

**CITY OF SANTA ROSA
PROFESSIONAL SERVICES AGREEMENT
WITH TREANORHL
AGREEMENT NUMBER _____**

This "Agreement" is made as of this ____ day of _____, 2019, by and between the City of Santa Rosa, a municipal corporation ("City"), and TreanorHL, a Kansas Professional Association ("Consultant").

RECITALS

A. City desires to a qualified firm to work in conjunction with City staff to provide historical architectural design services for conceptual plans and construction documents for re-roofing of Luther Burbank Home and Carriage House.

B. City desires to retain a qualified firm to conduct the services described above in accordance with the Scope of Services as more particularly set forth in Exhibit A to the Agreement.

C. Consultant represents to City that it is a firm composed of highly trained professionals and is fully qualified to conduct the services described above and render advice to City in connection with said services.

D. The parties have negotiated upon the terms pursuant to which Consultant will provide such services and have reduced such terms to writing.

AGREEMENT

NOW, THEREFORE, City and Consultant agree as follows:

1. SCOPE OF SERVICES

Consultant shall provide to City the services described in Exhibit A ("Scope of Services") Consultant shall provide these services at the time, place, and in the manner specified in Exhibit A. Exhibit A is attached hereto for the purpose of defining the manner and scope of services to be provided by Consultant and is not intended to, and shall not be construed so as to, modify or expand the terms, conditions or provisions contained in this Agreement. In the event of any conflict between this Agreement and any terms or conditions of any document prepared or provided by Consultant and made a part of this Agreement, including without limitation any document relating to the scope of services or payment therefor, the terms of this Agreement shall control and prevail.

2. COMPENSATION

a. City shall pay Consultant for services rendered pursuant to this Agreement at the rates, times and in the manner set forth in Exhibit B. Consultant shall submit monthly statements to City

which shall itemize the services performed as of the date of the statement and set forth a progress report, including work accomplished during the period, percent of each task completed, and planned effort for the next period. Invoices shall identify personnel who have worked on the services provided, the number of hours each worked during the period covered by the invoice, the hourly rate for each person, and the percent of the total project completed, consistent with the rates and amounts shown in Exhibit B.

b. The payments prescribed herein shall constitute all compensation to Consultant for all costs of services, including, but not limited to, direct costs of labor of employees engaged by Consultant, travel expenses, telephone charges, copying and reproduction, computer time, and any and all other costs, expenses and charges of Consultant, its agents and employees. In no event shall City be obligated to pay late fees or interest, whether or not such requirements are contained in Consultant's invoice.

c. Notwithstanding any other provision in this Agreement to the contrary, the total maximum compensation to be paid for the satisfactory accomplishment and completion of all services to be performed hereunder shall in no event exceed the sum of one hundred and ten thousand, three hundred thousand and nineteen dollars and no cents \$110,319.00. The City's Chief Financial Officer is authorized to pay all proper claims from Charge Number JL 09747

3. DOCUMENTATION; RETENTION OF MATERIALS

a. Consultant shall maintain adequate documentation to substantiate all charges as required under Section 2 of this Agreement.

b. Consultant shall keep and maintain full and complete documentation and accounting records concerning all extra or special services performed by it that are compensable by other than an hourly or flat rate and shall make such documents and records available to authorized representatives of City for inspection at any reasonable time.

c. Consultant shall maintain the records and any other records related to the performance of this Agreement and shall allow City access to such records during the performance of this Agreement and for a period of four (4) years after completion of all services hereunder.

4. INDEMNITY

a. Consultant shall, to the fullest extent permitted by law, indemnify, protect, defend and hold harmless City, and its employees, officials and agents ("Indemnified Parties") from all claims, demands, costs or liability (including liability for claims, suits, actions, arbitration proceedings, administrative proceedings, regulatory proceedings, losses, expenses or costs of any kind, interest, defense costs, and expert witness fees), that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of Consultant, its officers, employees, or agents, in said performance of professional services under this Agreement, excepting only liability arising from the sole negligence, active negligence or intentional misconduct of City.

b. The existence or acceptance by City of any of the insurance policies or coverages described in this Agreement shall not affect or limit any of City's rights under this Section 4, nor shall the

limits of such insurance limit the liability of Consultant hereunder. This Section 4 shall not apply to any intellectual property claims, actions, lawsuits or other proceedings subject to the provisions of Section 17(b), below. The provisions of this Section 4 shall survive any expiration or termination of this Agreement.

5. INSURANCE

a. Consultant shall maintain in full force and effect all of the insurance coverage described in, and in accordance with, Attachment One, "Insurance Requirements." Maintenance of the insurance coverage set forth in Attachment One is a material element of this Agreement and a material part of the consideration provided by Consultant in exchange for City's agreement to make the payments prescribed hereunder. Failure by Consultant to (i) maintain or renew coverage, (ii) provide City notice of any changes, modifications, or reductions in coverage, or (iii) provide evidence of renewal, may be treated by City as a material breach of this Agreement by Consultant, whereupon City shall be entitled to all rights and remedies at law or in equity, including but not limited to immediate termination of this Agreement. Notwithstanding the foregoing, any failure by Consultant to maintain required insurance coverage shall not excuse or alleviate Consultant from any of its other duties or obligations under this Agreement. In the event Consultant, with approval of City pursuant to Section 6 below, retains or utilizes any subcontractors or subconsultants in the provision of any services to City under this Agreement, Consultant shall assure that any such subcontractor has first obtained, and shall maintain, all of the insurance coverages set forth in the Insurance Requirements in Attachment One.

b. Consultant agrees that any available insurance proceeds broader than or in excess of the coverages set forth in the Insurance Requirements in Attachment One shall be available to the additional insureds identified therein.

c. Consultant agrees that the insurance coverages and limits provided under this Agreement are the greater of: (i) the coverages and limits specified in Attachment One, or (ii) the broader coverages and maximum limits of coverage of any insurance policy or proceeds available to the name insureds.

6. ASSIGNMENT

Consultant shall not assign any rights or duties under this Agreement to a third party without the express prior written consent of City, in City's sole and absolute discretion. Consultant agrees that the City shall have the right to approve any and all subcontractors and subconsultants to be used by Consultant in the performance of this Agreement before Consultant contracts with or otherwise engages any such subcontractors or subconsultants.

7. NOTICES

Except as otherwise provided in this Agreement, any notice, submittal or communication required or permitted to be served on a party, shall be in writing and may be served by personal delivery to the person or the office of the person identified below. Service may also be made by mail, by placing

first-class postage, and addressed as indicated below, and depositing in the United States mail to:

City Representative:

Jen Santos, Deputy Director, Parks
55 Stony Point Road
Santa Rosa, CA 95401
707-543-3781
jsantos@srcity.org

Consultant Representative:

Nancy Goldenberg
Principal
460 Bush 2nd Floor
San Francisco, CA 94108
415-220-4450
ngodenberg@treanorhl.com

8. INDEPENDENT CONTRACTOR

a. It is understood and agreed that Consultant (including Consultant's employees) is an independent contractor and that no relationship of employer-employee exists between the parties hereto for any purpose whatsoever. Neither Consultant nor Consultant's assigned personnel shall be entitled to any benefits payable to employees of City. City is not required to make any deductions or withholdings from the compensation payable to Consultant under the provisions of this Agreement, and Consultant shall be issued a Form 1099 for its services hereunder. As an independent contractor, Consultant hereby agrees to indemnify and hold City harmless from any and all claims that may be made against City based upon any contention by any of Consultant's employees or by any third party, including but not limited to any state or federal agency, that an employer-employee relationship or a substitute therefor exists for any purpose whatsoever by reason of this Agreement or by reason of the nature and/or performance of any services under this Agreement.

b. It is further understood and agreed by the parties hereto that Consultant, in the performance of Consultant's obligations hereunder, is subject to the control and direction of City as to the designation of tasks to be performed and the results to be accomplished under this Agreement, but not as to the means, methods, or sequence used by Consultant for accomplishing such results. To the extent that Consultant obtains permission to, and does, use City facilities, space, equipment or support services in the performance of this Agreement, this use shall be at the Consultant's sole discretion based on the Consultant's determination that such use will promote Consultant's efficiency and effectiveness. Except as may be specifically provided elsewhere in this Agreement, the City does not require that Consultant use City facilities, equipment or support services or work in City locations in the performance of this Agreement.

c. If, in the performance of this Agreement, any third persons are employed by Consultant, such persons shall be entirely and exclusively under the direction, supervision, and control of Consultant. Except as may be specifically provided elsewhere in this Agreement, all terms of employment, including hours, wages, working conditions, discipline, hiring, and discharging, or any other terms of employment or requirements of law, shall be determined by Consultant. It is further understood and agreed that Consultant shall issue W-2 or 1099 Forms for income and employment tax purposes, for all of Consultant's assigned personnel and subcontractors.

d. The provisions of this Section 8 shall survive any expiration or termination of this Agreement. Nothing in this Agreement shall be construed to create an exclusive relationship between City and Consultant. Consultant may represent, perform services for, or be employed by such additional persons or companies as Consultant sees fit.

