all Consultants, the Contractors and subcontractors, and all design professionals and their sub-consultants comply with, any storm water pollution prevention plans, other storm water management program and other environmental impact mitigation requirements that are approved by the District and applicable to the Project, at no additional cost to the District.
- 1.27. Maintain accurate Project cost accounting records, using GAAP, on authorized work performed under unit costs, actual costs for labor and material, or other basis for maintaining required accounting records. Construction Manager shall provide accounting records to the District on a monthly basis, or as reasonably requested by District. Construction Manager shall afford the District access to these records and preserve these records for a period of three (3) years after final payment, at no cost to the District.
- 1.28. To the extent requested by the District, assist Architect with the preparation of an estimate of costs for all addenda and coordinate with Architect to submit the estimate to the District for approval. Assist and coordinate with Architect as required to adjust the Construction Cost Budget and other Project costs as indicated in this Agreement and as required in the Agreement for Architectural Services.
- 1.29. Provide and maintain a management presence on the Project site(s).
- 1.30. Construction Manager is **NOT** responsible for:
 - 1.30.1. Ground contamination or hazardous material analysis.

- 1.30.2. Any asbestos testing, design or abatement; however, it shall coordinate and integrate its work with any such information provided by District.
- 1.30.3. Compliance with the California Environmental Quality Act ("CEQA"), except that Construction Manager agrees to coordinate its work with that of any CEQA consultants retained by the District, and the work of Contractor and the Design Team to provide current information for use in CEQA compliance documents and to identify and carry out mitigation measures.
- 1.30.4. Historical significance report.
- 1.30.5. Soils investigation.
- 1.30.6. Geotechnical hazard report.
- 1.30.7. Topographic survey, including utility locating services.
- 1.30.8. Inspections required on-site that fall under any approving agency (e.g., DSA, County, Utilities, etc.)

2. GENERAL PROJECT SERVICES

- 2.1. **General:** Monitor and advise the District as to all material developments on the Project. Construction Manager shall implement with District approval reporting methods for schedules, cost and budget status. The Construction Manager shall be the focal point of all communication to and from construction Contractor and shall be copied on all communications between the District and its design professional(s).
- 2.2. **Scheduling:** Track and report on schedule status for Project using methods. The Construction Manager shall develop Project master schedules and milestone schedules, and review and approve Contractor project schedules and milestone schedules for the project per specifications, and shall report on same each month to the District.
- 2.3. **Cost Controls:** Implement methods to track construction expenditures on the Project using methods. The Construction

Manager shall generate monthly reports to the District reflecting this information.

- 2.4. **Communications to Board:** The Construction Manager may be required to attend Board meetings, and to provide updates at each meeting.

3. PRECONSTRUCTION PHASE

- 3.1. To the extent requested by the District, provide overall coordination of the Project; serve as the focal point of communication, transmitting information to the District and Design Team on general aspects of the Project, including planning, scheduling, cost management, progress reporting, design review, dispute resolution, and documentation. Communications from the construction Contractor to the District and Design Team shall be through the Construction Manager. The Construction Manager shall receive simultaneous copies of all written communications from the District or the Design Team to the construction Contractor.
- 3.2. To the extent requested by the District, assist with the detailed definition of project scope, budget, and schedule, as needed. Review and reconcile cost estimates from the assigned architect and coordinate peer review estimates when requested by the District. Assist in organizing and, if relevant, segregating bid packages for maximum cost effectiveness for the District. Advise the District regarding owner-supplied equipment and other potential cost-saving measures.
- 3.3. To the extent requested by the District, assist the District in the solicitation and retention of design and engineering consultants, and coordinate design consultants' activities and delivery schedules, as needed. Provide value engineering and life cycle cost analysis.
- 3.4. Provide design-phase services in conjunction with the architecture firms awarded the Project by the District. Work with the Architect to conform and refine designs to correlate designs to budget and Facilities Master Plan, if applicable. Review design documents for constructability, scheduling, consistency, and coordination during schematic and design development phases of work. Perform constructability reviews

at appropriate stages of design. Assist with verification of site conditions. Expedite design reviews, including modifications. Keep accurate documentation of all discussions with users regarding scope and resolution.

- 3.5. Prepare and maintain a Construction Management schedule for the Project. Prepare a procurement plan, where required.
- 3.6. To the extent requested by the District, monitor and report to the District on status of design and state approval in relation to the schedule for the Project. Attend meetings to coordinate design efforts for the Program. Assist in identifying and obtaining all necessary approvals.
- 3.7. To the extent requested by the District, solicit proposals, evaluate, and recommend other professional consultants needed to complete the Project.
- 3.8. Implement District-approved implementation procedures, forms and reporting requirements for the Project that involve all members of the Project team, including the District, design professional(s), and construction Contractor(s).
- 3.9. Work with the Design Team and District to develop the final sizes, choice of materials, services and utilities and other detailed design and performance criteria of the Project.
- 3.10. To the extent requested by the District, provide value engineering at the Schematic Design and/or 100% Design Development Phase. This evaluation will consist of a review of the proposed materials, equipment, systems and other items depicted in the design documents and shall be coordinated with the District's design guidelines and design professional(s). The Construction Manager will prepare a value engineering report documenting the results of the evaluation and make recommendations to the District with respect to alternatives, deletions, or amendments of such proposed items that pertain to the anticipated construction costs, useful life, maintenance and operational costs and efficiencies. The Construction Manager shall provide to the District value engineering recommendations and cost/benefit analysis of those recommendations.

- 3.11. Perform or subcontract for constructability reviews of the Project at the Design Development Phase and at 90% of the Construction Documents Phase. The Project Manager shall review the design documents for clarity, consistency, constructability and coordination. The results of the review shall be provided in writing and as notations on the documents to the District. The Construction Manager shall also make recommendations to the District with respect to constructability, construction cost, sequence of construction, and construction duration
- 3.12. Develop master bid/award schedule(s) including construction milestones for the Project through the completion of construction, as directed by the District, in coordination with design professional(s) and advise and consult with the District. Construction Manager shall review and approve construction Contractor's schedules, but shall not dictate any construction Contractor's means and/or methods of performance.
- 3.13. Establish schedules for any Consultant, and for any hazardous materials or other testing, and review costs, estimates, and invoices of each.
- 3.14. Implement a management control system to support such functions as planning, organizing, scheduling, budgeting, reporting progress, and identifying and documenting problems and solutions for the Project. Prepare monthly progress reports for the District and Program Manager regarding the schedule for the Project.
- 3.15. To the extent requested by the District, organize an initial planning workshop to create baseline parameters for the Project, to define overall building requirements, Project strategy, conceptual budget and schedule. Pursuant to understandings reached at these meetings, Construction Manager will assist Program Manager with developing an implementation plan that identifies the various phases of the Project, coordination among phases, and budget and time constraints for each phase of the Project. The plan will include a detailed strategy, master budget and master schedule as well as identification of critical events and milestone activities.

- 3.16. To the extent requested by the District, provide updated cost estimates for the Project at the Schematic Design, Design Development, and Construction Documents Phases as directed by District or Program Manager; coordinate with design professional(s) and Program Manager and reconcile cost estimates with design professional(s)' estimates.
- 3.17. To the extent requested by the District, advise District regarding "green building" technology and lifecycle costing, when applicable.
- 3.18. Fully coordinate all changes requested by any utility company needed to complete the Project.
- 3.19. To the extent requested by the District, assist in reviewing and tailoring the District's front end documents for the Project. Recommend the number of days required for the construction phase (and any sub-phases, such as hazardous material abatement) and recommend the amount of the liquidated damages.

4. PRE-BID PHASE

- 4.1. Develop master schedules for the Project. Develop budget(s) for the Project based on construction cost estimates.
- 4.2. In consultation with the District and according to District-approved policies, procedures, and standards, implement procedures, forms, and reporting requirements for the Project. Establish, accordingly, a communications procedure for the Project that allows for decision making at appropriate levels of responsibility and accountability.
- 4.3. Work with the design professional(s) to modify or add to standard, special, or general conditions for contract documents that might be needed for unique Project or contract conditions, for the District's approval, and/or assist in the development of documents necessary for the bidding phase.
- 4.4. To the extent requested by the District, make recommendations for development and implementation of procedures to comply with applicable bidding or RFP requirements for the Project as applicable and for expediting

completion of the bidding process for the Project. The scope of the foregoing includes without limitation, recommendations of Construction Manager with respect to: (a) pre-qualification of potential contractors; and (b) alternative construction delivery approaches for the Project, including consideration of a single general contractor and/or Lease Leaseback approach to construction for the Project.

