

EXHIBIT "A"
RESPONSIBILITIES AND SERVICES OF CONSULTANT

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EXHIBIT "A"

RESPONSIBILITIES AND SERVICES OF CONSULTANT

Consultant shall provide all professional services necessary for completing the following:

A. SCOPE OF SERVICES

Update the Facilities Master Plan (FMP) for implementation of funds under Bond Measure S, pursuant to Education Code Section 17070.54.

- Scope:
 1. Update the FMP with current enrollment and school capacity information.
 2. Incorporate Proposition 2 requirements established by the Office of Public School Construction (OPSC), a condition of participation in the School Facility Program (SFP) and to access state bond funds:
 - Gathering the information needed and formatting it to meet OPSC standards for inclusion in FMP update.
 - Coordinating with the funding team for submission to the state, updating the submission as needed.
 - Facilities inventory worksheets to be completed by the funding consultant.
 3. Update construction cost estimates and projections.
 4. Exclusions: Planning at the District office, MOT warehouse, and shared facilities; geotechnical engineering; and site topographic/boundary surveys.
- Planning Goals:
 1. Districtwide Transitional Kindergarten Plan (one formal coordination meeting, the remaining coordination to occur at the bond team meetings)
 2. Districtwide Middle School Plan (one formal coordination meeting, the remaining coordination to occur at the bond team meetings)
 3. Special Program Growth Plan for Orion Alternative and North Star Academy (one formal coordination meeting per site, the remaining coordination to occur at the bond team meetings)
 4. Small School Study (one formal coordination meeting, the remaining coordination to occur at the bond team meetings)
 5. Track and field renovation planning at the middle school.

- Proposed Meetings:
 1. Virtual meetings every two weeks with the Measure S Bond Team
 2. One principal/staff meeting per school
 3. Three regional community/parent meetings and survey
 4. One presentation to the Board of Trustees for approval of the updated FMP.

Scope reconciliation: The following Basic Services describe an update of the existing Facilities Master Plan within the scope and fixed fee reflected in QKA's October 22, 2026 proposal. Existing reports and data will be reviewed and updated as needed for the listed planning goals. References below to assessments, engineering input, educational specifications, eligibility, or studies mean planning-level review and coordination using available District information, not new detailed engineering investigations, separate educational specifications, new demographic forecasting contracts, project design or construction documents, or excluded surveys. Any expansion requires prior written District authorization under the Agreement. The meeting requirements in this Scope section control over inconsistent meeting counts or descriptions elsewhere in this Exhibit.

Consultant's duties and services under this Agreement shall not include preparing or assisting the District with any portion of the District's preparation of a request for proposals, request for qualifications, or any other solicitation regarding a subsequent or additional contract with the District. The District shall at all times retain responsibility for public contracting, including with respect to any subsequent phase of this Project. Consultant's participation in the planning, discussions, or drawing of project plans or specifications shall be limited to conceptual, preliminary, or initial plans or specifications. Consultant shall cooperate with the District to ensure that all bidders for a subsequent contract on any subsequent phase of this Project have access to the same information, including all conceptual, preliminary, or initial plans or specifications prepared by Consultant pursuant to this Agreement.

B. BASIC SERVICES

Consultant agrees to provide the Services described below:

1. COMPONENT 1: Compile Background Information & Intentions

Consultant shall gather background information on the District and District Facilities. This shall include the following information:

- a. **State Grant Eligibility:** Consultant shall coordinate planning information and OPSC documentation with the VPCS Funding Team. The VPCS Funding Team shall complete the facilities inventory worksheets and lead funding eligibility calculations; Consultant shall incorporate and coordinate the resulting information in the FMP update. State agencies determine funding eligibility and awards.
- b. **Facility Site Plans:** Consultant shall gather all existing School Site Plans with most recent DSA project application numbers

