

Attachment A: Tasks

The Consultant shall provide the services and deliverables set forth in this **Attachment A**. The Consultant shall provide all services and deliverables required by this **Attachment A** to the satisfaction of the City's contract manager.

General Description of Project for which Consultant will Provide Services: CONSULTANT to prepare a Historic Structure Report (HSR) for a barn structure located within the Metzger Ranch Complex at the intersection of San Felipe Road and Meadowlands Lane.

The Metzger Ranch Complex is Designated Historic City Landmark No. 43. The existing barn is approximately 40' x 40' and is estimated to have been built between 1850-1913. The barn is severely dilapidated in its current state with significant structural damage at the walls and roof.

CONSULTANT to prepare an HSR, which will document the barn's historic features, include descriptions of its current condition, analyze its historic integrity, and provide recommendations for mitigation.

Task No. 1: Project Management

A. Services:

1. The CONSULTANT shall provide project management, which includes:
 - a. Coordination with the City of San José Parks, Recreation, and Neighborhood Services Department (CITY)
 - b. Project setup (upon receipt of Notice to Proceed ("NTP"))
 - c. Budget tracking/invoicing
 - d. Project scheduling
 - e. Senior review of documents
 - f. Delivery of products outlined in this scope of work
2. The CONSULTANT shall arrange and attend a minimum of three (3) project development coordination meetings, including a kick-off meeting and progress meetings. Meetings shall be conducted virtually, unless in-person meetings are deemed necessary. CONSULTANT shall prepare minutes of the meetings for the review and approval of the CITY and distribute the minutes via email to all meeting participants.

B. Deliverable:

1. 8.5x11 PDF of meeting minutes emailed to CITY for initial review.
2. Project Schedule in PDF format emailed to CITY for initial review within three (3) calendar days from NTP.

C. **Completion Time:** The CONSULTANT must complete the services and deliverables for this task in accordance with whichever one of the following time is marked:

- On or before the following date: **Throughout the term of the Project.**
- On or before ____ Business Days from _____.

Task No. 2: Historic Structure Report (“HSR”)

A. Services:

1. CONSULTANT shall prepare an HSR for the Metzger Ranch Complex barn and conduct the services as outlined below:
 - a. Conduct research to complete the historical background and context and chronology of the Metzger Ranch Barn development.
 - b. Conduct an existing conditions survey and prepare the physical description and integrity assessment in the HSR.
 - c. Prepare treatment recommendations with proposed parameters for maintenance requirements and repair work procedures that would adhere to the Secretary of the Interior’s Standards for Rehabilitation.
 - d. Provide mitigation recommendations in the case of demolition.
2. CONSULTANT shall review existing documents related to the historic status of the barn and shall conduct additional archival research, including online research and in-person research, if necessary, to discover additional information on the resource, including review of historic aerial maps and topographic maps, tax assessor information, and other sources to determine the construction development and associated dates of the built environment on the property.
3. CONSULTANT shall conduct a survey of the property, photograph the barn and record it on appropriate California Department of Parks and Recreation (DPR) 523 forms.

The HSR and DPR 523 forms will be reviewed for quality assurance following the CONSULTANT’s quality assurance/quality control procedures prior to transmittal to the CITY.

B. Deliverable:

1. The Historic Structure Report in 8.5x11 PDF format which includes:
 - a. an introduction
 - b. brief history of the property
 - c. construction history
 - d. architectural evaluation
 - e. existing conditions
 - f. treatment and mitigation recommendations
 - g. guidance for proposed treatment and demolition
 - h. drawings and photographs
 - i. references
2. Electronic copy of the DPR 523 forms in 8.5x11 PDF format which includes:
 - a. physical description of the barn
 - b. chronology of construction and alterations on the property
 - c. historical themes and contexts
 - d. integrity assessment
 - e. list of the character-defining features of the historical resource

- C. Completion Time:** The CONSULTANT must complete the services and deliverables for this task in accordance with whichever one of the following time is marked:

- On or before the following date: _____.
- On or before **60** Calendar Days from **“Notice to Proceed.”**

Task No. 3: California Environmental Quality Act (“CEQA”) Impacts Assessment Memorandum

- A. Services:** CONSULTANT will prepare an impact assessment of the rehabilitation and/or demolition of the historical resource following the applicable impact threshold of CEQA. The impact threshold for historical resources is whether the project may cause a substantial adverse change in the significance of a historical resource. Substantial adverse change could be physical demolition, destruction, relocation, or alteration of the resource or its immediate surroundings such that the significance of an historical resource would be materially impaired. CONSULTANT will identify the project activities that may impact the resource, particularly activities that may cause a substantial adverse change. CONSULTANT will analyze the potential for significant impacts resulting either from one rehabilitation treatment alternative and one demolition treatment alternative, and document the findings in an addendum to the HSR. There shall be one round of review and comment by the CITY prior to finalizing the addendum.

B. Deliverable:

1. 8.5x11 PDF of Draft CEQA Impacts Assessment as an addendum to the HSR emailed to CITY for review and comment.
2. Final Impacts Assessment addendum in 8.5x11 PDF format emailed to CITY.

- C. Completion Time:** The CONSULTANT must complete the services and deliverables for this task in accordance with whichever one of the following time is marked:

- On or before the following date: _____.
- On or before **30** Calendar Days from **the completion of Task No. 2.**

Attachment B: Terms and Conditions

1. **City's Contract Manager:** The City's contract manager for this Approved Service Order is:

Name: Rosa Kim	Phone No.: (408) 535-5689
Department: Public Works	Email: rosa.kim@sanjoseca.gov
Address: 200 E Santa Clara St., 6 th Floor., San Jose, CA 95113	

2. **Consultant's Contract Manager and Other Staffing:** Identified below are the following: (a) the Consultant's contract manager for this Approved Service Order, and (b) the Consultant(s) and/or employee(s) of the Consultant who will be principally responsible for providing the services and deliverables. ***If an individual identified below does not have a current Form 700 on file with the City Clerk for a separate agreement with the City, and is required to file a Form 700, the Consultant must comply with the requirements of Subsection 17.2 of the Master Agreement, entitled "Filing Form 700."***

		<u>Required to File Form 700?</u>		
		Yes Already Filed (Date Filed)	Yes Need to File	No
<u>Consultant's Contract Manager</u>				
Name: Rod Jeung	Phone No.: (415) 547-2598			X
Address: 150 California St, Suite 200, San Francisco, CA 94111	Email: rod.jeung@aecom.com			
<u>Other Staffing</u>				
<u>Name:</u>	<u>Assignment:</u>	<u>Email:</u>		
1. Trina Meiser	Senior Historian	Trina.Meiser@aecom.com		X
2. Evan Mackall	Historian	Evan.Mackall@aecom.com		X
3.				
4.				

3. Subconsultants: Whichever of the following is marked applies to this Approved Service Order:

- The Consultant can **not** use any subconsultants.
- The Consultant can use the following subconsultants to assist in providing the required services and deliverables:

<u>Subconsultant's Name</u>	<u>Area of Work</u>
1.	
2.	
3.	

4. Reimbursable Expenses: If the Compensation Table set forth in **Attachment C** of this Approved Service Order states that the City will reimburse the Consultant for expenses, then only the expenses identified in Subsection 10.5.3 of the Master Agreement are Reimbursable Expenses unless the following box is marked and additional reimbursable expenses are set forth:

- In addition to the expenses identified in Subsection 10.5.3 of the Master Agreement, the following expenses are Reimbursable Expenses:

<u>Additional Reimbursable Expense(s)</u>	<u>Mark-up</u>
1. _____	_____
2. _____	_____
3. _____	_____

Notwithstanding the foregoing, any additional reimbursable expense(s) set forth in the above table will be disregarded if the Compensation Table states that the City will *not* reimburse the Consultant for any expenses.