5. BIDDING PHASE

- 5.1. To the extent requested by the District, assist with pre-qualification process for the selection of prime and/or sub-contractors based on the detailed definition of Project scope, budget, schedule, and programming support. Develop a list of pre-qualified prime and sub-contractors, as required.
- 5.2. Assist with developing bidders' interest in the Project. Coordinate all bid phase activities with District departments. Assist with conducting pre-bid conferences to familiarize bidders with the bidding documents, and any special systems, materials or methods and with Project procedures. Conduct job walks and bidders' conferences, maintain and prepare minutes of job walks or bidder's conferences. Field questions from bidders, referring questions to design professional(s) and District as required. Coordinate with design professional(s) to respond to bidder questions by addenda.
- 5.3. Assist with preparation of public solicitation notices for District approval. Review, coordinate, and estimate cost of bid phase addenda.
- 5.4. Assist with review of bid proposals for responsiveness to bid requirements, evaluate bidder responsibility, and conduct reference checks. Prepare bid analyses and advise the District on compliance of bidders with District requirements and bid requirements. Report and recommend to the District after review and evaluation. Make recommendations to the District for prequalification of bidders and award of contracts or rejection of bids.
- 5.5. Assist with conducting post-bid conferences as required. Assist and advise regarding bid protests.

- 5.6. If appropriate, coordinate contracting with Contractor awarded the contract, including evaluating bonds and insurance, and negotiate final terms of construction contractor's contract(s), if applicable.
- 5.7. Assist with conducting pre-award conferences with successful bidders.
- 5.8. Assist with scheduling and conducting preconstruction meetings. Maintain, prepare, and distribute minutes.
- 5.9. Assist with the preparation of agenda items for Board approval. Coordinate submittals required by governing agencies.

6. CONSTRUCTION PHASE

- 6.1. Administer the construction Contract.
- 6.2. Review Contractor's submitted schedules, as needed. Administer and coordinate the work of Contractor on a daily basis. Enforce performance, scheduling, and notice requirements. Review Contractor's schedule submittals and make recommendations to the District.
- 6.3. Monitor schedule and cost information for Contractor. Document the progress and costs of the Project. Report and advise proactively on potential schedule and budget variances and impacts. Recommend potential solutions to schedule and cost problems. Work cooperatively with the District, Architect, and Contractor to ensure that Project is delivered on time and within budget. Review construction progress and prepare reports.
- 6.4. Verify permits, approvals, bonds, insurances, and schedules of values. Coordinate with DSA Project inspector, and ensure compliance with all DSA reporting and closeout requirements. Submit necessary reports to state and local authorities.
- 6.5. Monitor the construction Contractor to verify that tools, equipment, and labor are furnished and work performed and completed within the time required or indicated by the plans and specifications, under the direction and to the satisfaction of the District. The Construction Manager expressly agrees to

verify that the specifications are met, observed, performed, and followed in accordance with the professional standards of care for construction management.

- 6.6. Coordinate work of the construction Contractor and effectively manage the Project to achieve the District's objectives in relation to cost, time and quality.
- 6.7. Provide continuous on-site construction management personnel, as needed. Conduct construction meetings for the Project to discuss and resolve such matters as progress, quality and scheduling. Said meetings shall be weekly unless Project conditions do not require that frequency. Prepare and promptly distribute minutes. When required by field or other conditions, construction progress, or the quality of workmanship, conduct special construction meetings; record, prepare, and distribute minutes of these meetings to the District, the affected construction Contractor, and design professional(s).
- 6.8. Establish and implement team communication procedures.
- 6.9. Ensure that construction Contractor provides construction schedules as required by the construction Contracts, including activity sequences and durations, submittal schedule, or procurement schedule for products that require long lead time. The Construction Manager shall review construction Contractor's construction schedules for conformity with the requirements of the construction Contract and conformity with the overall schedule for the Project. Where construction Contractor's construction schedules do not so conform, the Construction Manager will take appropriate measures to secure compliance, subject to District approval.
- 6.10. Ensure construction Contractor's compliance with the requirements of the respective construction Contract for updating, revising, and other obligations relative to their respective construction schedules.
- 6.11. Cost Control. Construction Manager shall develop and monitor an effective system of construction cost control for the Project. Construction Manager shall identify variances between actual and budgeted or estimated costs and advise District and design

professional(s) whenever a Project cost exceeds budgets or estimates. Construction Manager shall manage the construction bids and contracts in accordance with the Construction Budget.

- 6.12. Continually monitor whether construction contract requirements are being fulfilled and recommend courses of action to the District when Contractor fails to fulfill contractual requirements.
- 6.13. The Construction Manager may authorize minor variations in the work from the requirements of the contract documents that do not involve an adjustment in the contract price or the contract time or design and which are consistent with the overall intent of the contract documents. The Construction Manager shall provide to the design professional(s) and the District copies of these authorizations.
- 6.14. Evaluate and process payment applications and verify progress.
- 6.15. Verify that safety programs are developed and submitted by the construction Contractor as required by the Contract. Neither Construction Manager, Program Manager, nor District shall be responsible for or have any liability for Contractor's failure to provide, comply with, or enforce said safety programs.
- 6.16. Implement quality control program, including As-Built Drawings accuracy. Coordinate and evaluate Contractor's recovery schedules.
- 6.17. Record the progress of the Project by a log.
- 6.18. Monitor ongoing Project costs to verify that projected costs do not exceed approved budget and provide the District timely notice of any potential increase in costs in excess of approved budgets provided to Construction Manager.
- 6.19. Negotiate Contractor's proposals and review change orders prepared by design professional(s), with design professional(s)' input as needed, for approval by the District.

- 6.20. Evaluate and process change order requests. Make recommendations to the District. Determine cost and schedule effects of change orders. Prepare change order reports and maintain a change order log for the Project and implement procedures to expedite processing of change orders.
- 6.21. Assist the District in coordinating the services of special consultants and testing laboratories on the Project.
- 6.22. In conjunction with the design professional(s), monitor work of the construction Contractor to determine that the work is being performed in accordance with the requirements of the respective construction documents for the Project, including but not limited to the plans, specifications, addenda, and all other contract documents, as well as all applicable laws, regulations and directives of agencies with jurisdiction over any of the Project. As appropriate, with assistance of design professional(s), make recommendations to the District and Program Manager regarding special inspection or testing of work that is not in accordance with the provisions of the contract documents.
- 6.23. To guard District against defects in the work of the construction Contractor, the Construction Manager shall implement a quality control program to monitor the quality and workmanship of construction for conformity with:
 - 6.23.1. Accepted industry standards;
 - 6.23.2. Applicable laws, rules, or ordinances; and
 - 6.23.3. The design documents and contract documents.
- 6.24. Where the work of a construction Contractor does not conform as set forth above, the Construction Manager shall, with the input of design professional(s) and Inspector of Record:
 - 6.24.1. Notify the District of any non-conforming work observed by the Construction Manager;
 - 6.24.2. Reject the non-conforming work; and

- 6.24.3. Take any and all action(s) necessary to compel the construction Contractor to correct the work.
- 6.25. Evaluate, track, and maintain logs of requests for information ("RFI") from construction Contractor and responses, shop drawings, samples, and other submittals, based, in part, on information obtained from the design professional(s). Advise District and Program Manager as to status and criticality of RFIs.
- 6.26. Implement procedures, in collaboration with the District and design professional(s), for expediting the processing and approval of shop drawings, product data, samples, and other submittals for each contract. Receive and transmit all submittals from the construction Contractor to the design professional(s) for review and approval. Maintain submittal and shop drawing logs.
- 6.27. Record the progress of work at the Project. When present, prepare daily reports for the Project containing a record of weather, construction Contractor(s) present and their number of workers, work accomplished, problems encountered, and other relevant data.
- 6.28. Prepare and distribute monthly project status reports for the Project including updates on project activities, progress of work, outstanding issues, potential problems, schedule, and status of RFIs, change orders, and submittals.
- 6.29. Coordinate, assist, and support Architect during construction administration phase as required.
- 6.30. This is responsibility of Contractor to maintain this documentation on as-builts. At the completion of the Project, deliver all such records to District. Construction Contractor and design professional(s) share responsibility to prepare Record Drawings and As-Built Drawings.
- 6.31. Coordinate the move into the Project.
- 6.32. Work with District team to develop lists of incomplete or unsatisfactory work ("punch lists").