- c. **Demographics Report:** Consultant shall obtain the most recent District Demographics Report, and analyze for growth projections or other population presumptions that would affect long-term facilities planning.
- d. **Deferred Maintenance Plan:** Consultant shall obtain the most recent District Deferred Maintenance Plan and coordinate Facilities Master Plan scope to mesh with the Deferred Maintenance Plan.
- e. **Measure S Projects List:** Consultant shall reference the most recent list of unfunded projects that reflect previous goals or intentions by the District, that have not been achieved under the current Bond Measure S.
- f. **FIT / SARCs Reports: Consultant shall obtain copies of the most recent Facility Inspection Tool (FIT) reports and School Accountability Report Cards (SARCs) in order to mesh required scope with the Facilities Master Plan**
- g. **External and Internal Trends Analysis, Enrollment Projections, Space Utilization and Program Analysis:**
 - (i) The scope of work will include updating the Facilities Master Plan that ties to each site and respective Educational Specifications. The educational specifications information and growth capacity information from the updated Educational Specifications, where applicable, will be used to determine the type and amount of building space that would be needed as each site matures to final build-out. The information will translate into space requirements, land use, adjacencies, capacity/massing, circulation, infrastructure, and utility requirements.
 - (ii) The scope of work includes a review of the District's existing Facilities Master Plan, the District's Educational Specifications, and previous Facilities Master Plans in order to confirm that the documentation is adequate to form the basis for the updated Facilities Master Plan;
 - i. Provide specific linkages, where necessary, between the Educational Specifications and the Facilities Master Plan. Such linkage can be represented in both quantitative and qualitative data analysis to support the Educational Specifications and Facilities Master Plan. It is vital that proper analysis and linkages are articulated in the Facilities Master Plan process;
 - ii. Provide analysis that reflects trends in the San Mateo County demographic data provided by the District's Educational Services Department;
 - iii. Reflects space utilization rates provided by the District with growth in areas identified in the data;
 - iv. Ties to the remaining and future capital projects list, considers unfinished District bond projects identified by the District, prioritizes replacement and modernization needs based on existing assessments, and reflects current enrollment and program trends.

2. COMPONENT 2: Facilities Assessment

Facilities Building Systems and Infrastructure Condition Assessments Review, Analysis and Recommendations:

- a. Consultant shall review available campus reports and existing building systems and infrastructure assessments, including technology, accessibility, and facility condition. Consultant shall update the planning-level analysis and recommendations for replacement, upgrade, and expansion within the existing FMP framework. New detailed investigations, testing, and engineering studies are outside the Basic Services unless separately authorized in writing.
- b. Review the following existing assessments for each site where required and provide a written narrative and budgetary cost data of:
 - i. Structural systems assessment;
 - ii. Mechanical and controls system assessment;
 - iii. Campus electrical and gas infrastructure and building systems assessment;
 - iv. Plumbing and wastewater systems assessment;
 - v. Water systems;
 - vi. Lighting;
 - vii. Technology including A/V and IT wiring/infrastructure assessments, including all voice/data, Wi-Fi and other emerging technologies;
 - viii. Roof assessments;
 - ix. Campus accessibility;
 - x. Security systems
- c. Identify areas or systems that may result in operational cost savings, with an emphasis on those areas that may lead to a short-term return on investment. This is to be completed within the total cost of ownership framework. Coordinate this work with the District on such opportunities as energy efficiency, renewable energy, etc. that ultimately reduce the District's operating costs, GHG emission, carbon footprint and set a plan in motion towards carbon neutrality and State mandates.
- d. Review available campus energy and water information and existing MEP assessments to inform planning-level recommendations on operating efficiency and District sustainability goals. New energy modeling, metering, and detailed technical audits require separate written authorization.
- e. Provide budget-level pricing required to mitigate issues identified in the assessment report including building replacement or modernization costs, and

infrastructure repair and replacement costs. Include these costs as part of the overall Facilities Master Plan prioritization list of future capital projects.

- f. Coordinate the work with the District's Five-Year Capital Outlay Plan and state funded projects and assist in the development of a long-term replacement plan for buildings and/or equipment, based on their remaining useful life and campus sustainability strategies.

3. COMPONENT 3: Logical Project Structure

Based on the Facilities Assessment and engagement with each school community for input, the Consultant shall update the long-term improvement scope into an outline of logical projects. The project structure shall be based on the following criteria:

- construction logic
- potential resource (funding) opportunities
- planning logic
- project administration logic
- needs prioritization by the District.

Consultant's services shall include the following analysis:

- a. Identify buildings for replacement, modernization, demolition (including consideration of the total cost of ownership) and identify potential swing space;
- b. Identify sites for new construction;
- c. Identify potential new property acquisitions, if appropriate;
- d. Create building programs that are coordinated with the District's Five-Year Capital Outlay Plan future state funded projects;
- e. Update strategies for viable outdoor learning spaces, quads and courtyards, student gathering spaces, landscape plans, clarify and strengthen circulation patterns within each campus and suggest ideas to improve traffic safety as well as promote bicycle use and parking.
- f. Update a site analysis that will include massing analysis and future expansion. The firm will examine campus physical attributes and constraints, surrounding context, existing and potential future program needs. As part of the capacity/massing study, potential building sites would be identified and would show utility service connections and identify potential site issues. The study will provide total site capacity information for potential development.
- g. Update a comprehensive sequencing plan for identified projects, including but not limited to modernization and construction of infrastructure, modernization, new structures, energy efficiency projects, maintenance projects, parking and circulation improvements and swing space.
- h. Provide planning-level recommendations for site signage and wayfinding for pedestrian, bicycle, and vehicular circulation, including accessibility considerations. Detailed signage design is outside this planning scope.

