

Mayor's Office of Housing and Community Development
City and County of San Francisco



**Fee Proposal Guidelines for
Architect and Engineering Basic Services**

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I. Determination of Scope of Work

The Architect and Consulting Engineers will determine the full scope of work for the project with meeting(s) with Owner, site visits, review of available documents and information. The Architect will submit a fee proposal for services to determine the full scope of work and if the fee proposal is agreed upon by the Owner, both parties will enter into a Memorandum of Understanding for Limited Services between the Owner and the Architect for these services. After the full scope of work is determined to be satisfactory to the Owner and MOHCD, the Architect and Consulting Engineers will submit an AIA B101 – 2007 Standard Form of Agreement between Owner and Architect that will include the Basic Services described below.

II. Basic Services – All Projects

In addition to the Architect's Basic Services defined in AIA B101 – 2007 Standard Form of Agreement between Owner and Architect, Basic Services for affordable housing projects financed by the Mayor's Office of Housing and Community Development (MOHCD) shall include the following:

A. General:

- Architect to be responsible for documenting all meetings and the decisions made.

B. Conceptual Design Phase:

- Preliminary meeting(s) with Owner.
- Other pre-schematic design meetings and minutes.
- If applicable, up to 3 basic conceptual "bubble-diagram" designs.
- Services rendered by Architect and Consulting Engineers prior to execution of the Agreement with Architect

C. Schematic Design Phase:

- Architectural programming.
- Site Evaluation and Site Planning.
- Multiple preliminary schematic designs.
- Up to 3 community meetings and/or public hearings including preparation time, but not including unlimited graphic-model materials.
- Pre-application meetings and interface with other relevant City Agencies – up to 2 pre-application meetings with each agency such as the Department of Building Inspection, San Francisco Fire Department, City Planning, Mayor's Office on Disability (MOD) and if applicable, Department of Parking and Traffic.
- Submission of drawings to MOHCD for review and comments.
- Provide cost containment services as needed for conformance to the Project's Construction Budget (Cost of the Work). Detailed Cost Estimates to be provided by General Contractor or others.
- Narrative or graphic responses to MOHCD comments on submitted drawings.
- If applicable, documents and attendance at hearings for compliance to City Planning Department's requirements for variance, conditional use, etc.

D. Design Development Phase:

- Limited Furniture, Fixtures & Equipment (FF&E) layouts for accessible units and common areas to ensure that accessible areas can be furnished in a manner acceptable to MOD and for assembly areas, proper exiting acceptable to SFDBI and SFFD.
- Submission of drawings to MOHCD for review and comments.
- Provide cost containment services as needed for conformance to the Project's Construction Budget (Cost of the Work). Detailed Cost Estimates to be provided by General Contractor or others.
- Narrative or graphic responses to MOHCD comments on submitted drawings.

E. Construction Document Phase:

- Submission of drawings to MOHCD for review and comments.
- Provide cost containment services as needed for conformance to the Project's Construction Budget (Cost of the Work). Detailed Cost Estimates to be provided by General Contractor or others.
- Narrative or graphic responses to MOHCD comments on submitted drawings.
- Submission of Construction Documents to MOD for review.
- Written responses to MOD comments. Numerous separate written responses will be required.
- Construction Document review and sign-off meeting with MOD.
- With review and approval by MOD, develop Reasonable Accommodation Notice to notify tenants of their right to changes in their unit to accommodate their disability.
- Providing for alternative bids that do not require material design changes in the construction documents.

F. Bidding and Negotiation Phase:

- Post-bidding value engineering revisions corresponding to up to 10% of the pre-bid construction budget.

G. Construction Administration Phase:

- Conformed Construction Documents.
- Pre-Construction meeting minutes and review of contractor-prepared meeting minutes during construction.
- Construction meeting minutes, typically weekly meetings for entire construction period duration including punchlist.
- Redesign and contract document revisions that are related to "reasonable and foreseeable" code interpretations by a field inspector. What is "reasonable and foreseeable" may be defined by a third party if necessary.

- Ongoing review of contractor-prepared record (as-built) drawings at least monthly throughout the course of construction or at time intervals appropriate to the project.
- Preparing reasonable and routine Change Orders.
- Evaluating substitutions proposed by the Owner or Contractor and making subsequent non-material revisions to the construction documents.
- Redesign costs associated with architect-driven change orders only.
- Project walk-thru for punch list shall be based upon 100% walk-through of all residential units, common areas and exterior site conditions. Create punch list and sign-off on contractor completion of punch list items.
- Other project close out documentation including but not limited to Date of Substantial Completion form, assistance in obtaining Certificate of Final Completion from San Francisco Department of Building Inspection, assistance in obtaining compilation of warranties, equipment and building systems' operation manuals from the General Contractor, etc.

H. Post Project Completion:

- Written Post-Occupancy Building and Social Evaluations including 9-Month and 12-Month, walk-throughs with Owner, Contractor, and sub-consultants as needed to identify issues. These would also serve as warranty walk-throughs.