- 6.33. Fully document and prepare deductive change orders for extra services of consultants that are the responsibility of a Contractor or another consultant. Present such a change order for signature by the Contractor or consultant.
- 6.34. Determine final completion and payment. Determine completion dates, final payments, and release of retention. Coordinate procurement and installation of Furniture, Fixtures, and Equipment ("FF&E").

7. PROJECT COMPLETION

- 7.1. The Construction Manager shall coordinate with District staff, the construction Contractor's check-outs of utilities, operational systems and equipment, and start-up and testing. The Construction Manager shall coordinate the records of start-up and testing as provided by the construction Contractor and shall ensure the District of compliance with applicable provisions of the Contract, that all work has been performed and accepted, and that all systems are complete and operative.
- 7.2. At the punch list phase of the Project or designated portions thereof, the Construction Manager, in consultation with the Architect, shall ensure the preparation of a list of incomplete or unsatisfactory work or work which does not conform to the requirements of the contract documents ("punch list work") and a schedule for the completion of the punch list work. The Construction Manager shall provide this list to the construction Contractor. The Construction Manager shall coordinate construction Contractor's performance and completion of punch list work. The Construction Manager shall review, with the Architect and District, the completed punch list work. The Construction Manager shall ensure, with input of the Architect, that the completed punch list work complies with applicable provisions of the construction Contract.
- 7.3. The Construction Manager shall determine, with the Architect and District, when the Project or designated portions thereof are complete.
- 7.4. The Construction Manager shall conduct, with the Architect and District, final inspections of the Project or designated portions

thereof. The Construction Manager shall notify the District of final completion.

- 7.5. The Construction Manager shall consult with the Architect and District and shall determine when the Project and the construction Contractor's work are finally completed. The Construction Manager shall assist with the issuance of a Certificate of Final Completion, and shall provide to the District a written recommendation regarding payment to the Contractor.
- 7.6. The Construction Manager shall coordinate close-out procedures, including personnel training. Advise District staff on systems operations, training and close-out of Projects.
- 7.7. The Construction Manager shall coordinate and expedite Contractor close-out requirements, including guarantees/warranties, certificates, keys, manuals, As-Built Drawings, Record Drawings, specifications, daily logs, and verified reports. Ensure that all other project participants submit necessary close-out documentation.
- 7.8. The Construction Manager shall coordinate operational safety reviews with District post occupancy and manage corrective work as necessary.
- 7.9. The Construction Manager shall ensure that all building commissioning requirements have been fulfilled in a timely manner through District commissioning agents.
- 7.10. The Construction Manager shall obtain occupancy permits (where required), coordinate final testing, documentation, and regulatory inspections. Prepare occupancy plan report.
- 7.11. The Construction Manager shall prepare final accounting reports.

8. FINAL DOCUMENTS

The Construction Manager, in conjunction with the Design Team, shall review and monitor all As-Built Drawings, maintenance and operations manuals, and other closeout documents to be sure that all required documents meeting contract requirements are provided, and

shall secure and transmit to the District and Program Manager those documents and all required guarantees, keys, manuals, record drawings, and daily logs. The Construction Manager shall also forward all documents and plans to the District upon completion of the project and ensure all such plans and documents are well organized for any appropriate audit or review of the Project.

9. WARRANTY

The Construction Manager shall assist Program Manager as necessary to implement a Warranty Inspection and Warranty Work procedure for the Project that Contractor must follow. The procedure shall include a twelve (12) month call back period and a final warranty inspection eleven (11) months after Project completion to inspect the Project and identify any outstanding warranty work.

10. PROJECT CLOSEOUT

To the extent requested by District, the Construction Manager shall assist District, Architect, and Inspector of Record, as necessary, to ensure all information and documentation necessary for Project closeout with the DSA is complete and the Project is timely closed out with DSA. This includes but is not limited to reports from independent consultants, inspectors, testing laboratories, and corresponding or required DSA forms.

[END OF EXHIBIT]

PROJECT AUTHORIZATION NO. 3
TO AGREEMENT FOR CONSTRUCTION MANAGEMENT SERVICES

This Project Authorization No. 3 ("Project Authorization") is an addendum supplemental to the Agreement for Construction Management Services by and between the Davis Joint Unified High School District and Innovative Construction Services, Inc. ("Agreement"), and is entered into by and between the Davis Joint Unified High School District ("District") and Innovative Construction Services, Inc. ("Construction Manager," and together with the District, "Parties"), as follows:

RECITALS

WHEREAS, the Parties entered into the Agreement effective as of September 3, 2020 for the provision of construction management services in connection with the District's Measure M capital facilities improvements ("Program");

WHEREAS, the Agreement provides that the Parties may execute this Project Authorization to authorize Construction Manager's work on certain Project(s) under the Program, as identified herein; and

WHEREAS, the Parties wish to supplement the Agreement to assign Construction Manager the Project(s) and accompanying terms, including but not limited to scope and payment, contained herein.

NOW THEREFORE, in consideration of the mutual promises and covenants set forth above and contained herein, the Parties hereby agree as follows:

AGREEMENT

1. **Effect:** This Project Authorization is entered into pursuant to the Agreement, and, when fully executed, is considered as an integral part of said Agreement subject to all the provisions and conditions thereof.
2. **Project:** The District does hereby authorize Construction Manager to provide professional services on the following project:

Hydration Stations at Various School Sites

The scope of work will include the provision of professional construction management services in connection with the Project.

3. **Services:** Services include those set forth in **Schedule A**, which is attached hereto and incorporated herein by this reference.

EXHIBITS

Agreement for Construction Management Services - Hydration Stations
Davis Joint Unified High School District
DWK DMS 3521792v1

4. **Construction Cost Budget and Construction Budget**

4.1. The Construction Budget, as defined in the Agreement, for the Project is Four Hundred Thousand Dollars (\$400,000).

5. **Fee:** The District shall pay Construction Manager for all Services pursuant to this Project Authorization an amount equal to the following ("Fee") an amount not exceed Forty Eight Thousand, Four Hundred Dollars (\$48,400 Dollars) based on the hourly rates and reimbursable expenses set forth in **Exhibit "C"** to the Agreement. The District shall pay Construction Manager the Fee consistent with the provisions of **Exhibit "C."**

6. **Extra Services:** To be performed and billed in accordance with Exhibit "B" to the Agreement.

7. **Staffing:** Services shall be provided by the key personnel identified in the Agreement, unless otherwise identified below:

Project Executive: Eric Hartwell

Project Director: Dave Fukui

Senior Project Manager: Meredith Collins

Project Manager: Rick Hureaux and Paul Borcharding

Project Engineer: Stacy Gerdin

8. **Schedule:** Construction Manager shall commence the work under this Project Authorization upon receipt of a Notice to Proceed. Construction Manager shall diligently prosecute the Services as described in **Schedule A**, and in accordance with the schedule attached as **Schedule C**. Time is of the essence and failure of Construction Manager to perform work on time as specified in this Project Authorization is a material breach of the Agreement.

9. **Provisions of Agreement and Exhibits Reaffirmed:** All other provisions of and Exhibits to the Agreement shall remain in full force and effect and are reaffirmed. If there is any conflict between this Project Authorization, including the Schedules attached hereto, and any provision of the Agreement relating to this Project Authorization only, the provisions of this Project Authorization, including the Schedules attached hereto, shall control.

IN WITNESS WHEREOF, the Parties hereto have accepted and agreed to this Project Authorization on the dates indicated below.


Dated: September 3, 2020

Dated: August 26, 2020

Davis Joint Unified High School District

Innovative Construction Services, In.

By: _____

By:  _____

Print Name: Matt Best

Print Name: Meredith Collins

Print Title: Deputy Superintendent

Print Title: CFO/Program Manager

SCHEDULE A TO PROJECT AUTHORIZATION NO. 3

Schedule of Work

Construction Management work will begin on August 1, 2020 and continue through July 1, 2021.