- i. Incorporate recommendations related to campus infrastructure and building systems build out or replacement into the overall Facilities Master Plan and provide appropriate sequencing as related to new and renovation capital projects.
- j. Update several key design guidelines part of current and future campus development, focused on major elements that influence the overall project design:
 - i. Site and landscape challenges and opportunities, guidelines for future site development
 - ii. Architectural style guide
 - iii. Sustainability guidelines: The firm will aid the District in developing sustainability standards and/or principles that will be implemented within the updated Facilities Master Plan and each individual project. Include best practices (such as ZNE design, electrification, zero carbon or other environmental practices) and a review and coordination with the District's existing sustainability goals and initiatives.
 - iv. MEP campus standards that will balance project capital costs with long term operational costs; provide guidelines so that MEP systems can be designed, built, operated and maintained so as to minimize total cost of ownership at a site.
- k. **District Standards:** Consultant shall assist the District with updating District Technical Standards for facility improvements. These shall include, but may not be limited to the following:
 - (i) Site Improvements – paving, play fields, hardcourts, landscaping
 - (ii) Roofing materials & systems
 - (iii) Windows, Doors & other exterior Building Envelope components
 - (iv) Interior Finishes
 - (v) Fire Alarms, Data, Clocks / Communications, and AV systems
 - (vi) Technology Standards
 - (vii) HVAC Systems standards
 - (viii) Lighting systems
 - (ix) Plumbing systems / fixtures
 - (x) Furniture & Equipment
 - (xi) Window Coverings
 - (xii) Locks / Keyless Entries

4. Component 4: Resource Demand Modeling (Costs)

- a. Consultant shall update cost models for the various Logical Projects defined in the Facilities Master Plan, in order for the District to understand and project the necessary resources (demand) for achieving potential long-term improvements.
- b. Consultant shall have responsibility to update, review, and reconcile the cost estimates for the Facilities Master Plan program, which shall include all costs associated with the recommended facilities additions and improvements as approved by the District. The following conditions apply to the Construction Budget prepared by the Consultant:
 - i. All costs are to be based on current bid prices, with escalation rate and duration clearly identified as a separate line item; rate of cost escalation and projected bid and construction dates are to be approved by the District and its representatives.
 - ii. Format shall be in a building systems format (e.g., foundations, substructure, structural system, exterior wall enclosure, window systems, etc.) for new buildings, and summarized by the Construction Specification Institute ("CSI") categories for buildings being modernized.
 - iii. Contingencies for design, bidding, and construction are to be included as individual line items, with the percentage and base of calculation clearly identified.
 - iv. Consultant shall include all information and estimates from the District and/or the Construction Manager that are intended to be part of the cost estimate.
 - v. One week prior to submittal of documents, Consultant shall submit its proposed cost estimates to the District for review and approval. At that time, Consultant shall coordinate with the District to further update, review, and reconcile the cost estimates.
 - vi. All consultant(s) shall participate in the progress meeting as appropriate and shall provide input and feedback into the development of the cost estimates.
- c. The accuracy of the cost estimates shall be the responsibility of the Consultant.

- 5. Mandatory Assistance.** If a third-party dispute or litigation, or both, arises out of, or relates in any way to the Services provided under this Agreement, upon the District's request, the Consultant, its agents, officers, and employees agree to assist in resolving the dispute or litigation. Consultant's assistance includes, but is not limited to, providing professional consultations, attending mediations, arbitrations, depositions, trials or any event related to the dispute resolution and/or litigation ("Mandatory Assistance").