9. ADDITIONAL SERVICES

Changes to the Scope of Services shall be by written amendment to this Agreement and shall be paid on an hourly basis at the rates set forth in Exhibit B, or paid as otherwise agreed upon by the parties in writing prior to the provision of any such additional services.

10. SUCCESSORS AND ASSIGNS

City and Consultant each binds itself, its partners, successors, legal representatives and assigns to the other party to this Agreement and to the partners, successors, legal representatives and assigns of such other party in respect of all promises and agreements contained herein.

11. TERM, SUSPENSION, TERMINATION

a. This Agreement shall become effective on the date that it is made, set forth on the first page of the Agreement, and shall continue in effect until both parties have fully performed their respective obligations under this Agreement, unless sooner terminated as provided herein.

b. City shall have the right at any time to temporarily suspend Consultant's performance hereunder, in whole or in part, by giving a written notice of suspension to Consultant. If City gives such notice of suspension, Consultant shall immediately suspend its activities under this Agreement, as specified in such notice.

c. City shall have the right to terminate this Agreement for convenience at any time by giving a written notice of termination to Consultant. Upon such termination, Consultant shall submit to City an itemized statement of services performed as of the date of termination in accordance with Section 2 of this Agreement. These services may include both completed work and work in progress at the time of termination. City shall pay Consultant for any services for which compensation is owed; provided, however, City shall not in any manner be liable for lost profits that might have been made by Consultant had the Agreement not been terminated or had Consultant completed the services required by this Agreement. Consultant shall promptly deliver to City all documents related to the performance of this Agreement in its possession or control. All such documents shall be the property of City without additional compensation to Consultant.

12. TIME OF PERFORMANCE

The services described herein shall be provided during the period, or in accordance with the schedule, set forth in Exhibit A. Consultant shall complete all the required services and tasks and complete and tender all deliverables to the reasonable satisfaction of City, not later than December 31, 2021.

13. STANDARD OF PERFORMANCE

Consultant shall perform all services performed under this Agreement in the manner and according to the standards currently observed by a competent practitioner of Consultant's profession in California. All products of whatsoever nature that Consultant delivers to City shall be prepared in a professional manner and conform to the standards of quality normally observed by a person currently practicing in Consultant's profession, and shall be provided in accordance with any schedule of performance. Consultant shall assign only competent personnel to perform services under this Agreement. Consultant shall notify City in writing of any changes in Consultant's staff assigned to perform the services under this Agreement prior to any such performance. In the event that City, at any time, desires the removal of any person assigned by Consultant to perform services under this Agreement, because City, in its sole discretion, determines that such person is not performing in accordance with the standards required herein, Consultant shall remove such person immediately upon receiving notice from City of the desire of City for the removal of such person.

14. CONFLICTS OF INTEREST

Consultant covenants that neither it, nor any officer or principal of its firm, has or shall acquire any interest, directly or indirectly, that would conflict in any manner with the interests of City or that would in any way hinder Consultant's performance of services under this Agreement. Consultant further covenants that in the performance of this Agreement, no person having any such interest shall be employed by it as an officer, employee, agent or subcontractor, without the written consent of City. Consultant agrees to avoid conflicts of interest or the appearance of any conflicts of interest with the interests of City at all times during the performance of this Agreement.

15. CONFLICT OF INTEREST REQUIREMENTS

a. **Generally.** The City's Conflict of Interest Code requires that individuals who qualify as "consultants" under the Political Reform Act, California Government Code sections 87200 *et seq.*, comply with the conflict of interest provisions of the Political Reform Act and the City's Conflict of Interest Code, which generally prohibit individuals from making or participating in the making of decisions that will have a material financial effect on their economic interests. The term "consultant" generally includes individuals who make governmental decisions or who serve in a staff capacity.

b. **Conflict of Interest Statements.** The individual(s) who will provide services or perform work pursuant to this Agreement are "consultants" within the meaning of the Political Reform Act and the City's Conflict of Interest Code:

yes no (check one)

If "yes" is checked by the City, Consultant shall cause the following to occur within 30 days after execution of this Agreement:

- (1) Identify the individuals who will provide services or perform work under this Agreement as "consultants"; and

- (2) Cause these individuals to file with the City Clerk the assuming office statements of economic interests required by the City's Conflict of Interest Code.

Thereafter, throughout the term of the Agreement, Consultant shall cause these individuals to file with the City Clerk annual statements of economic interests, and "leaving office" statements of economic interests, as required by the City's Conflict of Interest Code.

The above statements of economic interests are public records subject to public disclosure under the California Public Records Act. The City may withhold all or a portion of any payment due under this Agreement until all required statements are filed.

16. CONFIDENTIALITY OF CITY INFORMATION

During performance of this Agreement, Consultant may gain access to and use City information regarding inventions, machinery, products, prices, apparatus, costs, discounts, future plans, business affairs, governmental affairs, processes, trade secrets, technical matters, systems, facilities, customer lists, product design, copyright, data, and other vital information (hereafter collectively referred to as "City Information") that are valuable, special and unique assets of the City. Consultant agrees to protect all City Information and treat it as strictly confidential, and further agrees that Consultant shall not at any time, either directly or indirectly, divulge, disclose or communicate in any manner any City Information to any third party without the prior written consent of City. In addition, Consultant shall comply with all City policies governing the use of the City network and technology systems. A violation by Consultant of this Section 16 shall be a material violation of this Agreement and shall justify legal and/or equitable relief.

17. CONSULTANT INFORMATION

a. City shall have full ownership and control, including ownership of any copyrights, of all information prepared, produced, or provided by Consultant pursuant to this Agreement. In this Agreement, the term "information" shall be construed to mean and include: any and all work product, submittals, reports, plans, specifications, and other deliverables consisting of documents, writings, handwritings, typewriting, printing, photostating, photographing, computer models, and any other computerized data and every other means of recording any form of information, communications, or representation, including letters, works, pictures, drawings, sounds, or symbols, or any combination thereof. Consultant shall not be responsible for any unauthorized modification or use of such information for other than its intended purpose by City.

b. Consultant shall fully defend, indemnify and hold harmless City, its officers and employees, and each and every one of them, from and against any and all claims, actions, lawsuits or other proceedings alleging that all or any part of the information prepared, produced, or provided by Consultant pursuant to this Agreement infringes upon any third party's trademark, trade name, copyright, patent or other intellectual property rights. City shall make reasonable efforts to notify Consultant not later than ten (10) days after City is served with any such claim, action, lawsuit or other proceeding, provided that City's failure to provide such notice within such time period shall not relieve Consultant of its obligations hereunder, which shall survive any termination or expiration of this Agreement.

c. All proprietary and other information received from Consultant by City, whether received in connection with Consultant's proposal, will be disclosed upon receipt of a request for disclosure, pursuant to the California Public Records Act; provided, however, that, if any information is set apart and clearly marked "trade secret" when it is provided to City, City shall give notice to Consultant of any request for the disclosure of such information. Consultant shall then have five (5) days from the date it receives such notice to enter into an agreement with the City, satisfactory to the City Attorney, providing for the defense of, and complete indemnification and reimbursement for all costs (including plaintiff's attorneys' fees) incurred by City in any legal action to compel the disclosure of such information under the California Public Records Act. Consultant shall have sole responsibility for defense of the actual "trade secret" designation of such information.

d. The parties understand and agree that any failure by Consultant to respond to the notice provided by City and/or to enter into an agreement with City, in accordance with the provisions of subsection c, above, shall constitute a complete waiver by Consultant of any rights regarding the information designated "trade secret" by Consultant, and such information shall be disclosed by City pursuant to applicable procedures required by the Public Records Act.