[END OF SCHEDULE]

EXHIBIT "B"

CRITERIA AND BILLING FOR EXTRA SERVICES

The following Extra Services to this Agreement shall be performed by Construction Manager if needed and requested by District or Program Manager:

1. Providing services required because of significant documented changes in the Project initiated by the District, including but not limited to size, quality, complexity, or the District's schedule.
2. Providing consultation concerning replacement of work damaged by fire or other cause during construction and furnishing services required in connection with replacement of such work.
3. Providing services made necessary by the default of Contractor, or by major defects or deficiencies in the work of the Contractor, or by failure of performance of the District's consultants.
4. Seeking variances or changes to agency guidelines on behalf of the District when so directed by the District.
5. Preparing to serve or serving as a witness in connection with any public hearing, dispute resolution proceeding or legal proceeding, other than that necessitated by the negligent acts, errors or omissions of Construction Manager or where the Construction Manager is a party thereto, except for a Contractor's hearing necessitated by a bid protest or by a Contractor's request to substitute a subcontractor, or by handling of any stop payment notices.
6. Performing technical inspection and testing.
7. Providing other services not otherwise included in this Agreement and not customarily furnished in accordance with the generally accepted scope of construction management practice.
8. The mark-up on any approved reimbursable item of Extra Services shall not exceed five percent (5%).
9. Format and Content of Invoices (Extra Services Only):

Construction Manager acknowledges that the District requires Construction Manager's invoices to include detailed explanations of the

Extra Services performed. For example, a six hour charge for “RFIs and CORs” is unacceptable and will not be payable. A more detailed explanation, with specificity, is required. This includes a separate entry for each RFI, PCO, CCD and change order. For example, the following descriptions, in addition to complying with all other terms of this Agreement, would be payable. The times indicated below are just placeholders:

Review RFI 23; review plans and specifications for response to same; prepare responses to same and forward to contractor, district, construction manager, and project inspector.	0.8 hours
Review COR 8; review scope of same and plans and specifications for appropriateness of same; prepare draft change order and language for same.	0.7 hours
Review COR 11; review scope of same and plans and specifications for appropriateness of same; prepare rejection of COR 11 for review by district, CM, IOR.	1.2 hours

[END OF EXHIBIT]

EXHIBIT "C"

FEE SCHEDULE

Compensation

1. The Construction Manager's fee set forth in this Agreement shall be full compensation for all of Construction Manager's Services incurred in its performance, including, without limitation, all costs for personnel, travel within two hundred (200) miles of the Project location (travel reimbursements must be approved by District prior to travel), offices, per diem expenses, office supplies, printing, providing, or shipping of deliverables in the quantities set forth in **Exhibit "A."** Except as expressly set forth in the Agreement and **Exhibit "B,"** there shall be no payment for extra costs or expenses.
2. The amount of compensation shall be the amount set forth in the Agreement, including all billed expenses. No compensation will be paid or due, without advance written approval of the District.

Construction Management Services:

Monthly Fee:	11 months	\$4,400
Total Fee:		\$48,400

Method of Payment of Basic Services

1. Construction Manager shall submit monthly invoices on a form and in the format approved by the District.
2. Construction Manager shall submit to District on a monthly basis documentation showing proof the payments were made to Construction Manager's Consultants, sub-consultants, and/or subcontractors.
3. Upon receipt and approval of Construction Manager's invoices, except as provided in subdivision 5 herein, the District agrees to make payments of undisputed amounts within sixty (60) days of receipt of the invoice as follows:
4. If Construction Manager fails to timely and completely perform its obligations under this Agreement, the District may withhold or deduct the amounts that would be due therefor from amounts otherwise due

Construction Manager hereunder with the amounts withheld or deducted being released after Construction Manager has fully cured such failure of performance, less costs, damages or losses sustained by the District resulting therefrom.

[END OF EXHIBIT]

EXHIBIT "D"

**CRIMINAL BACKGROUND INVESTIGATION/FINGERPRINTING
CERTIFICATION**

PROJECT/CONTRACT NO.: 3 between the Davis Joint Unified High School District ("District") and Innovative Construction Services, Inc. ("Construction Manager") for the Hydration Stations at Various School Sites Project ("Contract" or "Project").

The undersigned does hereby certify to the governing board of the District as follows:

That I am a representative of the Construction Manager currently under contract with the District; that I am familiar with the facts herein certified; and that I am authorized and qualified to execute this certificate on behalf of Construction Manager.

Construction Manager certifies that it has taken at least one of the following actions with respect to the construction Project that is the subject of the Contract (check all that apply):

- ☒ The Construction Manager is a sole proprietor and intends to comply with the fingerprinting requirements of Education Code section 45125.1(k) with respect to all Construction Manager's employees who may have contact with District pupils in the course of providing services pursuant to the Contract, and hereby agrees to the District's preparation and submission of fingerprints such that the California Department of Justice may determine that none of those employees has been convicted of a felony, as that term is defined in Education Code section 45122.1. No work shall commence until such determination by DOJ has been made.

As an authorized District official, I am familiar with the facts herein certified, and am authorized to execute this certificate on behalf of the District and undertake to prepare and submit Construction Manager's fingerprints as if he or she was an employee of the District.

Date: September 3, 2020

District Representative's Name and Title: Matt Best, Deputy Superintendent

District Representative's Signature: _____

EXHIBIT "A"

RESPONSIBILITIES AND SERVICES OF CONSTRUCTION MANAGER

1.	BASIC SERVICES	A-1
2.	GENERAL PROJECT SERVICES	A-5
3.	PRECONSTRUCTION PHASE	A-5
4.	PRE-BID PHASE	A-7
5.	BIDDING PHASE	A-8
6.	CONSTRUCTION PHASE	A-9
7.	PROJECT COMPLETION	A-12
8.	FINAL DOCUMENTS	A-14
9.	WARRANTY	A-14

EXHIBIT "A"

RESPONSIBILITIES AND SERVICES OF CONSTRUCTION MANAGER

Construction Manager shall provide professional services necessary for completing the following:

1. BASIC SERVICES

- 1.1. Provide work which shall comply with professional standards and applicable requirements of federal, state, and local law.
- 1.2. Monitor and advise the District as to all material developments in the Project. Maintain reporting systems for scope, sequencing, scheduling, budgets and communication for the Project using existing District software.
- 1.3. Be the focal point of all communication to and from construction Contractor(s).
- 1.4. Implement methods to track all expenditures on the Project. Construction Manager shall generate monthly reports to the District reflecting this information.
- 1.5. Prepare methods to track and report on schedule status for the Project. Construction Manager shall develop master schedules and milestone schedules for the Project, and shall report on same each month to the District.
- 1.6. The Construction Manager may be requested to assist with preparation of items requiring Board approval and routine reporting.
- 1.7. Construction Manager shall work cooperatively with the Design Team and the District to:
 - 1.7.1. Define and schedule the Project.
 - 1.7.2. Provide Services that will result in the development of an overall Project strategy with regard to phases, construction schedules, timing, budget, prequalification, contractor procurement, construction materials, building systems, and equipment.

- 1.8. Perform constructability reviews, determine construction feasibility, availability of materials and labor, time requirements for installation and construction, and factors related to cost, including costs of alternative designs, of materials, preliminary budgets, and possible economies.
- 1.9. Interface with the Contractor and all subcontractors all general and/or trade Contractors during construction to ensure that the District is provided with an acceptable Project and the best value for taxpayer dollars.
- 1.10. Advise the District as to the regulatory agencies that have jurisdiction over any portion or all of the Project, and as to coordination with and implementation of the requirements of the regulatory agencies, including without limitation DSA.
- 1.11. Contract for or employ, at Construction Manager's expense, sub-consultant(s) to the extent deemed necessary for Construction Manager's services. Nothing in the foregoing shall create any contractual relationship between the District and any sub-consultant(s) employed by the Construction Manager under terms of this Agreement.
- 1.12. Cooperate with the District, Board, and other professionals employed by the District for the design, coordination or management of other work related to the Project, including District staff and consultants, Program Manager, project manager(s), citizens' oversight committee, other District committees, and the community to facilitate the timely completion of the Project within Board-approved budgets and to District design standards.
- 1.13. Chair, conduct and take minutes of periodic meetings between District and its design professional(s), the Site Committee meetings, and construction meetings during the course of the Project. Construction Manager shall invite the District and/or its representative and the Project Inspector to participate in these meetings. Construction Manager shall keep meeting minutes to document comments generated in these meetings.
- 1.14. Develop for District approval a Project time schedule at the start of Project development that does the following:

- 1.14.1. Provides sufficient time for prequalification, and if necessary the resolution of any appeals, bidding, and, if necessary, rebidding, or negotiating if applicable, the Project;
 - 1.14.2. Coordinates and integrates the design professional(s)' design efforts with bidding schedules;
 - 1.14.3. Includes realistic activity sequences and durations, allocation of labor and materials and delivery of products requiring long lead-time procurement; and
 - 1.14.4. Takes into account the District's occupancy requirements (showing portions of the Project having occupancy priority and ongoing operational occupancy requirements).
- 1.15. Be responsible for the professional quality and technical accuracy of all cost estimates, constructability reviews, studies, reports, projections, opinions of the probable cost of construction, and other services furnished by Construction Manager under this Agreement as well as coordination with all Master Plans, studies, reports and other information provided by District to Construction Manager. Construction Manager shall, without additional compensation, correct or revise any errors or omissions in materials it generates.
- 1.16. Maintain a log of all meetings, site visits or discussions held in conjunction with the work of the Project, with documentation of major discussion points, observations, decisions, questions or comments. These shall be furnished to the District and/or its representative for inclusion in the overall Project documentation.
- 1.17. Coordinate transmittal of documents to regulatory agencies for review and advise the District of potential problems in completion of such reviews.
- 1.18. Assist with preparation of a bidders list for each bid package for approval by the District.