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C. UPDATING FACILITIES MASTER PLAN

1. Initiation

Upon final execution of the Agreement with the District, Consultant shall:

- a. Within the first week following execution of the Agreement, review the proposed Schedule of Services set forth in **Exhibit "C"** to the Agreement and prepare a detailed scope of work list and work plan for documentation in a computer-generated schedule to the District's satisfaction. This scope of work list and work plan will identify specific tasks including, but not limited to: interviews, data collection, analysis, report preparation, planning, architectural programming, concepts and schematic design preparation and estimating as well as Facilities Master Plan-level opinion of cost that are part of the Services. Consultant shall also identify milestone activities or dates, specific task responsibilities, required completion times necessary for review and approval by the District and by all regulatory agencies and additional definition of deliverables.
- b. Review the developed work plan with the District and its representatives to familiarize them with the proposed tasks and schedule and develop necessary modifications.

2. Update Facilities Master Plan

As part of the identified "COMPONENTS" shown above, the Consultant shall include the following services and prepare for the District's review the Facilities Master Plan as follows:

- a. Perform pre-design investigations to establish appropriate guidelines around which and within which the Updated Facilities Master Plan is to be designed. Identify design issues relating to functional needs, directives and constraints imposed by regulatory codes. Review all data pertinent to the Services including survey, site maps, geotechnical reports and recommendations, soil testing results reports, and pertinent historical data, and other relevant information provided by District.
- b. Consultant shall perform a Facilities Master Plan-level assessment of the project site(s) and all District facilities and identify any deficiencies in existing buildings, program and service areas, utility systems and infrastructure, telecommunications and health and safety conditions. Consultant shall identify and address needs for additional or renovated facilities to accomplish the District's educational initiatives.
- c. Identify and address needs for additional or renovated facilities to accomplish the District's educational initiatives, which shall include, but not limited to, the following:
 - i. Demographic and Enrollment Projections. Review the District's available enrollment projections for three (3), five (5), and ten (10) year periods, where provided, and update planning recommendations for school capacity. The District supplies the underlying demographic data and projections.

- ii. Capacity and Utilization Study and State Funding Coordination. Review school capacity and utilization using District data and the facilities inventory worksheets completed by the VPCS Funding Team. Coordinate applicable State and local loading standards and incorporate funding eligibility information provided by that team. OPSC retains responsibility for eligibility determinations and funding approvals.
 - iii. **Facilities Equity Study.** A facilities equity study, analyzing and comparing teaching and support spaces between the sites. These findings will be compared with the final Educational Specifications to determine the need for changes or additions in facilities and spaces necessary to accommodate the instructional program.
- d. Review DSA codes pertaining to the proposed Updated Facilities Master Plan.
 - e. Identify issues relating to functional needs, directives and constraints imposed by applicable regulatory codes.
 - f. Based on survey and topography data provided by the District, input into computer and develop existing Facilities Master Plan-level conditions base.
 - g. Administer Services as required to coordinate work with the District and among Consultants.
 - h. Update District standards for facilities and construction, including but not limited to designation of any material, product, thing or service by specific brand or trade name pursuant to Public Contract Code section 3400, subdivision (c).

3. Updated Facilities Master Plan – Contents

Consultant shall further ensure that the following contents are also included in the Facilities Master Plan:

- a. Clarify, conform or adjust the District's goals, objective and priorities as they relate to existing physical resources.
- b. Incorporate the available District enrollment projections, updated capacity and utilization analysis, and planning-level facilities comparisons to identify physical resources needed to support District goals and priorities.
- c. Describe and dimension the physical improvements in general terms to have a reasonable sense of purpose, size, and probable cost.
- d. Include individual site Facilities Master Plans, including recommendations for energy savings, incorporate deferred maintenance needs into each site.
- e. Express the physical requirements in a sequence that reflects the District's priorities and the realities of financing and phasing.
- f. Determine and coordinate the location of existing and future improvements in order to achieve a functional, attractive, and comprehensive design.

- g. Consider a 10-year timeline and have a well-conceived physical framework for making the day-to-day decisions and a framework flexible enough to accommodate changing circumstances and conditions not foreseeable when the plan was formulated.
- h. Document the planning basis for the District's management of its physical resources and incorporate state funding information supplied by the VPCS Funding Team.
- i. Include a phasing plan and approximate capital cost for implementing the plan concept. The phasing plan shall prioritize the District's short-term and long-term needs, exploring community and joint use needs.
- j. Include specific research and recommendations on existing facility condition, space utilization, renovation, construction and replacement, vehicular traffic and parking, pedestrian circulation and access, landscaping, lighting, wayfinding signage, utility infrastructure, regulatory implications and other issues that emerge during the Facilities Master Plan process.
- k. Include the goals of the Facilities Master Plan process and explain how they support the vision and mission of the District.
- l. Structure so that it provides for the flexible and cost-effective implementation of its recommendations, accommodating changes in need, priority, and resources over time and include estimates of the cost and timing of its recommendations.