18. MISCELLANEOUS

a. Entire Agreement. This Agreement contains the entire agreement between the parties. Any and all verbal or written agreements made prior to the date of this Agreement are superseded by this Agreement and shall have no further effect.

b. Modification. No modification or change to the terms of this Agreement will be binding on a party unless in writing and signed by an authorized representative of that party.

c. Compliance with Laws. Consultant shall perform all services described herein in compliance with all applicable federal, state and local laws, rules, regulations, and ordinances, including but not limited to, (i) the Americans with Disabilities Act of 1990 (42 U.S.C. 12101, *et seq.*) ("ADA"), and any regulations and guidelines issued pursuant to the ADA; and (ii) Labor Code sections 1720, *et seq.*, which require prevailing wages (in accordance with DIR determinations at www.dir.ca.gov) be paid to any employee performing work covered by Labor Code sections 1720 *et seq.* Consultant shall pay to the City when due all business taxes payable by Consultant under the provisions of Chapter 6-04 of the Santa Rosa City Code. The City may deduct any delinquent business taxes, and any penalties and interest added to the delinquent taxes, from its payments to Consultant.

d. Discrimination Prohibited. With respect to the provision of services under this Agreement, Consultant agrees not to discriminate against any person because of the race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, or military and veteran status of that person.

e. Governing Law; Venue. This Agreement shall be governed, construed and enforced in accordance with the laws of the State of California. Venue of any litigation arising out of or

connected with this Agreement shall lie exclusively in the state trial court in Sonoma County in the State of California, and the parties consent to jurisdiction over their persons and over the subject matter of any such litigation in such court, and consent to service of process issued by such court.

f. Waiver of Rights. Neither City acceptance of, or payment for, any service or performed by Consultant, nor any waiver by either party of any default, breach or condition precedent, shall be construed as a waiver of any provision of this Agreement, nor as a waiver of any other default, breach or condition precedent or any other right hereunder.

g. Incorporation of Attachments and Exhibits. The attachments and exhibits to this Agreement are incorporated and made part of this Agreement, subject to terms and provisions herein contained.

19. AUTHORITY; SIGNATURES REQUIRED FOR CORPORATIONS

Consultant hereby represents and warrants to City that it is (a) a duly organized and validly existing Professional Association, formed and in good standing under the laws of the State of Kansas, (b) has the power and authority and the legal right to conduct the business in which it is currently engaged, and (c) has all requisite power and authority and the legal right to consummate the transactions contemplated in this Agreement. Consultant hereby further represents and warrants that this Agreement has been duly authorized, and when executed by the signatory or signatories listed below, shall constitute a valid agreement binding on Consultant in accordance with the terms hereof.

If this Agreement is entered into by a corporation, it shall be signed by two corporate officers, one from each of the following two groups: a) the chairman of the board, president or any vice-president; b) the secretary, any assistant secretary, chief financial officer, or any assistant treasurer. The title of the corporate officer shall be listed under the signature.

Executed as of the day and year first above stated.

CONSULTANT:

CITY OF SANTA ROSA
a Municipal Corporation

Name of Firm: TreanorHL

TYPE OF BUSINESS ENTITY (check one):

- Individual/Sole Proprietor
- Partnership
- Corporation
- Limited Liability Company
- Other (please specify: _____)

By: _____

Print Name: _____

Title: _____

Signatures of Authorized Persons:

APPROVED AS TO FORM:

By: K. Vance Kelley

Print Name: K. Vance Kelley

Title: Vice President

PCA 12/17/19
Office of the City Attorney

By: Faye Jones

Print Name: Faye Jones

Title: Chief Financial Officer

ATTEST:

City Clerk

City of Santa Rosa Business Tax Cert. No.

06524139

Attachments:

- Attachment One - Insurance Requirements
- Exhibit A - Scope of Services
- Exhibit B - Compensation

**ATTACHMENT ONE
INSURANCE REQUIREMENTS FOR
PROFESSIONAL SERVICES AGREEMENTS**

A. Insurance Policies: Consultant shall, at all times during the terms of this Agreement, maintain and keep in full force and effect, the following policies of insurance with minimum coverage as indicated below and issued by insurers with AM Best ratings of no less than A-:VI or otherwise acceptable to the City.

Insurance	Minimum Coverage Limits	Additional Coverage Requirements
1. Commercial general liability	\$ 1 million per occurrence \$ 2 million aggregate	Coverage must be at least as broad as ISO CG 00 01 and must include completed operations coverage. If insurance applies separately to a project/location, aggregate may be equal to per occurrence amount. Coverage may be met by a combination of primary and umbrella or excess insurance but umbrella and excess shall provide coverage at least as broad as specified for underlying coverage. Coverage shall not exclude subsidence.
2. Business auto coverage	\$ 1 million	ISO Form Number CA 00 01 covering any auto (Code 1), or if Consultant has no owned autos, hired, (Code 8) and non-owned autos (Code 9), with limit no less than \$ 1 million per accident for bodily injury and property damage.
3. Professional liability (E&O)	\$ 1 million per claim \$ 1 million aggregate	Consultant shall provide on a policy form appropriate to profession. If on a claims made basis, Insurance must show coverage date prior to start of work and it must be maintained for three years after completion of work.
4. Workers' compensation and employer's liability	\$ 1 million	As required by the State of California, with Statutory Limits and Employer's Liability Insurance with limit of no less than \$ 1 million per accident for bodily injury or disease. The Workers' Compensation policy shall be endorsed with a waiver of subrogation in favor of the City for all work performed by the Consultant, its employees, agents and subcontractors.

B. Endorsements:

1. All policies shall provide or be endorsed to provide that coverage shall not be canceled, except after prior written notice has been provided to the City in accordance with the policy provisions.

2. Liability, umbrella and excess policies shall provide or be endorsed to provide the following:
 - a. For any claims related to this project, Consultant's insurance coverage shall be primary and any insurance or self-insurance maintained by City shall be excess of the Consultant's insurance and shall not contribute with it; and,
 - b. **The City of Santa Rosa, its officers, agents, employees and volunteers are to be covered as additional insureds on the CGL policy.** General liability coverage can be provided in the form of an endorsement to Consultant's insurance at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10 and CG 20 37 if a later edition is used.

C. Verification of Coverage and Certificates of Insurance: Consultant shall furnish City with original certificates and endorsements effecting coverage required above. Certificates and endorsements shall make reference to policy numbers. All certificates and endorsements are to be received and approved by the City before work commences and must be in effect for the duration of the Agreement. The City reserves the right to require complete copies of all required policies and endorsements.