- 1.19. Assist the District in pre-qualifying bidders if prequalification is permitted or required by the District. This service shall include the following:
 - 1.19.1. Preparation and distribution of prequalification questionnaires;
 - 1.19.2. Receiving and analyzing completed questionnaires;
 - 1.19.3. Interviewing possible bidders, references, bonding agents and financial institutions;
 - 1.19.4. Preparing recommendations for the District; and
 - 1.19.5. Assisting with resolution of any appeals.
- 1.20. Conduct a telephonic and correspondence campaign to attempt to increase interest among qualified bidders.
- 1.21. Assist the District in preparing and placing notices and advertisements to solicit bids for the Project, if requested.
- 1.22. To the extent requested by the District, coordinate the delivery of Bid Documents to the bidders. The District shall obtain the District-approved contract documents from the design professional(s) and the Construction Manager shall arrange for printing, binding, wrapping, and delivery to the bidders. The Construction Manager shall maintain a list of bidders receiving contract documents.
- 1.23. To the extent requested by the District, for Lease Leaseback projects, coordinate Request for Qualifications/Proposal ("RFP") process and assist in negotiation of agreements, including Preliminary Services Agreement, Site Lease, and Facilities Lease with guaranteed maximum price.
- 1.24. Provide documentation, pictures, and other information and assistance to the District for the District's use on a website, and as otherwise necessary, for public access to show Project status.
- 1.25. Ensure that Contractor, all subcontractor(s), Consultants, and sub-consultant(s) comply with any District-approved storm

water management program that is applicable to the Project, at no additional cost to the District.

- 1.26. Provide direction and planning to ensure Project adherence to applicable environmental requirements such as those emanating from the Environmental Protection Agency ("EPA"), Cal/EPA, the California Environmental Quality Act ("CEQA"), Air Quality Management District and State of California and Regional Water Quality Control Board laws, regulations and rules. The Construction Manager shall comply with, and ensure that all Consultants, the Contractors and subcontractors, and all design professionals and their sub-consultants comply with, any storm water pollution prevention plans, other storm water management program and other environmental impact mitigation requirements that are approved by the District and applicable to the Project, at no additional cost to the District.
- 1.27. Maintain accurate Project cost accounting records, using GAAP, on authorized work performed under unit costs, actual costs for labor and material, or other basis for maintaining required accounting records. Construction Manager shall provide accounting records to the District on a monthly basis, or as reasonably requested by District. Construction Manager shall afford the District access to these records and preserve these records for a period of three (3) years after final payment, at no cost to the District.
- 1.28. To the extent requested by the District, assist Architect with the preparation of an estimate of costs for all addenda and coordinate with Architect to submit the estimate to the District for approval. Assist and coordinate with Architect as required to adjust the Construction Cost Budget and other Project costs as indicated in this Agreement and as required in the Agreement for Architectural Services.
- 1.29. Provide and maintain a management presence on the Project site(s).
- 1.30. Construction Manager is **NOT** responsible for:
 - 1.30.1. Ground contamination or hazardous material analysis.

- 1.30.2. Any asbestos testing, design or abatement; however, it shall coordinate and integrate its work with any such information provided by District.
- 1.30.3. Compliance with the California Environmental Quality Act ("CEQA"), except that Construction Manager agrees to coordinate its work with that of any CEQA consultants retained by the District, and the work of Contractor and the Design Team to provide current information for use in CEQA compliance documents and to identify and carry out mitigation measures.
- 1.30.4. Historical significance report.
- 1.30.5. Soils investigation.
- 1.30.6. Geotechnical hazard report.
- 1.30.7. Topographic survey, including utility locating services.
- 1.30.8. Inspections required on-site that fall under any approving agency (e.g., DSA, County, Utilities, etc.)

2. GENERAL PROJECT SERVICES

- 2.1. **General:** Monitor and advise the District as to all material developments on the Project. Construction Manager shall implement with District approval reporting methods for schedules, cost and budget status. The Construction Manager shall be the focal point of all communication to and from construction Contractor and shall be copied on all communications between the District and its design professional(s).
- 2.2. **Scheduling:** Track and report on schedule status for Project using methods. The Construction Manager shall develop Project master schedules and milestone schedules, and review and approve Contractor project schedules and milestone schedules for the project per specifications, and shall report on same each month to the District.
- 2.3. **Cost Controls:** Implement methods to track construction expenditures on the Project using methods. The Construction

Manager shall generate monthly reports to the District reflecting this information.

- 2.4. **Communications to Board:** The Construction Manager may be required to attend Board meetings, and to provide updates at each meeting.

3. PRECONSTRUCTION PHASE

- 3.1. To the extent requested by the District, provide overall coordination of the Project; serve as the focal point of communication, transmitting information to the District and Design Team on general aspects of the Project, including planning, scheduling, cost management, progress reporting, design review, dispute resolution, and documentation. Communications from the construction Contractor to the District and Design Team shall be through the Construction Manager. The Construction Manager shall receive simultaneous copies of all written communications from the District or the Design Team to the construction Contractor.
- 3.2. To the extent requested by the District, assist with the detailed definition of project scope, budget, and schedule, as needed. Review and reconcile cost estimates from the assigned architect and coordinate peer review estimates when requested by the District. Assist in organizing and, if relevant, segregating bid packages for maximum cost effectiveness for the District. Advise the District regarding owner-supplied equipment and other potential cost-saving measures.
- 3.3. To the extent requested by the District, assist the District in the solicitation and retention of design and engineering consultants, and coordinate design consultants' activities and delivery schedules, as needed. Provide value engineering and life cycle cost analysis.
- 3.4. Provide design-phase services in conjunction with the architecture firms awarded the Project by the District. Work with the Architect to conform and refine designs to correlate designs to budget and Facilities Master Plan, if applicable. Review design documents for constructability, scheduling, consistency, and coordination during schematic and design development phases of work. Perform constructability reviews

at appropriate stages of design. Assist with verification of site conditions. Expedite design reviews, including modifications. Keep accurate documentation of all discussions with users regarding scope and resolution.

- 3.5. Prepare and maintain a Construction Management schedule for the Project. Prepare a procurement plan, where required.
- 3.6. To the extent requested by the District, monitor and report to the District on status of design and state approval in relation to the schedule for the Project. Attend meetings to coordinate design efforts for the Program. Assist in identifying and obtaining all necessary approvals.
- 3.7. To the extent requested by the District, solicit proposals, evaluate, and recommend other professional consultants needed to complete the Project.
- 3.8. Implement District-approved implementation procedures, forms and reporting requirements for the Project that involve all members of the Project team, including the District, design professional(s), and construction Contractor(s).
- 3.9. Work with the Design Team and District to develop the final sizes, choice of materials, services and utilities and other detailed design and performance criteria of the Project.
- 3.10. To the extent requested by the District, provide value engineering at the Schematic Design and/or 100% Design Development Phase. This evaluation will consist of a review of the proposed materials, equipment, systems and other items depicted in the design documents and shall be coordinated with the District's design guidelines and design professional(s). The Construction Manager will prepare a value engineering report documenting the results of the evaluation and make recommendations to the District with respect to alternatives, deletions, or amendments of such proposed items that pertain to the anticipated construction costs, useful life, maintenance and operational costs and efficiencies. The Construction Manager shall provide to the District value engineering recommendations and cost/benefit analysis of those recommendations.

