

Jose-Noel (Joel) Cadiz
Director of Facilities
San Mateo-Foster City School District
1170 Chess Drive,
Foster City, CA 94404

Subject: HVAC Study for San Mateo-Foster City School District

Dear Mr. Cadiz,

Thank you for inviting us to submit this Proposal to prepare a study of improving the HVAC systems at the District campuses.

Project Understanding

In July 2020, Aedis completed the Facilities Master Plan for the New Decade, in collaboration with the SMFCSD administration. This document identified at a high level, the comprehensive facility needs at all District campuses and established the estimated costs for these needs. Among the key recommendations in the Master Plan to improve the health and safety of students and staff are the upgrading and/or addition of air conditioning, with proper filtration to improve the indoor air quality of the District's facilities. To prepare for an implementation of certain high-priority items, the District requested that Aedis undertake a more in-depth study of HVAC improvements, considering unique constraints at each of the campuses.

Of the District's 27 campuses, the FMP identifies 24 campuses as Immediate Priorities to upgrade the HVAC system. This study will include only 23 of the 24 Immediate Priority campuses and excludes the 3 sites (District Office, Central Kitchen and M and O) that are not on the priority list as well as Bowditch. The reason for excluding Bowditch is that the HVAC system at Bowditch was installed only a few years ago and this campus is scheduled for a complete modernization in the near future, which could mean some buildings being replaced or completely configured.

Goals of This HVAC Study

1. Recommend high-performing HVAC that are cost-effective, energy-efficient, low-maintenance and durable, consistent with the FMP's decade-long time span.
2. Recommendations should consider industry trends as well as the regulatory climate (for example, building code requirements for Net-Zero-Energy and all-electric buildings).
3. Give consideration to the District's long-term aspirational goal, as expressed by the Board of Trustees, to have Net-Zero-Energy facilities.
4. Provide the District with credible cost projections for each site and the preparation needed to implement the work quickly, including next steps, as authorized by the District.

Planning Process

To meet the District's objectives in a short timeline and to minimize cost, we anticipate the following planning process.

1. Aedis and MEP consultants will obtain maintenance information on HVAC systems from District Facilities staff via the appropriate form of communication.
2. Obtain as-built record drawings (plans) of all identified campuses covered under this study. The District has stated that it will provide our team with any electronic plans it can locate, but the District lacks staffing resources to locate the hard-copy documents required from its plan room. Aedis will assign personnel to make a reasonable effort (2 days maximum) to locate the hard copy plans from the District plan room but will rely mostly on the electronic record that the District provides. Aedis will scan and share the hard copy plans with the District, and the original hard copies will be returned to the District.
3. Study the plans to understand the physical constraints of each campus.
4. Site visitation: MEP consultants will visit each of the identified campuses, accompanied by the District's Facilities personnel. Our team will need access to the interior of the buildings and the roof, wherever applicable.
5. MEP consultants will identify common conditions across all campuses and generate options for HVAC improvements for these typical conditions.
6. Aedis will evaluate MEP recommended options and provide an analysis of advantages and disadvantages of each option.
7. MEP consultants will evaluate the adequacy of electrical service at each campus affected by HVAC work under this study, taking into consideration other future needs including the addition of hot water throughout the District (hot water system is not part of this study).
8. Aedis and MEP consultants will extrapolate the recommended HVAC solutions and costs for the typical conditions to all parts of all 23 campuses.
9. Schedule and attend a preliminary consultation with DSA as part of the Aedis analysis to discuss the overall approach to understand if the proposed work may trigger any other work not part of the HVAC scope (such as fire alarm, fire sprinkler or ADA upgrades).
10. Hold 3 meetings with the District to accomplish the following:
 - a. Meeting #1: Present our findings of the typical conditions and our recommended options for the District's consideration and approval.

- b. Meeting #2: Present the cost and solution for all 23 campuses for the District's consideration and approval.
 - c. Meeting #3: Present our draft final report to the District.
11. We will engage an independent cost consultant to carry out a peer review of our cost projections to ensure accuracy and completeness.
 12. Report narrative: Aedis will prepare a narrative report to summarize the findings and recommendations as described below under Deliverables.
 13. At the District's discretion, we are available to present our findings to the Board at a single Board meeting.

Planning Schedule

We estimate that this study will take **10 weeks** to complete the tasks above, as follows:

KICK-OFF:	District to provide electronic record plans if available, as well as maintenance and construction history of HVAC systems.
WEEK 1:	Obtain electronic and hard copy record plans.
WEEK 2:	Review record plans and prepare background data.
WEEKS 3 TO 5:	Site visitation (given the complexity of the campuses and the need to gain roof access as well as detailed evaluation of existing HVAC systems and electrical load, we estimate that we will visit 8 to 9 campuses per week); concurrently, we will identify typical conditions and engineering solutions. Attend the preliminary consultation with DSA.
WEEK 6:	Meeting #1 with District, as described above.
WEEK 7:	Apply typical conditions to remaining parts of campuses and remaining campuses. DSA Pre-app review.
WEEK 8:	Meeting #2 with District, as described above.
WEEK 9:	Meeting #3 with District, as described above.
WEEK 10:	Finalize deliverables for submittal to District.

Deliverables

Our report will be in the form of a letter-size format and include the following content:

- Executive Summary that summarizes goals, process, findings and recommended solutions along with projected costs.
- Individual sections for each campus that include findings and recommended solutions along with projected costs.
- Site diagrams for reference to individual buildings.

Compensation

Our fee for this HVAC analysis is fixed lump sum of **\$228,350** including expenses, broken down as follows:

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| ▪ Architectural by Aedis: | \$99,760 |
| ▪ Mechanical by Cypress Engineering Group (including cost projection): | \$42,350 |
| ▪ Electrical by American Consulting Engineers (including cost projection): | \$66,000 |
| ▪ Cost Peer Review by OCCI: | \$20,240 |

Conditions of Proposal

1. SMFCSD will facilitate and provide access to all facilities on each campus for Aedis staff to visit.
2. We assume that there would be no structural modifications required. Structural engineering is not part of our scope.

Issues for District Consideration

1. To expedite this study upon Board approval, we recommend that the District begins locating the record plans (as-builts) that are available electronically and transmit them to us as soon as possible. Reviewing record plans will be our first task before visiting the sites or doing any engineering planning. We are not asking for plans that are not available electronically (hard copies), because we plan to use our staff to search the District plan room for those documents.
2. Similar to the item above, we recommend that the District provide us with an inventory of the year the HVAC systems at each of the campuses covered in this study were installed, as well as a list of past HVAC projects.
3. Some items that are not part of our study may be affected by HVAC work, including lighting, fire alarm and other low-voltage systems, especially if HVAC ductwork needs to be altered or added.

Thank you again for the opportunity to work with you on this study. Please let us know if you require additional information. We very much look forward to working with you again.

Sincerely,



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CEO
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