D. Other Insurance Provisions:

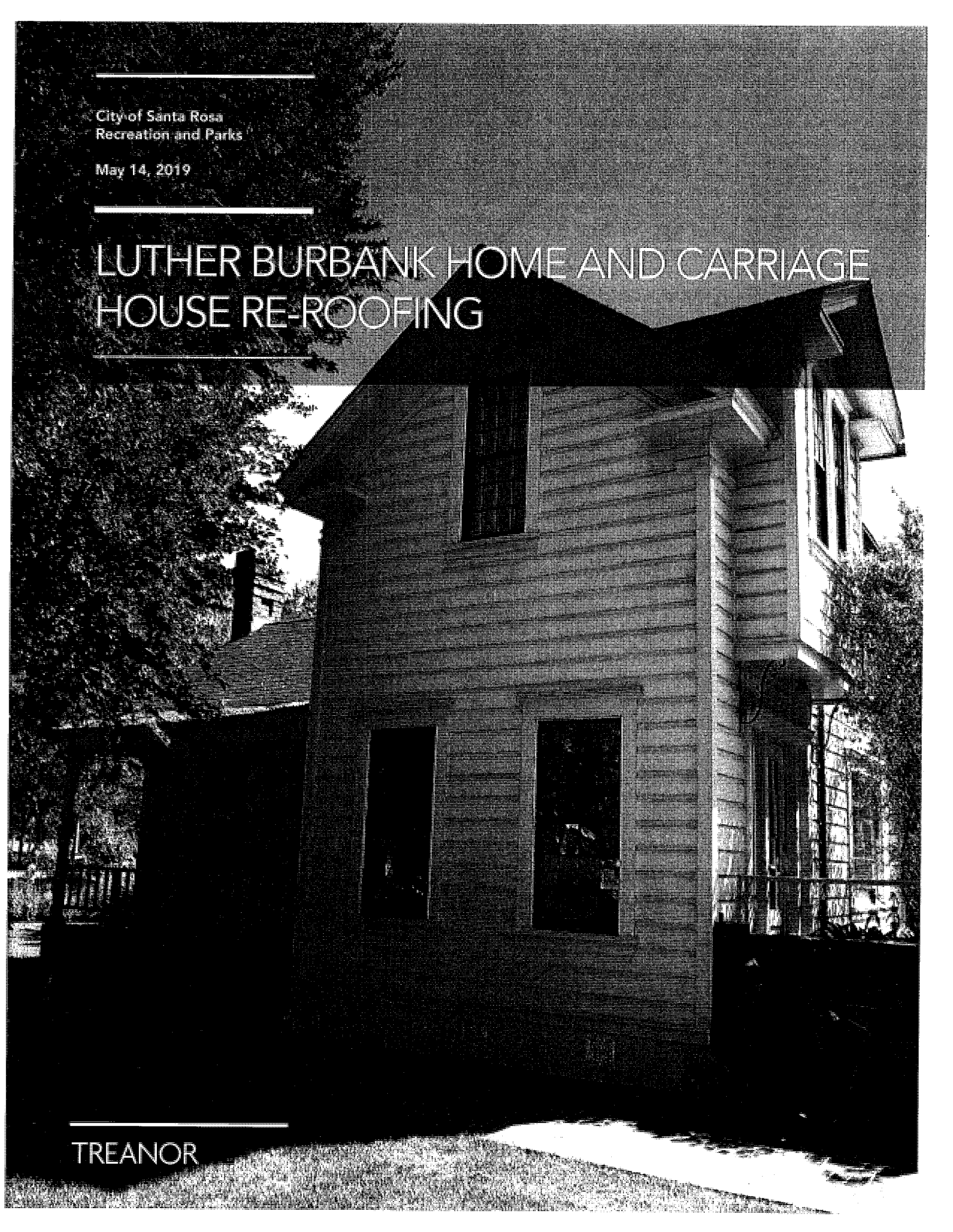
1. No policy required by this Agreement shall prohibit Consultant from waiving any right of recovery prior to loss. Consultant hereby waives such right with regard to the indemnitees.
2. All insurance coverage amounts provided by Consultant and available or applicable to this Agreement are intended to apply to the full extent of the policies. Nothing contained in this Agreement limits the application of such insurance coverage. Defense costs must be paid in addition to coverage amounts.
3. Policies containing any self-insured retention (SIR) provision shall provide or be endorsed to provide that the SIR may be satisfied by either Consultant or City. Self-insured retentions above \$10,000 must be approved by City. At City's option, Consultant may be required to provide financial guarantees.
4. Sole Proprietors must provide a representation of their Workers' Compensation Insurance exempt status.
5. City reserves the right to modify these insurance requirements while this Agreement is in effect, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

City of Santa Rosa
Recreation and Parks

May 14, 2019

LUTHER BURBANK HOME AND CARRIAGE HOUSE RE-ROOFING

TREANOR



TREANORHL

May 14, 2019

Luther Burbank Home and Garden Historical Architectural Services Review Committee
City of Santa Rosa
Recreation and Parks Department
55 Stony Point Road
Santa Rosa, CA 65401

RE: Historical Architectural Design Services to Prepare Conceptual Plans and Construction Documents for the Historic Luther Burbank Home and Carriage House

Dear Luther Burbank Home and Garden Historical Architectural Services Review Committee,

It is with great pleasure that we submit this proposal to provide historical architectural design services for the Luther Burbank Home and Carriage House Re-Roofing.

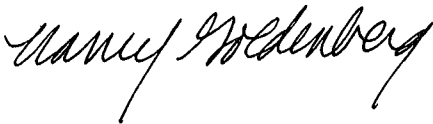
TreanorHL's Historic Preservation studio has provided similar services throughout the Bay Area, Northern California and nationally, for many years. We have worked on house museums, such as the David Glass House in San Ramon and the Dunsmuir House in Oakland, and have replaced many roofs on historic buildings, as shown in this proposal. We recently worked in Santa Rosa as well, having completed studies for Santa Rosa Junior College.

We will staff the project primarily with our in-house experts – Kimberly Butt, Elizabeth Graux, Aysem Kilinc, and me, Nancy Goldenberg. All of us have advanced degrees in architectural history or historic preservation, on top of undergraduate degrees in architecture. Kim, Elizabeth and I are all licensed California architects. And I began my career working for New York State Parks, where I was responsible for the maintenance and repair of two dozen house museums and ancillary structures. In addition to our local staff, we have assigned Julia Manglitz to the project. Julia is a member of our Historic Preservation studio whose specialty is building envelopes and roofs.

We have partnered with Pivot Structural Engineering and Saylor Consulting Group, cost estimator. Pivot will review the building structure if we consider cladding the roofs with slate to determine whether the structures can support the additional weight.

Thank you for your consideration, and we look forward to getting started!

Sincerely,



Nancy Goldenberg
PRINCIPAL
460 Bush 2nd Floor
San Francisco, CA 94108
ngoldenberg@treanorhl.com
o 415.773.0773
d 628.220.4450
c 415.254.1051



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PROJECT TEAM QUALIFICATIONS/RESUMES



NANCY GOLDENBERG AIA, LEED AP

Principal-in-Charge | TreanorHL

EDUCATION

Master of Arts, Architectural History
Cornell University

Bachelor of Arts, Architecture
University of California, Berkeley

REGISTRATION

Registered Architect:
California C25019

CERTIFICATION

LEED Accredited Professional

Meets CFR 36 Part 61:
Historic Architecture & Architectural History
Professional Qualifications Standards

ASSOCIATIONS

American Institute of Architects

Association for Preservation Technology
International

San Francisco Architectural Heritage
Former Board Member

Port of San Francisco Code Advisory Committee

YEARS OF EXPERIENCE

Total: 40
This Firm: 28

Both an architect and architectural historian, Nancy has focused her career on the preservation of historic buildings. She began her career with eight years at the New York State Bureau of Historic Sites, where, working side-by-side with fine arts conservators, she gained substantial training and experience in the conservation of stone, mortar, metals, plaster and paint. Returning to California and work in the private sector, Nancy applied her combined skills to projects at the California State Capitol, Oakland City Hall, and San Francisco City Hall. She especially enjoys projects that combine her expertise in design, conservation and architectural history.

REPRESENTATIVE PROJECTS

Pier 29 Fire Reconstruction

San Francisco, CA

Role: Principal-in-Charge

Description of relevant scope:
researched original drawings and pre-fire photos to confirm the supporting structure and roof type, as well as studied the roof drainage systems to verify proper drainage.

Bing Kong Tong Rehabilitation

Isleton, CA

Role: Principal-in-Charge

Description of relevant scope:
replaced roof cladding and sheathing, trusses supporting the roof were examined and reinforced, all flashing was replaced.

Forest Hill Clubhouse

Rehabilitation

San Francisco, CA

Role: Principal-in-Charge

Description of relevant scope:
evaluated existing conditions and researched original roof, original roof was wood shingle but due to local building codes an asphalt shingle style was decided on for the replacement. New gutters and leaders were also installed.

The Sacred Heart School Envelope Repair

Atherton, CA

Role: Principal-in-Charge

Description of relevant scope:
prepared construction documents detailing replacement of deteriorated slate claddings.

Stanley Mosk Library & Courts Rehabilitation

Sacramento, CA

Role: Principal-in-Charge

Napa County Courthouse Rehabilitation

Napa, CA

Role: Principal-in-Charge

California State Capitol Infrastructure Upgrades

Sacramento, CA

Role: Principal-in-Charge

Palace of Fine Arts Rehabilitation

San Francisco, CA

Role: Principal-in-Charge

German Consulate Complex Rehabilitation

San Francisco, CA

Role: Principal-in-Charge



KIMBERLY J. BUTT AIA

Project Manager | TreanorHL

EDUCATION

Master of Science, Architecture
emphasis Architectural History
University of California, Berkeley

Bachelor of Architecture
University of Arkansas, Fayetteville

REGISTRATION

Registered Architect:
California C30301
Washington 12872

CERTIFICATION

NCARB

Meets CFR 36 Part 61:
Historic Architecture & Architectural History
Professional Qualifications Standards

ASSOCIATIONS

American Institute of Architects
Society of Architectural Historians
Historic Preservation Advisory Committee
Richmond, CA (2005 - 2017)
California Preservation Foundation
Design Review Board
Richmond, CA (2017-present)

YEARS OF EXPERIENCE

Total: 19
This Firm: 5

* indicates experience
with previous employer

Kim enjoys investigating and researching historic structures and sites. Discovering their unique histories and original construction is rewarding to her. But she truly relishes restoring and rehabilitating those properties for future generations.