- 3.11. Perform or subcontract for constructability reviews of the Project at the Design Development Phase and at 90% of the Construction Documents Phase. The Project Manager shall review the design documents for clarity, consistency, constructability and coordination. The results of the review shall be provided in writing and as notations on the documents to the District. The Construction Manager shall also make recommendations to the District with respect to constructability, construction cost, sequence of construction, and construction duration
- 3.12. Develop master bid/award schedule(s) including construction milestones for the Project through the completion of construction, as directed by the District, in coordination with design professional(s) and advise and consult with the District. Construction Manager shall review and approve construction Contractor's schedules, but shall not dictate any construction Contractor's means and/or methods of performance.
- 3.13. Establish schedules for any Consultant, and for any hazardous materials or other testing, and review costs, estimates, and invoices of each.
- 3.14. Implement a management control system to support such functions as planning, organizing, scheduling, budgeting, reporting progress, and identifying and documenting problems and solutions for the Project. Prepare monthly progress reports for the District and Program Manager regarding the schedule for the Project.
- 3.15. To the extent requested by the District, organize an initial planning workshop to create baseline parameters for the Project, to define overall building requirements, Project strategy, conceptual budget and schedule. Pursuant to understandings reached at these meetings, Construction Manager will assist Program Manager with developing an implementation plan that identifies the various phases of the Project, coordination among phases, and budget and time constraints for each phase of the Project. The plan will include a detailed strategy, master budget and master schedule as well as identification of critical events and milestone activities.

- 3.16. To the extent requested by the District, provide updated cost estimates for the Project at the Schematic Design, Design Development, and Construction Documents Phases as directed by District or Program Manager; coordinate with design professional(s) and Program Manager and reconcile cost estimates with design professional(s)' estimates.
- 3.17. To the extent requested by the District, advise District regarding "green building" technology and lifecycle costing, when applicable.
- 3.18. Fully coordinate all changes requested by any utility company needed to complete the Project.
- 3.19. To the extent requested by the District, assist in reviewing and tailoring the District's front end documents for the Project. Recommend the number of days required for the construction phase (and any sub-phases, such as hazardous material abatement) and recommend the amount of the liquidated damages.

4. PRE-BID PHASE

- 4.1. Develop master schedules for the Project. Develop budget(s) for the Project based on construction cost estimates.
- 4.2. In consultation with the District and according to District-approved policies, procedures, and standards, implement procedures, forms, and reporting requirements for the Project. Establish, accordingly, a communications procedure for the Project that allows for decision making at appropriate levels of responsibility and accountability.
- 4.3. Work with the design professional(s) to modify or add to standard, special, or general conditions for contract documents that might be needed for unique Project or contract conditions, for the District's approval, and/or assist in the development of documents necessary for the bidding phase.
- 4.4. To the extent requested by the District, make recommendations for development and implementation of procedures to comply with applicable bidding or RFP requirements for the Project as applicable and for expediting

completion of the bidding process for the Project. The scope of the foregoing includes without limitation, recommendations of Construction Manager with respect to: (a) pre-qualification of potential contractors; and (b) alternative construction delivery approaches for the Project, including consideration of a single general contractor and/or Lease Leaseback approach to construction for the Project.

5. BIDDING PHASE

- 5.1. To the extent requested by the District, assist with pre-qualification process for the selection of prime and/or sub-contractors based on the detailed definition of Project scope, budget, schedule, and programming support. Develop a list of pre-qualified prime and sub-contractors, as required.
- 5.2. Assist with developing bidders' interest in the Project. Coordinate all bid phase activities with District departments. Assist with conducting pre-bid conferences to familiarize bidders with the bidding documents, and any special systems, materials or methods and with Project procedures. Conduct job walks and bidders' conferences, maintain and prepare minutes of job walks or bidder's conferences. Field questions from bidders, referring questions to design professional(s) and District as required. Coordinate with design professional(s) to respond to bidder questions by addenda.
- 5.3. Assist with preparation of public solicitation notices for District approval. Review, coordinate, and estimate cost of bid phase addenda.
- 5.4. Assist with review of bid proposals for responsiveness to bid requirements, evaluate bidder responsibility, and conduct reference checks. Prepare bid analyses and advise the District on compliance of bidders with District requirements and bid requirements. Report and recommend to the District after review and evaluation. Make recommendations to the District for prequalification of bidders and award of contracts or rejection of bids.
- 5.5. Assist with conducting post-bid conferences as required. Assist and advise regarding bid protests.

- 5.6. If appropriate, coordinate contracting with Contractor awarded the contract, including evaluating bonds and insurance, and negotiate final terms of construction contractor's contract(s), if applicable.
- 5.7. Assist with conducting pre-award conferences with successful bidders.
- 5.8. Assist with scheduling and conducting preconstruction meetings. Maintain, prepare, and distribute minutes.
- 5.9. Assist with the preparation of agenda items for Board approval. Coordinate submittals required by governing agencies.

6. CONSTRUCTION PHASE

- 6.1. Administer the construction Contract.
- 6.2. Review Contractor's submitted schedules, as needed. Administer and coordinate the work of Contractor on a daily basis. Enforce performance, scheduling, and notice requirements. Review Contractor's schedule submittals and make recommendations to the District.
- 6.3. Monitor schedule and cost information for Contractor. Document the progress and costs of the Project. Report and advise proactively on potential schedule and budget variances and impacts. Recommend potential solutions to schedule and cost problems. Work cooperatively with the District, Architect, and Contractor to ensure that Project is delivered on time and within budget. Review construction progress and prepare reports.
- 6.4. Verify permits, approvals, bonds, insurances, and schedules of values. Coordinate with DSA Project inspector, and ensure compliance with all DSA reporting and closeout requirements. Submit necessary reports to state and local authorities.
- 6.5. Monitor the construction Contractor to verify that tools, equipment, and labor are furnished and work performed and completed within the time required or indicated by the plans and specifications, under the direction and to the satisfaction of the District. The Construction Manager expressly agrees to

verify that the specifications are met, observed, performed, and followed in accordance with the professional standards of care for construction management.

- 6.6. Coordinate work of the construction Contractor and effectively manage the Project to achieve the District's objectives in relation to cost, time and quality.
- 6.7. Provide continuous on-site construction management personnel, as needed. Conduct construction meetings for the Project to discuss and resolve such matters as progress, quality and scheduling. Said meetings shall be weekly unless Project conditions do not require that frequency. Prepare and promptly distribute minutes. When required by field or other conditions, construction progress, or the quality of workmanship, conduct special construction meetings; record, prepare, and distribute minutes of these meetings to the District, the affected construction Contractor, and design professional(s).
- 6.8. Establish and implement team communication procedures.
- 6.9. Ensure that construction Contractor provides construction schedules as required by the construction Contracts, including activity sequences and durations, submittal schedule, or procurement schedule for products that require long lead time. The Construction Manager shall review construction Contractor's construction schedules for conformity with the requirements of the construction Contract and conformity with the overall schedule for the Project. Where construction Contractor's construction schedules do not so conform, the Construction Manager will take appropriate measures to secure compliance, subject to District approval.
- 6.10. Ensure construction Contractor's compliance with the requirements of the respective construction Contract for updating, revising, and other obligations relative to their respective construction schedules.
- 6.11. Cost Control. Construction Manager shall develop and monitor an effective system of construction cost control for the Project. Construction Manager shall identify variances between actual and budgeted or estimated costs and advise District and design

professional(s) whenever a Project cost exceeds budgets or estimates. Construction Manager shall manage the construction bids and contracts in accordance with the Construction Budget.

- 6.12. Continually monitor whether construction contract requirements are being fulfilled and recommend courses of action to the District when Contractor fails to fulfill contractual requirements.
- 6.13. The Construction Manager may authorize minor variations in the work from the requirements of the contract documents that do not involve an adjustment in the contract price or the contract time or design and which are consistent with the overall intent of the contract documents. The Construction Manager shall provide to the design professional(s) and the District copies of these authorizations.
- 6.14. Evaluate and process payment applications and verify progress.
- 6.15. Verify that safety programs are developed and submitted by the construction Contractor as required by the Contract. Neither Construction Manager, Program Manager, nor District shall be responsible for or have any liability for Contractor's failure to provide, comply with, or enforce said safety programs.
- 6.16. Implement quality control program, including As-Built Drawings accuracy. Coordinate and evaluate Contractor's recovery schedules.
- 6.17. Record the progress of the Project by a log.
- 6.18. Monitor ongoing Project costs to verify that projected costs do not exceed approved budget and provide the District timely notice of any potential increase in costs in excess of approved budgets provided to Construction Manager.
- 6.19. Negotiate Contractor's proposals and review change orders prepared by design professional(s), with design professional(s)' input as needed, for approval by the District.