III. Basic Services – New Construction Projects

In addition to the Basic Services for All Projects listed above, Basic Services for New Construction projects shall also include:

- Civil Engineering as included as basic services and services associated for compliance to the latest edition of California Green Building Code.
- If applicable, Mechanical Engineering services related to Department of Public Health's Article 38 for enhanced ventilation.
- If applicable, services related to Department of Public Health's Maher Ordinance Program.
- If applicable, Mechanical Engineering services related to San Francisco's Recycled Water Ordinance.

- If applicable, general automatic fire sprinkler system information showing points of connection, location of fire pump, backflow preventer and main vertical and horizontal lines to coordinate the inclusion of furred walls, dropped ceilings/soffits, etc. in the construction documents.
- If applicable, Landscape Architect basic services.
- If applicable, Street Improvement Permit Drawings and/or Sidewalk Encroachment Drawings as required by Department of Public Works' Bureau of Street-Use and Mapping.
- Acoustic Engineer basic services.
- Elevator Consultant basic services.
- Waterproofing consultant.
- Title 24 Energy consultant for building envelope.
- Title 24 energy conservation compliance.
- Telecommunications/Data design.
- During the Construction Administration Phase, weekly construction job site meetings unless Owner and General Contractor agree otherwise.
- If applicable, coordinate with Owner's Security Consultant for documentation required to be incorporated in the construction documents.

IV. Basic Services - Rehabilitation Projects

In addition to the Basic Services for All Projects listed above, Basic Services for rehabilitation projects shall also include:

- Confirmation/verification of as-built documentation of existing conditions provided by Owner.
- Path-of-travel analysis, including the nearest transit stop.
- Recommendations for exploratory demolition and/or systems testing to be done by owner during schematic design phase to verify assumptions.
- Observation time as required during construction to address uncovered existing conditions.

- Final scope of work shall be based upon 100% walk-through of all residential units, common areas and exterior site conditions.
- If applicable, planning, phasing and coordination during an occupied rehabilitation project.
- Civil Engineering as included as basic services and services associated for compliance to the latest edition of California Green Building Code.
- If applicable, Mechanical Engineering services related to Department of Public Health's Article 38 for enhanced ventilation.
- If applicable, services related to Department of Public Health's Maher Ordinance Program.
- If applicable, Mechanical Engineering services related to San Francisco's Recycled Water Ordinance.
- If applicable, general automatic fire sprinkler system information showing points of connection, location of fire pump, backflow preventer and main vertical and horizontal lines to coordinate the inclusion of furred walls, dropped ceilings/soffits, etc. in the construction documents.
- If applicable, Title 24 Energy consultant for building envelope.
- If applicable, Title 24 energy conservation compliance.
- If applicable, Acoustic Engineer basic services.
- If applicable, Landscape Architect basic services.
- If applicable, Street Improvement Permit Drawings and/or Sidewalk Encroachment Drawings as required by Department of Public Works' Bureau of Street-Use and Mapping.
- If applicable, Elevator Consultant basic services.
- If applicable, Telecommunications/Data design.
- If applicable, Waterproofing consultant.
- If applicable, Forensic Building consultant.
- If applicable, coordinate with Owner's Security Consultant for documentation required to be incorporated in the construction documents.

V. Basic Services Exclusions

The following are to be considered outside the scope of Basic Services for affordable housing projects financed by MOHCD:

- Detailed Cost Estimating.
- Detailed Fire Protection Permit Drawings and Hydraulic Calculations for Automatic Fire Sprinkler System.
- Detailed Fire Alarm System Permit Drawings.
- LEED certification
- Specialized Structural Evaluations (Non-Linear Analysis)
- Testing agency services
- Geotechnical Engineering services.
- Building Information Modeling
- Historic Preservation
- Furniture, Furnishings and Equipment Design
- Post-bidding value engineering revisions made necessary by delays beyond the control of the Architect or by inflation deemed by both parties to be standard in the industry at the time.

VI. Fees for Basic Services

The architectural and engineering fee for Basic Services shall be based **upon the scope of work** and not based on a percentage of construction cost. The Architect and Consulting Engineers shall evaluate the scope of work and determine the required labor/materials and/or hours based on the firms' hourly rates. The Architectural and Engineering Fees shall provide the following information:

- Cost breakdown for architectural and consultant engineering fees for each of the phases mentioned above.
- A summary showing each firms' (architectural and consultant engineering) total fees.
- Architect and consultant engineers' hourly rates.

- Reimbursables budget and cost breakdown. (Reimbursables will have a maximum multiplier of one and one-tenth (1.1) times the direct vendor cost.)
- Itemized specific exclusions from the Basic Services.

VII. Fees for Additional Services

The architectural and engineering fee for Additional Services shall be based upon the Owner's written request for additional and/or expanded work that is not included in the Basic Services. The Architect and Consulting Engineers shall evaluate the additional and/or expanded work to determine the required labor/materials and/or hours based on the firms' hourly rates. The Architectural and Engineering Fees shall provide the following information:

- Cost breakdown for architectural and consultant engineering fees.
- Architect and consultant engineers' hourly rates.
- Reimbursables budget and cost breakdown. (Reimbursables will have a maximum multiplier of one and one-tenth (1.1) times the direct vendor cost.)

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