As a preservation architect and architectural historian, Kim has completed projects ranging from condition assessments and master plans to the complete design of building restorations and rehabilitation. Additionally, she has extensive experience in historic resource analysis and review for CEQA and NEPA compliance, California State Historic Preservation Office review, and the implementation of California Historic Building Code for qualified projects.

REPRESENTATIVE PROJECTS

Napa First United Methodist Church Seismic Repair, Re-roof and Selective Rehabilitation*

Napa, CA
Role: Project Manager
Description of relevant scope:
Oversaw all historic and architectural aspects of the design for the rehabilitation to the church building following the Napa earthquake. The existing asphalt shingle gable roof was replaced with new asphalt shingles and the low-slope roof was replaced with a new liquid membrane.

Palace of Fine Arts Rehabilitation, Roof Rehabilitation

San Francisco, CA
Role: Historic Preservation Specialist
Description of relevant scope:
Surveyed existing conditions, prepared color studies and prepared design details for the complete roof replacement.

Napa County Courthouse Seismic Rehabilitation

Napa, CA
Role: Project Manager

Novato City Hall Relocation & Rehabilitation*

Novato, CA
Role: Historic Preservation Specialist
Description of relevant scope:
Oversaw all historic aspects of the design for the relocation, rehabilitation and addition to the former church building. The existing asphalt shingle gable roof was replaced with new asphalt shingles and new solar shingles in select locations.

German Consulate Complex Rehabilitation

San Francisco, CA
Role: Project Manager

Pier 27 Bus Shelter

San Francisco, CA
Role: Project Manager

California Capitol Miscellaneous Projects

Sacramento, CA
Role: Project Manager

Emporium Dome & Facade Rehabilitation

San Francisco, CA
Role: Historic Preservation Specialist



JULIA MATHIAS MANGLITZ AIA, LEED AP Roofing Specialist | TreanorHL

EDUCATION

Master of Architecture
University of Kansas

Bachelor of Science, Aerospace Engineering
University of Kansas

REGISTRATION

Registered Architect:
Kansas 5454

CERTIFICATION

NCARB

LEED Accredited Professional

Meets CFR 36 Part 61:
Historic Architecture Professional
Qualifications Standards

ASSOCIATIONS

- National Trust for Historic Preservation
- Association for Preservation Technology International
- APT Central Plains
- American Institute of Architects
- AIA Kansas
- Kansas Preservation Alliance
- Missouri Preservation
- Preservation Oklahoma
- Douglas County (Kansas) Heritage Conservation Council
- Construction History Society of America
- Preservation Trades Network

YEARS OF EXPERIENCE

Total: 19
This Firm: 16

Understanding the role historic properties play in the development of a community's character, Julia works with owners to safeguard their properties' historic integrity while creating functional spaces for contemporary and future generations.

In addition to her proficiency in holistic preservation, Julia specializes in exterior restoration. She has devoted her career to understanding historic construction methods and materials and relishes technically challenging projects. Skilled in assessments, design and contract administration she is as comfortable on a construction site as the office. She builds collaborative relationships with consultants and contractors to deliver award-winning projects.

REPRESENTATIVE PROJECTS

Gwynn Hall Renovation

University of Missouri
Columbia, MO

Role: Envelope Specialist

Description of relevant scope:
repaired slate roof by replacing broken slates and reattaching slates that had slipped.

Replacement slates were matched to the original slates in size, colorway and texture.

Abigail Morse Hall Remodel

Emporia State University
Emporia, KS

Role: Envelope/Roofing Specialist

Description of relevant scope:
complete steep and low slope roofing replacement including flashings, through-wall flashing for parapets on gables, built-in and hung gutters, snow guards.

Hale Library Fire Recovery

Kansas State University
Manhattan, KS

Role: Project Manager

Description of relevant scope:
complete steep slope roof replacement including gutters, flashings and framing repairs at the eave.

St. Benedict's Abbey Roof

Atchinson, KS

Role: Roofing Specialist

Description of relevant scope:
Remove and relay salvaged slate, replacing as necessary. Replace all copper flashings and roof drainage components as well as repair gypsum plank roof deck.

Oklahoma State Capitol Exterior Rehabilitation

Oklahoma City, OK

Role: Historic Preservation Specialist

Description of relevant scope:
assessing copper roof systems and designing replacement copper installations, including standing seam, flat lock, and roof drainage systems.

Kansas Statehouse Copper Roof & Dome Replacement

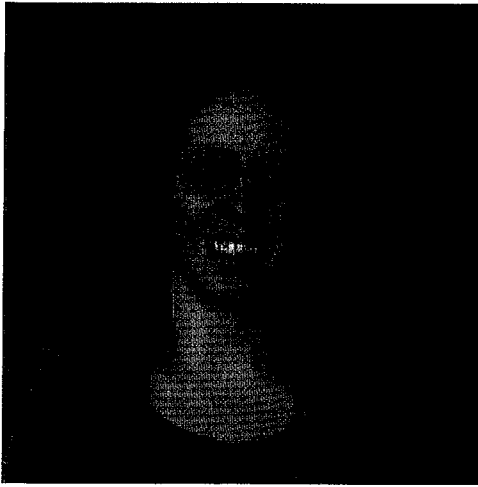
Topeka, KS

Role: Envelope Specialist/Roofing Specialist

German Consulate Complex Rehabilitation

San Francisco, CA

Role: Envelope Specialist



ELIZABETH GRAUX

Preservation Architect | TreanorHL

EDUCATION

Master of Arts
Historic Preservation Certificate in
Museum Studies
University of Delaware

Bachelor of Architecture
California State Polytechnic University

REGISTRATION

Registered Architect:
California C36720

CERTIFICATION

Meets CFR 36 Part 61: Historic Architect
& Architectural History Professional
Qualifications Standards

ASSOCIATIONS

American Institute of Architects
AIA California
California Preservation Foundation

YEARS OF EXPERIENCE

Total: 10
This Firm: 8

Elizabeth is experienced in both historic preservation and architectural practice. After receiving her master's degree, she prepared a condition assessment of 48 cabins at Curry Village in Yosemite National Park, documented the structures through measured drawings, and made recommendations for their rehabilitation. At Carey & Co., she has worked on the rehabilitation of a number of historic buildings. One of her more intensive assignments was the repair and restoration of the fire damaged Pier 29 bulkhead structure. The project was completed in 10 months under a schedule driven by the America's Cup.

REPRESENTATIVE PROJECTS

Pier 29 Fire Reconstruction

San Francisco, CA

Role: Project Manager

Description of relevant scope:
researched original drawings and
pre-fire photos to confirm the
supporting structure and roof type,
as well as studied the roof drainage
systems to verify proper drainage.

Bing Kong Tong Rehabilitation

Isleton, CA

Role: Preservation Architect

Description of relevant scope:
replaced roof cladding and
sheathing, trusses supporting the
roof were examined and reinforced,
all flashing was replaced.

Forest Hill Clubhouse Rehabilitation

San Francisco, CA

Role: Preservation Architect

Description of relevant scope:
evaluated existing conditions and
researched original roof, original
roof was wood shingle but due
to local building codes an asphalt
shingle style was decided on for
the replacement. New gutters and
leaders were also installed.

Piers 26, 38 & 29 Engineering & Use Study

San Francisco, CA

Role: Preservation Architect

German Consulate Complex Rehabilitation & Seismic Upgrade

San Francisco, CA

Role: Preservation Architect

Napa County Courthouse Seismic Rehabilitation

Napa, CA

Role: Preservation Architect

War Memorial Veterans Building Historic Structure Report & Rehabilitation

San Francisco, CA

Role: Preservation Architect

Contra Costa Finance Building Rehabilitation

Martinez, CA

Role: Preservation Architect

Alameda Valve House Relocation Monitoring

San Francisco, CA

Role: Preservation Architect



AYSEM KILINC ASSOCIATE AIA

Architectural Historian | TreanorHL

EDUCATION

Master of Science, Historic Preservation
University of Pennsylvania

Master of Science, Restoration & Preservation
Middle East Technical University, Turkey

Bachelor of Architecture
Middle East Technical University, Turkey

CERTIFICATION

Meets CFR 36 Part 61: Historic Architect
& Architectural History Professional
Qualifications Standards

ASSOCIATIONS

American Institute of Architects

Association for Preservation Technology
International

California Preservation Foundation

YEARS OF EXPERIENCE

Total: 8
This Firm: 5

Intrigued by architecture and fascinated by history, Aysem has devoted her career to studying, documenting and interpreting the built environment and the cultures that shape it. As an architectural historian, her work informs the planning and design of architectural preservation and rehabilitation projects. Her extensive experience includes preservation planning, historic resource evaluation, historic documentation (HABS), National Historic Preservation Act/Section 106 reviews, tax credit application preparation, National Register eligibility reviews. Throughout her career, she has worked on a variety of projects ranging from single family residences to large government facilities.