- 6.20. Evaluate and process change order requests. Make recommendations to the District. Determine cost and schedule effects of change orders. Prepare change order reports and maintain a change order log for the Project and implement procedures to expedite processing of change orders.
- 6.21. Assist the District in coordinating the services of special consultants and testing laboratories on the Project.
- 6.22. In conjunction with the design professional(s), monitor work of the construction Contractor to determine that the work is being performed in accordance with the requirements of the respective construction documents for the Project, including but not limited to the plans, specifications, addenda, and all other contract documents, as well as all applicable laws, regulations and directives of agencies with jurisdiction over any of the Project. As appropriate, with assistance of design professional(s), make recommendations to the District and Program Manager regarding special inspection or testing of work that is not in accordance with the provisions of the contract documents.
- 6.23. To guard District against defects in the work of the construction Contractor, the Construction Manager shall implement a quality control program to monitor the quality and workmanship of construction for conformity with:
 - 6.23.1. Accepted industry standards;
 - 6.23.2. Applicable laws, rules, or ordinances; and
 - 6.23.3. The design documents and contract documents.
- 6.24. Where the work of a construction Contractor does not conform as set forth above, the Construction Manager shall, with the input of design professional(s) and Inspector of Record:
 - 6.24.1. Notify the District of any non-conforming work observed by the Construction Manager;
 - 6.24.2. Reject the non-conforming work; and

- 6.24.3. Take any and all action(s) necessary to compel the construction Contractor to correct the work.
- 6.25. Evaluate, track, and maintain logs of requests for information ("RFI") from construction Contractor and responses, shop drawings, samples, and other submittals, based, in part, on information obtained from the design professional(s). Advise District and Program Manager as to status and criticality of RFIs.
- 6.26. Implement procedures, in collaboration with the District and design professional(s), for expediting the processing and approval of shop drawings, product data, samples, and other submittals for each contract. Receive and transmit all submittals from the construction Contractor to the design professional(s) for review and approval. Maintain submittal and shop drawing logs.
- 6.27. Record the progress of work at the Project. When present, prepare daily reports for the Project containing a record of weather, construction Contractor(s) present and their number of workers, work accomplished, problems encountered, and other relevant data.
- 6.28. Prepare and distribute monthly project status reports for the Project including updates on project activities, progress of work, outstanding issues, potential problems, schedule, and status of RFIs, change orders, and submittals.
- 6.29. Coordinate, assist, and support Architect during construction administration phase as required.
- 6.30. This is responsibility of Contractor to maintain this documentation on as-builts. At the completion of the Project, deliver all such records to District. Construction Contractor and design professional(s) share responsibility to prepare Record Drawings and As-Built Drawings.
- 6.31. Coordinate the move into the Project.
- 6.32. Work with District team to develop lists of incomplete or unsatisfactory work ("punch lists").

- 6.33. Fully document and prepare deductive change orders for extra services of consultants that are the responsibility of a Contractor or another consultant. Present such a change order for signature by the Contractor or consultant.
- 6.34. Determine final completion and payment. Determine completion dates, final payments, and release of retention. Coordinate procurement and installation of Furniture, Fixtures, and Equipment ("FF&E").

7. PROJECT COMPLETION

- 7.1. The Construction Manager shall coordinate with District staff, the construction Contractor's check-outs of utilities, operational systems and equipment, and start-up and testing. The Construction Manager shall coordinate the records of start-up and testing as provided by the construction Contractor and shall ensure the District of compliance with applicable provisions of the Contract, that all work has been performed and accepted, and that all systems are complete and operative.
- 7.2. At the punch list phase of the Project or designated portions thereof, the Construction Manager, in consultation with the Architect, shall ensure the preparation of a list of incomplete or unsatisfactory work or work which does not conform to the requirements of the contract documents ("punch list work") and a schedule for the completion of the punch list work. The Construction Manager shall provide this list to the construction Contractor. The Construction Manager shall coordinate construction Contractor's performance and completion of punch list work. The Construction Manager shall review, with the Architect and District, the completed punch list work. The Construction Manager shall ensure, with input of the Architect, that the completed punch list work complies with applicable provisions of the construction Contract.
- 7.3. The Construction Manager shall determine, with the Architect and District, when the Project or designated portions thereof are complete.
- 7.4. The Construction Manager shall conduct, with the Architect and District, final inspections of the Project or designated portions

thereof. The Construction Manager shall notify the District of final completion.

- 7.5. The Construction Manager shall consult with the Architect and District and shall determine when the Project and the construction Contractor's work are finally completed. The Construction Manager shall assist with the issuance of a Certificate of Final Completion, and shall provide to the District a written recommendation regarding payment to the Contractor.
- 7.6. The Construction Manager shall coordinate close-out procedures, including personnel training. Advise District staff on systems operations, training and close-out of Projects.
- 7.7. The Construction Manager shall coordinate and expedite Contractor close-out requirements, including guarantees/warranties, certificates, keys, manuals, As-Built Drawings, Record Drawings, specifications, daily logs, and verified reports. Ensure that all other project participants submit necessary close-out documentation.
- 7.8. The Construction Manager shall coordinate operational safety reviews with District post occupancy and manage corrective work as necessary.
- 7.9. The Construction Manager shall ensure that all building commissioning requirements have been fulfilled in a timely manner through District commissioning agents.
- 7.10. The Construction Manager shall obtain occupancy permits (where required), coordinate final testing, documentation, and regulatory inspections. Prepare occupancy plan report.
- 7.11. The Construction Manager shall prepare final accounting reports.

8. FINAL DOCUMENTS

The Construction Manager, in conjunction with the Design Team, shall review and monitor all As-Built Drawings, maintenance and operations manuals, and other closeout documents to be sure that all required documents meeting contract requirements are provided, and

shall secure and transmit to the District and Program Manager those documents and all required guarantees, keys, manuals, record drawings, and daily logs. The Construction Manager shall also forward all documents and plans to the District upon completion of the project and ensure all such plans and documents are well organized for any appropriate audit or review of the Project.

9. WARRANTY

The Construction Manager shall assist Program Manager as necessary to implement a Warranty Inspection and Warranty Work procedure for the Project that Contractor must follow. The procedure shall include a twelve (12) month call back period and a final warranty inspection eleven (11) months after Project completion to inspect the Project and identify any outstanding warranty work.

10. PROJECT CLOSEOUT

To the extent requested by District, the Construction Manager shall assist District, Architect, and Inspector of Record, as necessary, to ensure all information and documentation necessary for Project closeout with the DSA is complete and the Project is timely closed out with DSA. This includes but is not limited to reports from independent consultants, inspectors, testing laboratories, and corresponding or required DSA forms.

[END OF EXHIBIT]

PROJECT AUTHORIZATION NO. 1
TO AGREEMENT FOR CONSTRUCTION MANAGEMENT SERVICES

This Project Authorization No. 1 ("Project Authorization") is an addendum supplemental to the Agreement for Construction Management Services by and between the Davis Joint Unified High School District and Innovative Construction Services, Inc. ("Agreement"), and is entered into by and between the Davis Joint Unified High School District ("District") and Innovative Construction Services, Inc. ("Construction Manager," and together with the District, "Parties"), as follows:

RECITALS

WHEREAS, the Parties entered into the Agreement effective as of September 3, 2020 for the provision of construction management services in connection with the District's Measure M capital facilities improvements ("Program");

WHEREAS, the Agreement provides that the Parties may execute this Project Authorization to authorize Construction Manager's work on certain Project(s) under the Program, as identified herein; and

WHEREAS, the Parties wish to supplement the Agreement to assign Construction Manager the Project(s) and accompanying terms, including but not limited to scope and payment, contained herein.

NOW THEREFORE, in consideration of the mutual promises and covenants set forth above and contained herein, the Parties hereby agree as follows:

AGREEMENT

1. **Effect:** This Project Authorization is entered into pursuant to the Agreement, and, when fully executed, is considered as an integral part of said Agreement subject to all the provisions and conditions thereof.
2. **Project:** The District does hereby authorize Construction Manager to provide professional services on the following project:

**Science Lab Buildings at Emerson Junior High School
located at: 2121 Calaveras Avenue, Davis, CA 95616**

The scope of work will include the provision of professional construction management services in connection with the Project.