4. Presentation

Consultant shall present the updated Facilities Master Plan at the meetings identified in the Scope section and at one Governing Board meeting for review and anticipated approval in May 2027. Additional Board presentations require prior written authorization.

5. Deliverables and Numbers of Copies

- a. Consultant shall provide to the District:
 - i. One electronic PDF and the available editable source files for the updated Facilities Master Plan, including planning graphics and cost tables prepared under this Agreement;
 - ii. Printed copies requested and authorized by the District, with printing charges accounted for under the Article 6 allowance without duplicate billing; and
 - iii. Existing educational specifications and other reference documents used in the update, where available. New fly-through videos and a separate educational specifications package are outside the Basic Services unless authorized in writing.

6. Meetings

During the development of the Facilities Master Plan, Consultant shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below in Section D.

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D. MEETINGS / SITE VISITS / WORKSHOPS

- 1.** Consultant shall attend, take part in, and, when indicated, conduct meetings, site visits, and workshops as indicated below. Consultant shall chair, conduct and take minutes of all coordination meetings with its Consultant(s) during the entire design phase. Consultant shall invite the District and/or its representative to participate in these meetings. Consultant shall keep a separate log to document design/coordination comments generated in these meetings.

2. General Meeting, Site Visit, and Workshop Requirements

- a. Consultant shall always be prepared to answer questions and issues from District staff, site staff, and community members, as applicable.
- b. Consultant shall maintain a log of all meetings, site visits or site observations, with documentation of major discussion points, observations, decisions, questions or comments. These shall be furnished to the District and/or its representative.
- c. Consultant shall provide electronic meeting materials as part of the Basic Services. District-authorized printing shall be charged only against the Article 6 allowance at documented cost, without markup or duplicate billing.
- d. Meeting duration shall be appropriate to the stated agenda and coordinated with the District. The specified meeting counts and types govern the included scope; additional meetings require prior written authorization.

3. Meetings During Initiation Phase

- a. Within the first week following execution of the Agreement, Consultant shall participate in one (1) kick-off meeting to determine the intent, scope, budget and timetable, which shall encompass the following:
 - i. Consultant, its appropriate consultant(s), and District staff, shall attend the meeting.
 - ii. The kick-off meeting will introduce key team members from the District and the Consultant to each other, defining roles and responsibilities.
 - iii. During this meeting, Consultant shall:
 - (A) Identify and review pertinent information and/or documentation necessary from the District for the completion of the Services.
 - (B) Review and explain the overall goals, general approach, tasks, work plan and procedures and deliverable products of the Services.
 - (C) Review and explain the scope of work and work plan for all parties present; determine any adjustments or fine tuning that needs to be made to the work plan.
 - (D) Review documentation of the kick-off meeting prepared by the District's representative and comment prior to distribution.

4. Initial Site Visits

- a. Consultant shall visit the project site(s) to complete a visual inventory and documentation of the existing conditions.
- b. Initial site observations shall be coordinated with the one principal/staff meeting per school and the included planning coordination meetings where practicable. A separate second round of engineering site meetings is not required unless authorized in writing.

5. Meetings During Update of Facilities Master Plan

- a. Consultant shall conduct three (3) regional community/parent meetings and a community survey, as identified in the Scope section.
- b. Consultant shall conduct one (1) principal/staff meeting per school. District facilities-team input shall be coordinated through these meetings and the Measure S Bond Team meetings.
- c. Included formal planning coordination consists of one (1) TK meeting, one (1) middle school meeting, one (1) meeting per special program site at Orion Alternative and North Star Academy, and one (1) Small School Study meeting. Track and field planning shall be coordinated through the middle school and Bond Team meetings. Remaining coordination occurs at the Bond Team meetings.
- d. Consultant shall obtain planning-level engineering input as needed within the agreed scope and coordinate that input through the included meetings. Separate technical studies require prior written authorization.
- e. Consultant shall attend virtual Measure S Bond Team meetings every two weeks during the November 2026 through April 2027 update period. These are the recurring steering and coordination meetings for this scope; a separate eight-meeting steering committee series is not included.

6. Governing Board Meeting

Consultant shall attend one District Governing Board meeting to present the updated Facilities Master Plan for review and anticipated approval in May 2027. This planning agreement does not authorize subsequent project design or construction.

[END OF EXHIBIT]