REPRESENTATIVE PROJECTS

Bing Kong Tong Rehabilitation

Isleton, CA

Role: Architectural Historian

Description of relevant scope:

replaced roof cladding and sheathing, trusses supporting the roof were examined and reinforced, all flashing was replaced.

Historic Resource Evaluation & Historic Resources Technical Report

Santa Rosa Junior College

Santa Rosa, CA

Role: Architectural Historian

Pier 90 Peer Review

San Francisco, CA

Role: Architectural Historian

Mill Valley City Hall Secretary of the Interior's Standards Compliance Assessment

Mill Valley, CA

Role: Architectural Historian

Garcia Hall Secretary of the Interior's Standards Compliance Assessment

Santa Rosa Junior College

Santa Rosa, CA

Role: Architectural Historian

German Consulate Complex Rehabilitation

San Francisco, CA

Role: Architectural Historian

2nd Street Improvement Section 106 Review

San Francisco, CA

Role: Architectural Historian

North Point Outfall System Rehabilitation Section 106 Review

San Francisco, CA

Role: Architectural Historian

Emergency Medical Services, Historic Resource Evaluation

San Francisco, CA

Role: Architectural Historian

495 Cambridge Street Historic Resource Evaluation

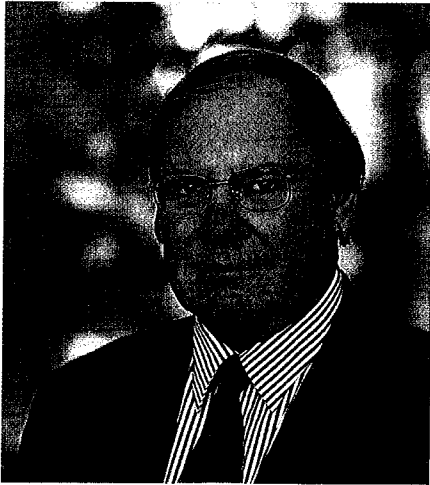
San Francisco, CA

Role: Architectural Historian

200 4th Street Historic Resources Evaluation

Oakland, CA

Role: Architectural Historian



IAN SLIGHT

Senior Cost Estimator | Saylor Consulting

Mr. Slight is a professional construction manager having 35 years experience in the construction industry with consultancy organizations, general contractors and owners, a latter emphasis on Program – Project Management and Owner's Representation. Areas of expertise include pre-construction services, all phases of project development, including programming, feasibility studies, site planning, and costing architectural design, and value engineering. Mr. Slight has been involved in numerous historic renovations, national and state park projects, ferry terminals, and state and federal office projects throughout California.

REPRESENTATIVE PROJECTS

Palace of Fine Arts Dome Restoration

San Francisco, CA
Role: Senior Cost Estimator
Description of relevant scope: repair included the rotunda's ceiling membrane and clad the dome with a urethane rubber roofing membrane.

State Library & Courts Historic Renovation

Sacramento, CA
Role: Senior Cost Estimator

James A. Walsh Federal Courthouse

Tucson, AZ
Role: Senior Cost Estimator

Glass House State Historic Landmark

San Ramon, CA
Role: Senior Cost Estimator

EDUCATION

Auckland Institute of Technology,
Bachelor of Building Graduate, Executive
Management Program (NZIM)

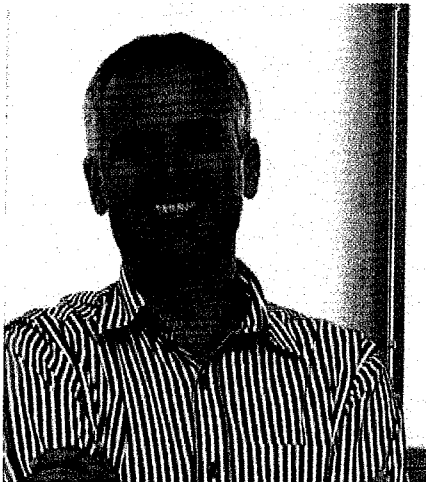
REGISTRATION

Certified Quantity Surveyor
Certified Building Surveyor

Angel Island Immigration Station Restoration

Angel Island, CA
Role: Senior Cost Estimator

OPTIONAL CONSULTANT



ALEX ROOD P.E., S.E.

Structural Engineer | Pivot Structural Engineering

For more than 24 years, Alex has worked on a broad range of engineering projects including designing structural systems for large and small-scale seismic retrofitting projects. Alex has been involved in the engineering of over 800 projects. Prior to his own companies, he worked as a structural engineer for Sir William Halcrow Ltd. in Hong Kong and joined Faye Bernstein and Associates.

REPRESENTATIVE PROJECTS

Bing Kong Tong Rehabilitation

Isleton, CA
Role: Structural Engineer
Description of relevant scope: replaced roof cladding and sheathing, trusses supporting the roof were examined and reinforced, all flashing was replaced.
Role: Structural Engineer

California Nursery President's House

Fremont, CA
Role: Structural Engineer

Novato Depot

Novato, CA
Role: Structural Engineer

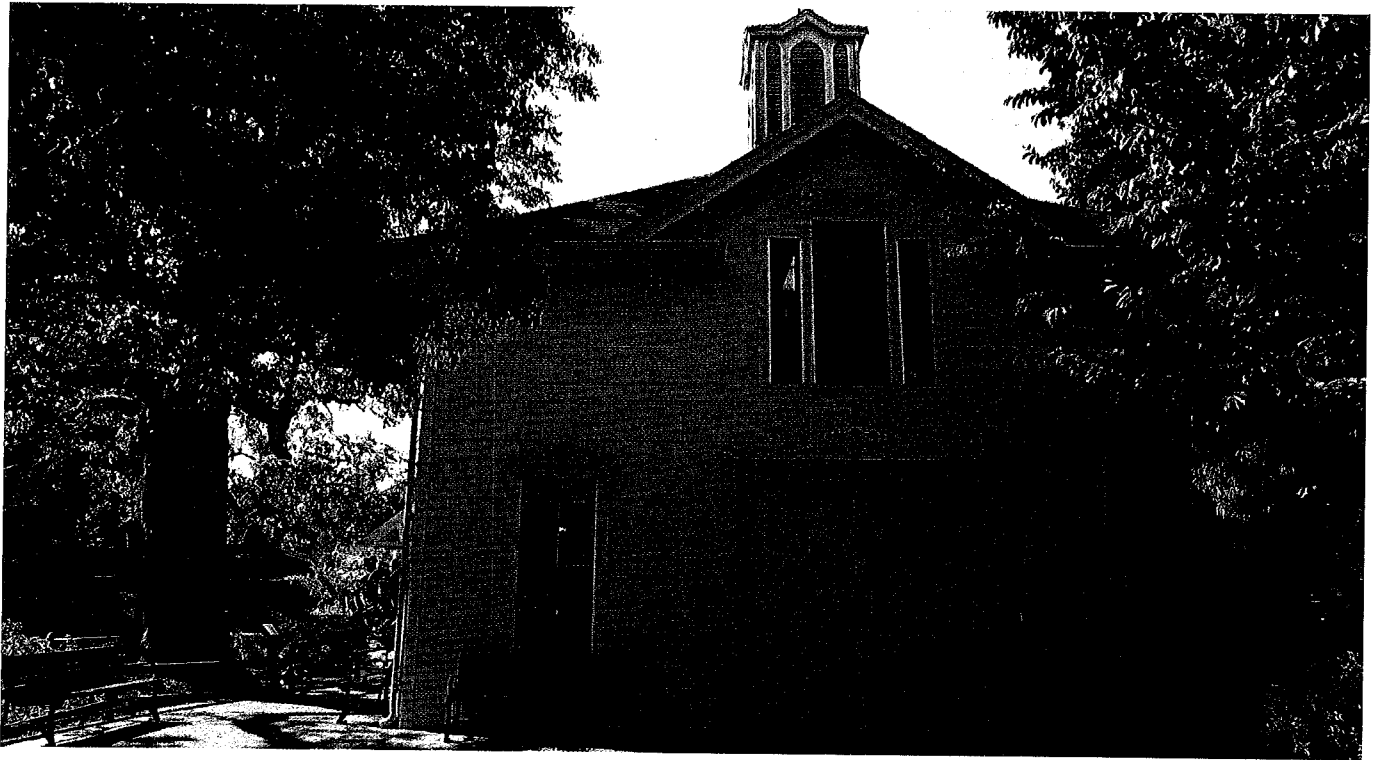
EDUCATION

B.S. | Civil Engineering with Structural
Emphasis | California State University |
Chico, 1990