Attachment C: Compensation Table

The City will compensate the Consultant for providing the services and deliverables set forth in **Attachment A** in accordance this Compensation Table. This Compensation Table is subject to the terms and conditions set forth in the Master Agreement, including without limitation Section 10 of the Master Agreement.

Part 1 – Compensation for Services and Deliverables						
Column 1	Column 2		Column 3			Column 4
Task Nos. from Attachment A	Basis of Compensation		Invoice Period			Compensation
1	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 1,890
2	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 15,175
3	<input type="checkbox"/> Time & Materials	<input checked="" type="checkbox"/> Fixed Fee	<input type="checkbox"/> Monthly	<input checked="" type="checkbox"/> Completion of Task(s)	<input type="checkbox"/> Completion of Work	\$ 5,100
Part 2 – Reimbursable Expenses						
<input checked="" type="checkbox"/> No expenses are separately reimbursable. The amount(s) in Column 4 of Part 1 include(s) payment for all expenses.			<input type="checkbox"/> Expenses are separately reimbursable in the maximum amount of:			\$ 0
Part 3 – Subconsultant Costs						
<input checked="" type="checkbox"/> Subconsultant costs are <i>not</i> separately compensable. The amount(s) in Column 4 of Part 1 include(s) subconsultant costs.			<input type="checkbox"/> Subconsultant costs are separately compensable in the maximum amount of:			\$ 0
Maximum Service Order Compensation (sum of Parts 1 through 3):						\$ 22,165

PUBLIC WORKS - DIRECTOR'S OFFICE TRANSMITTAL

After Division Manager approves, forward transmittal and documents to the "Submit To" person specified on the Public Works Approval Matrix. The matrix can be found on the PW intranet web page.

Name	Your Location & Division	Phone No.
Prepared by: Rosa Kim	City Hall 6th Floor, CFAS	(408) 535-5689

Subject or Proj ID/Name 10200 - Metzger Ranch Barn Historic Structure Report; Service Order #9

City Attorney *(for signature)*

Deliver to:
 City Attorney _____ Matter # _____ Approved _____ Date _____
 (if applicable, otherwise check appropriate box below)

Council Memo Council Date _____ Date Due to Director's Office _____

Draft reviewed by: <i>(provide name)</i> <input type="checkbox"/> Attorney _____ <input type="checkbox"/> Budget Office _____ <input type="checkbox"/> Client Dept(s) _____ Attachments: <input type="checkbox"/> Memo <input type="checkbox"/> Map <input type="checkbox"/> CEQA Clearance <input type="checkbox"/> Budget Worksheets <input type="checkbox"/> Other _____	To be completed by Council Liaison: Approved: _____ Approved: _____ Approved: _____
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Correspondence

Info Memo

Committee Memo
 Committee _____
 Committee Date _____
 Date Due to CMO _____

Director Award Memo

Memo

Letter

Travel Request or Statement

Reviewed by Travel Coordinator :

 Initials Date

CMO Transmittal

Other _____

Contracts & Agreements

Council Award

Construction Contract \$1,000,000

Consultant Agreement >\$290,000

Amendment # _____

Utility >\$100,000

Manager Award

Construction Contract >\$1,000,000

Consultant Agreement ≤\$320,000

Amendment # _____

Parkland Agreement

Director Award

Director Award, Minor <\$100,000

Director Award, Major <\$1,000,000

Construction Contract ≤\$1,000,000

Parkland Agreement

Utility Agreement ≤\$100,000

Other _____

Change Orders / Service Orders

Council Approval

Original contract ≤ \$100,000; single CCO >\$10,000




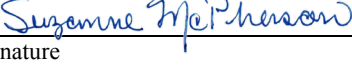
Original contract > \$100,000; single CCO >\$100,000

Sum of all CCOs exceed contingency amount:
 Contingency \$ _____
 Total CCOs \$ _____