3. **Services:** Services include those set forth in **Schedule A**, which is attached hereto and incorporated herein by this reference.

EXHIBITS

**Agreement for Construction Management Services – Emerson Science Labs
Davis Joint Unified High School District**

DWK DMS 3521792v1

4. **Construction Cost Budget and Construction Budget:**

- 4.1. The Construction Budget, as defined in the Agreement, for the Project is Six Million, Four Hundred Thirty Three Thousand, Three Hundred Six Dollars (\$6,433,306).
5. **Fee:** The District shall pay Construction Manager for all Services pursuant to this Project Authorization an amount equal to the following ("Fee") an amount not exceed One Hundred Forty Six Thousand, One Hundred Sixty Dollars (\$146,160 Dollars) based on the hourly rates and reimbursable expenses set forth in **Exhibit "C"** to the Agreement. The District shall pay Construction Manager the Fee consistent with the provisions of **Exhibit "C."**
6. **Extra Services:** To be performed and billed in accordance with Exhibit "B" to the Agreement.
7. **Staffing:** Services shall be provided by the key personnel identified in the Agreement, unless otherwise identified below:
 - Project Executive: Eric Hartwell
 - Project Director: Dave Fukui
 - Senior Project Manager: Meredith Collins
 - Project Manager: Rick Hureaux and Paul Borcharding
 - Project Engineer: Stacy Gerdin
8. **Schedule:** Construction Manager shall commence the work under this Project Authorization upon receipt of a Notice to Proceed. Construction Manager shall diligently prosecute the Services as described in **Schedule A**, and in accordance with the schedule attached as **Schedule C**. Time is of the essence and failure of Construction Manager to perform work on time as specified in this Project Authorization is a material breach of the Agreement.
9. **Provisions of Agreement and Exhibits Reaffirmed:** All other provisions of and Exhibits to the Agreement shall remain in full force and effect and are reaffirmed. If there is any conflict between this Project Authorization, including the Schedules attached hereto, and any provision of the Agreement relating to this Project Authorization only, the provisions of this Project Authorization, including the Schedules attached hereto, shall control.

IN WITNESS WHEREOF, the Parties hereto have accepted and agreed to this Project Authorization on the dates indicated below.

Dated: September 3, 2020

Dated: August 26, 2020

Davis Joint Unified High School District

Innovative Construction Services, In.

By: _____

By:  _____

Print Name: Matt Best

Print Name: Meredith Collins

Print Title: Deputy Superintendent

Print Title: CFO/Program Manager

SCHEDULE A TO PROJECT AUTHORIZATION NO. 1

Schedule of Work

Construction Management work will begin on August 1, 2020 and continue through June 1, 2021.

[END OF SCHEDULE]

EXHIBIT "B"

CRITERIA AND BILLING FOR EXTRA SERVICES

The following Extra Services to this Agreement shall be performed by Construction Manager if needed and requested by District or Program Manager:

1. Providing services required because of significant documented changes in the Project initiated by the District, including but not limited to size, quality, complexity, or the District's schedule.
2. Providing consultation concerning replacement of work damaged by fire or other cause during construction and furnishing services required in connection with replacement of such work.
3. Providing services made necessary by the default of Contractor, or by major defects or deficiencies in the work of the Contractor, or by failure of performance of the District's consultants.
4. Seeking variances or changes to agency guidelines on behalf of the District when so directed by the District.
5. Preparing to serve or serving as a witness in connection with any public hearing, dispute resolution proceeding or legal proceeding, other than that necessitated by the negligent acts, errors or omissions of Construction Manager or where the Construction Manager is a party thereto, except for a Contractor's hearing necessitated by a bid protest or by a Contractor's request to substitute a subcontractor, or by handling of any stop payment notices.
6. Performing technical inspection and testing.
7. Providing other services not otherwise included in this Agreement and not customarily furnished in accordance with the generally accepted scope of construction management practice.
8. The mark-up on any approved reimbursable item of Extra Services shall not exceed five percent (5%).
9. Format and Content of Invoices (Extra Services Only):

Construction Manager acknowledges that the District requires Construction Manager's invoices to include detailed explanations of the

Extra Services performed. For example, a six hour charge for "RFIs and CORs" is unacceptable and will not be payable. A more detailed explanation, with specificity, is required. This includes a separate entry for each RFI, PCO, CCD and change order. For example, the following descriptions, in addition to complying with all other terms of this Agreement, would be payable. The times indicated below are just placeholders:

Review RFI 23; review plans and specifications for response to same; prepare responses to same and forward to contractor, district, construction manager, and project inspector.	0.8 hours
Review COR 8; review scope of same and plans and specifications for appropriateness of same; prepare draft change order and language for same.	0.7 hours
Review COR 11; review scope of same and plans and specifications for appropriateness of same; prepare rejection of COR 11 for review by district, CM, IOR.	1.2 hours

[END OF EXHIBIT]

EXHIBIT "C"

FEE SCHEDULE

Compensation

1. The Construction Manager's fee set forth in this Agreement shall be full compensation for all of Construction Manager's Services incurred in its performance, including, without limitation, all costs for personnel, travel within two hundred (200) miles of the Project location (travel reimbursements must be approved by District prior to travel), offices, per diem expenses, office supplies, printing, providing, or shipping of deliverables in the quantities set forth in **Exhibit "A."** Except as expressly set forth in the Agreement and **Exhibit "B,"** there shall be no payment for extra costs or expenses.
2. The amount of compensation shall be the amount set forth in the Agreement, including all billed expenses. No compensation will be paid or due, without advance written approval of the District.

Construction Management Services:

August, 2020	\$7,520
September, 2020	\$11,040
October, 2020	\$19,680
November, 2020	\$19,680
December, 2020	\$19,680
January, 2021	\$19,680
February, 2021	\$20,320
March, 2021	\$11,520
April, 2021	\$9,520
May, 2021	\$7,520
Total Fee:	\$146,160

Method of Payment of Basic Services

1. Construction Manager shall submit monthly invoices on a form and in the format approved by the District.
2. Construction Manager shall submit to District on a monthly basis documentation showing proof the payments were made to Construction Manager's Consultants, sub-consultants, and/or subcontractors.

3. Upon receipt and approval of Construction Manager's invoices, except as provided in subdivision 5 herein, the District agrees to make payments of undisputed amounts within sixty (60) days of receipt of the invoice as follows:
4. If Construction Manager fails to timely and completely perform its obligations under this Agreement, the District may withhold or deduct the amounts that would be due therefor from amounts otherwise due Construction Manager hereunder with the amounts withheld or deducted being released after Construction Manager has fully cured such failure of performance, less costs, damages or losses sustained by the District resulting therefrom.

[END OF EXHIBIT]

EXHIBIT "D"

**CRIMINAL BACKGROUND INVESTIGATION/FINGERPRINTING
CERTIFICATION**

PROJECT/CONTRACT NO.: 1 between the Davis Joint Unified High School District ("District") and Innovative Construction Services, Inc. ("Construction Manager") for the Science Labs at Emerson Junior High School Project ("Contract" or "Project").

The undersigned does hereby certify to the governing board of the District as follows:

That I am a representative of the Construction Manager currently under contract with the District; that I am familiar with the facts herein certified; and that I am authorized and qualified to execute this certificate on behalf of Construction Manager.

Construction Manager certifies that it has taken at least one of the following actions with respect to the construction Project that is the subject of the Contract (check all that apply):

- ☒ The Construction Manager is a sole proprietor and intends to comply with the fingerprinting requirements of Education Code section 45125.1(k) with respect to all Construction Manager's employees who may have contact with District pupils in the course of providing services pursuant to the Contract, and hereby agrees to the District's preparation and submission of fingerprints such that the California Department of Justice may determine that none of those employees has been convicted of a felony, as that term is defined in Education Code section 45122.1. No work shall commence until such determination by DOJ has been made.

As an authorized District official, I am familiar with the facts herein certified, and am authorized to execute this certificate on behalf of the District and undertake to prepare and submit Construction Manager's fingerprints as if he or she was an employee of the District.

Date: September 3, 2020

District Representative's Name and Title: Matt Best, Deputy Superintendent

District Representative's Signature: _____