REGISTRATION

Licensed Structural Engineer, State of
California, S4492
Licensed Civil Engineer, State of California,
C56065
Member SEAONC since 1995

WORK PLAN



Work Plan

DESCRIPTION OF THE PROJECT UNDERSTANDING

There are two primary goals of the project. The first is functional, the second aesthetic. Functionally, we will design a watertight roof cladding and drainage system. Given recent events in Santa Rosa, the roofing system must also be fire-resistant, and compliant with building codes. Aesthetically, we will conduct research to determine the most historically appropriate roofing. The ideal solution will meet all functional and aesthetic requirements. The Secretary of the Interior's Standards for the Treatment of Historic Properties will guide all our decisions.

DETAILED PROJECT APPROACH

A detailed scope of services is located in the Scope of Services section. This section discusses our overall approach to doing the work. As noted above, the Standards will be our guide throughout the project. After conducting archival research and a thorough building investigation, we will determine whether restoration or rehabilitation is the most appropriate treatment. The Standards include four treatments: rehabilitation, restoration, preservation and reconstruction. The Standards for each vary slightly.

One of our first tasks will involve research. All staff in the San Francisco office have graduate degrees in either historic preservation or architectural history, and all are very experienced at architectural research. Research would be done in accordance with National Register Bulletin #39, "Researching a Historic Property." When researching, we keep careful track of our sources, so that we can provide back-up for our decisions. We will look at all logical repositories for information on original or early roof cladding. These repositories might include:

- Sonoma County Library
- City of Santa Rosa Aerial Viewer (Aerial photos dating as far back as 1942)

- Records at the Luther Burbank Home & Gardens itself (we understand that photos and drawings have already been searched, but there may be additional information in written records)
- Building permit records

At the same time, we will conduct a physical examination of the building. Very often, clues to the original materials can be found on the building itself, in the form of nails and nailing patterns. We are especially interested in investigating the original wooden rain gutters, mentioned in the RFP, and in determining why they were covered, and whether they (once repaired or replaced-in-kind) can be incorporated into the final roof design.

TreanorHL has worked on several properties listed on the National Register and are well versed in repairing structures without jeopardizing the National Register status. The best way to ensure that the integrity of the property is maintained – and therefore its historic status – is to comply with the Secretary of the Interior's Standards for the Treatment of Historic Properties. The Standards permit alterations to a building, as long as they are appropriate. Sound roof cladding and effective drainage systems are critical to the health of the building as a whole. Therefore, it is expected that roof cladding is periodically replaced as part of building maintenance. Even very durable cladding materials, such as slate and clay tiles, eventually need replacement. For this project, we will conduct research and physical investigations to determine the original roofing material. If we cannot find definitive information, we will determine the most appropriate cladding material. We will include detailed protection specifications in our project set, to protect building and site features during the construction.

PROJECT SCHEDULE/TASK LIST

The following are two project schedules, one with a Cultural Heritage Board meeting, the other without. The schedule without the CHB meeting completes the construction documents within the seven-month time frame listed in the RFP. The other takes a bit longer because of the CHB meeting. We have allowed an additional month in the schedule to prepare for the meeting, since we assume that a design packet would need to be submitted to the Board a few weeks prior to the meeting. We have also allowed time following the meeting to adjust the drawings prior to the next step in the process.

EP OCT NOV DEC JAN 2020 FEB MAR

(7/4/19—7/17/19)
19—7/24/19)
25/19—8/14/19)
3/21/19)
Required (8/22/19—8/28/19)
—9/26/19)
—10/2/19)
0/3/19—10/3/19)
0/3/19—10/3/19)

• Prepare required drawing sheets (10/17/19—11/27/19)
• Prepare draft specifications (10/17/19—11/27/19)
• Cost Estimate (11/28/19—12/11/19)
• Submit 75% Cds (12/12/19)
• City Review (12/12/19—12/25/19)

CONSTRUCTION DOCUMENTS

75%
(10/17/19—12/25/19)

• Revise & add to documents as required (12/26/19—2/5/20)
• Cost estimate (2/6/20—2/19/20)
• City review (2/20/20—3/4/20)
• Prepare final bid set (3/5/20—3/18/20)

CONSTRUCTION DOCUMENTS

100%
(12/26/19—3/18/20)

EP

OCT

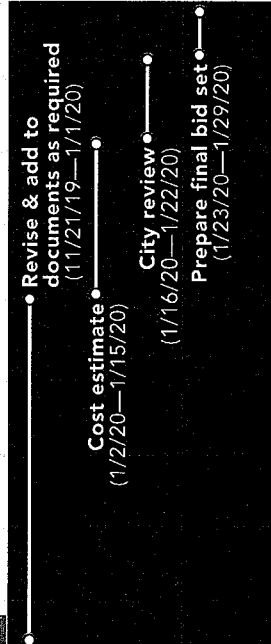
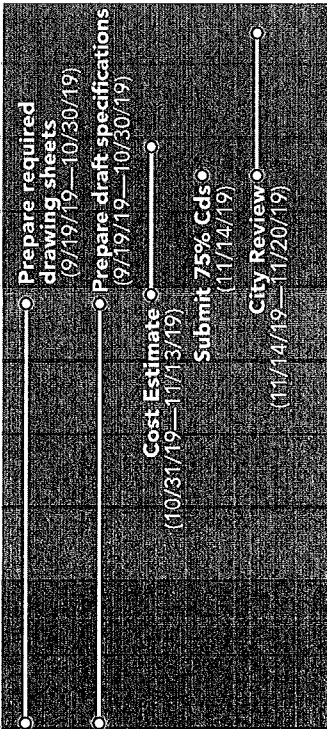
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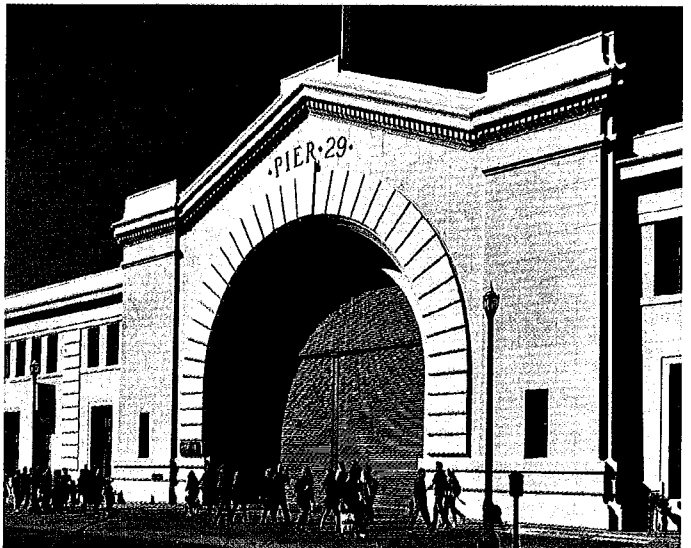
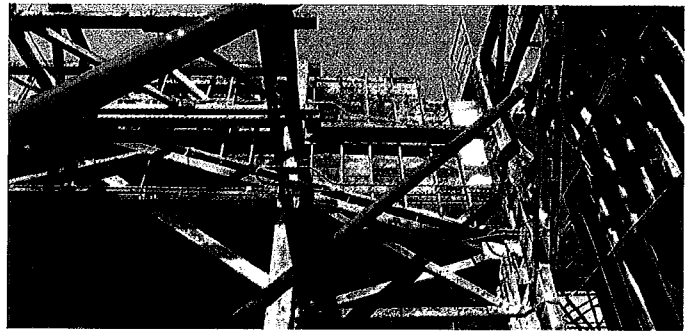
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2020