Director Approval

CCO >\$20,000 & ≤ \$100,000

SO > \$20,000 & ≤ Agrmt amount

SECTION MANAGER/ SUPERVISOR:		Lili Etessam	Date <u>8/9/2022</u>
	Signature	Print name here	
DIVISION ANALYST (if applicable)		David Vuong	Date <u>8/11/2022</u>
	Signature	Print name here	
DIVISION MANAGER		Huimin Mu	Date <u>8/15/2022</u>
	Signature	Print name here	
ADMINISTRATION		Suzanne McPherson	Date <u>08/16/2022</u>
	Signature	Print name here	
DEPUTY DIRECTOR	N/A		Date _____
	Signature	Print name here	
ASSISTANT DIRECTOR			Date _____
	Signature	Print name here	

Comments:



- FOR YOUR ELECTRONIC SIGNATURE
- FULLY EXECUTED COPY TO FOLLOW


CITY STAFF: Rosa Kim
STAFF EMAIL: Rosa.kim@sanjoseca.gov

SCANNED SIGNATURE AUTHORIZATION

DATE: 8/9/2022 TOTAL PAGES: (INCLUDING THIS PAGE) 8

CONSULTANT NAME: Rod Jeung (AECOM Technical Services, Inc.)
EMAIL: Rod.jeung@aecom.com
PHONE: 415-547-2598

I agree to use electronic signatures

SIGNATURE OF CONSULTANT: 

DIRECTIONS:

REVIEW THE ENCLOSED DOCUMENT, IF IT IS ACCEPTABLE:

1. SIGN THE DOCUMENT
2. CHECK THE BOX BELOW YOUR NAME AND SIGN AGREEING TO THE USE OF ELECTRONIC SIGNATURES
3. SCAN YOUR EXECUTED DOCUMENT TOGETHER WITH THIS COVER PAGE **IN BLUE INK**
4. EMAIL THE ENTIRE DOCUMENT TO (CITY STAFF EMAIL ADDRESS):

TO BE COMPLETED BY CITY STAFF:

ALTERNATIVE METHODS OF VERIFICATION:

- USE OF A PASSWORD PROTECTED WEBSITE
- CONFIRMED BY A KNOWN TELEPHONE NUMBER / EMAIL
- PERSONALLY KNOWN TO CITY STAFF

City of San José Contract/Agreement Transmittal Form

Route Order

Attached / Completed

Electronically Signed

TO: City Attorney
 City Manager
 City Clerk OR Return to
Dept. (circle one)

Insurance Certificates / Waivers Electronically Signed: Yes
 Business Tax Certificate Audit Trail Attached (if applicable)
 Contacted Clerk re: Form 700 Scanned Signature Authorization
 Supplemental Memorandums (if applicable): Select One

Type of Document: Service Order

Type of Contract: Consulting Services

REQUIRED INFORMATION FOR ALL CONTRACTS:

Existing **GILES #** 665282 -011

Contractor: AECOM Technical Services, Inc.

Address: 150 California Street, Suite 200, San Francisco, CA 94111

Phone: 415-547-2598

Email: rod.jeung@aecom.com

Contract Description: Service Order #9: 10200 - Metzger Ranch Barn Historic Structure Report

Term Start Date: 1/21/2020 Term End Date: 12/31/2024 Extension: Select one

Method of Procurement: Select one RFB, RFP or RFQ No.: _____ Date Conducted: _____

Agenda Date (if applicable): _____

Agenda Item No.: _____

Resolution No.: _____

Ordinance No.: _____

Original Contract Amount: \$1,000,000

Amount of Increase/Decrease: _____

Option #: ___ of ___ Option Amount: _____

NTE/Updated Contract Amount: _____

Fund/Appropriation: 390/4192

Form 700 Required (Selection mandatory for processing): No

Revenue Agreement: Select one

Tax Certificate No.: 6213376289

Expiration Date: 7/15/2023

Department: Public Works (57)

Department Contact: Rosa Kim

Customer (Finance Only): _____

Notes:

Department Director Signature: _____ Date

Office of the City Manager Signature: _____ Date