FEB

MAR



REFERENCE PROJECTS



PORT OF SAN FRANCISCO
PIER 29 FIRE RECONSTRUCTION

LOCATION
 San Francisco, California

CONSTRUCTION COST
 \$15M

DESIGN FEE
 \$187,593

COMPLETION
 2013

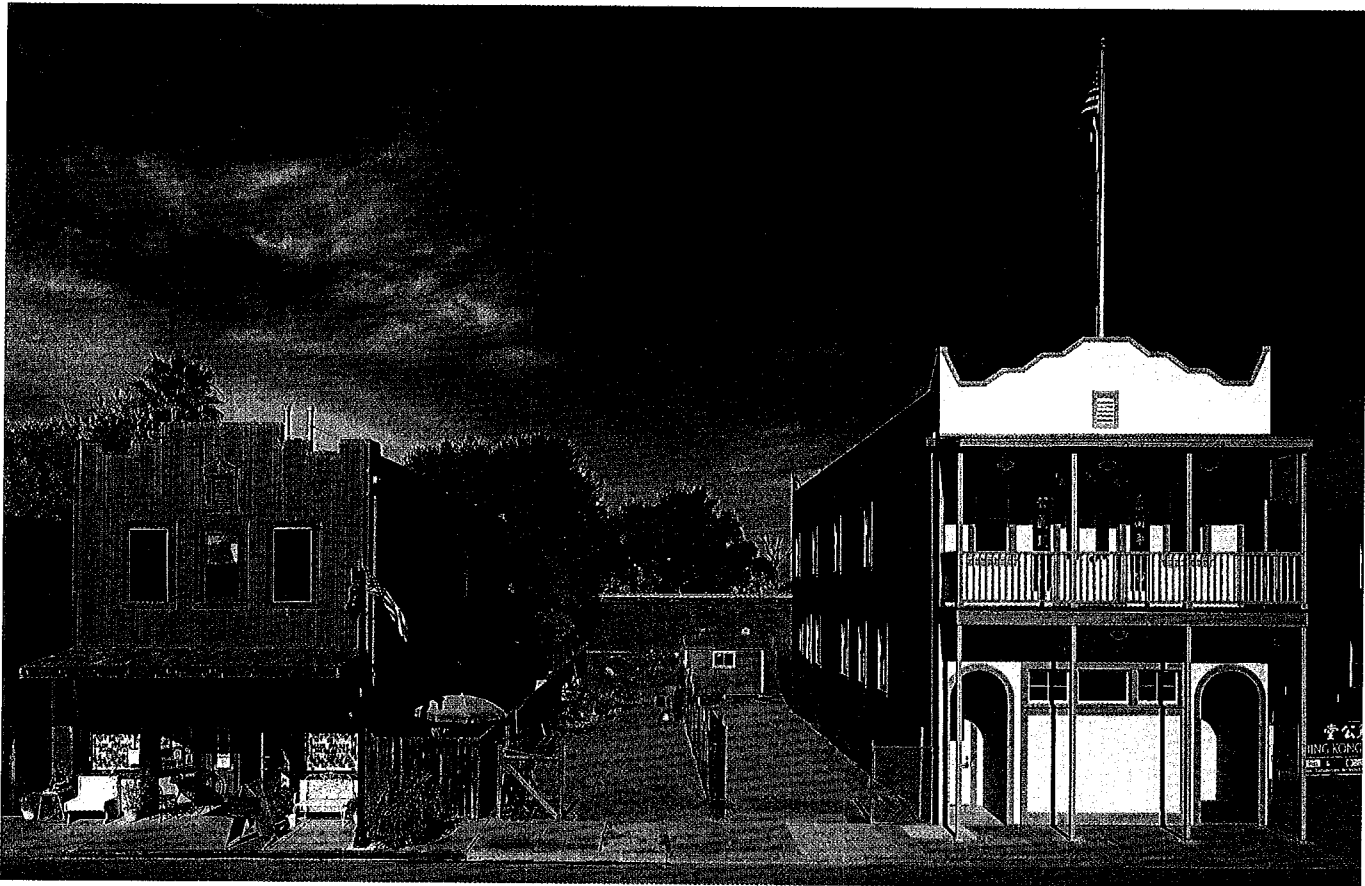
REFERENCE
 Wendy Proctor
 415.274.0400
 wendy.proctor@sfpport.com

Pier 29 is comprised of two parts - a utilitarian Shed constructed in 1917, and a Neo-Classical Bulkhead constructed in 1918. The Bulkhead portion was badly damaged in a fire that struck on June 20, 2012.

TreanorHL served as architect for the fire damage repairs. Our scope included reconstruction of the building envelope including the stucco walls, wood windows, metal roll-up doors and roof; and consultation on interior work for conformance to the Secretary of the Interior's Standards. The reconstruction was completed in April, 2013, in 10 months, and won a Preservation Design Award from the California Preservation Foundation. Total construction cost was approximately \$15 million.

RELEVANT SCOPE

Since the existing roof was completely destroyed by fire, TreanorHL researched original drawings and pre-fire photos to confirm the supporting structure and roof type. Given that the roof was predominately flat, a membrane roof, similar to the roofs found on adjacent pier buildings was used. We also studied the roof drainage systems to make sure that all areas of the roof drained correctly.



ISLETON BRANNA-ANDRUS HISTORICAL SOCIETY
BING KONG TONG REHABILITATION

LOCATION
Isleton, California

CONSTRUCTION COST
\$600,000

DESIGN FEE
\$265,200

COMPLETION
Exterior: 2014
Interior: 2018

REFERENCE
Chuck Hasz
President
Isleton Brannan-Andrus
Historical Society
lwhasz@hotmail.com
818.652.0266

Erected in 1926, this “tong” or meeting hall was a community center organized under a benevolent society. It operated a Chinese language school and offered the local Chinese Americans social services and a place to gather. It was last used during the 1950s and its interior was left virtually unchanged until recently.

TreanorHL successfully assisted the IBAHS in preparing multiple grant applications to fund the rehabilitation. A two-phased project was planned. During phase one, the building was stabilized, the facade was restored, and a seismic retrofit was completed. With a sound envelope in place, phase two started. Construction for the Phase 2 interior rehabilitation has begun and will be completed in 2019. The neighborhood surrounding Bing Kong Tong has seen much revitalization since the façade was restored. Not only did this project bring back an important community building, it also inspired other building owners to take pride in their structures.

RELEVANT SCOPE

The envelope work also involved replacing the roof. When we began the project, the roof was leaking disastrously. Pigeons entered the attic through holes in the roof, and their dung built up to such an extent in the attic that the second floor ceiling was visibly sagging. Both roof cladding and sheathing were replaced, and the trusses supporting the roof were examined and reinforced where necessary. All flashing was also replaced, as was the internal drainage system.



FOREST HILL ASSOCIATION

FOREST HILL CLUBHOUSE REHABILITATION

LOCATION

San Francisco, California

CONSTRUCTION COST

\$600,000

DESIGN FEE

\$139,400

COMPLETION

2013

REFERENCE

John Farrell
Forest Hill Association
415.218.6337
johnfarrell4supervisor@gmail.com

The Forest Hill Clubhouse is a Tudor Revival-style structure, designed by architectural luminary Bernard Maybeck and built in 1919. The building boasts a Great Room with a soaring beamed ceiling, a charming mezzanine, beautifully detailed original woodwork, original light fixtures with mica shades, and some original furniture. The heavily used building – housing everything from weddings to scout meetings - had not had any work done since 1955.

TreanorHL first prepared a master plan, studying ways to make the facility more efficient and safer. We then worked with the community to prioritize the desired scope to meet the available budget. Scope included re-cladding the high gable roof, construction of two new accessible restrooms, the reconfiguration of an original caretakers apartment to provide space for the restrooms, the rehabilitation of the existing kitchen, and the replacement of the non-original wood dance floor in the great room, to match the original. While the building did not receive a full seismic upgrade, a brick wall supporting the roof was reinforced with steel to prevent collapse in a strong earthquake.

RELEVANT SCOPE

The roof replacement involved investigation of the existing condition, as well as research. Originally, the building had a wood shingle roof; however, the most recent roof was asphalt shingle. The wooded neighborhood, with close neighbors on all sides, as well as local building codes, prohibited going back to the original. We therefore selected a low-key asphalt shingle style that was compatible with the building and, while resembling wood did not try too hard to mimic wood. We also installed rigid insulation beneath the shingles and installed new gutters and leaders.



XL CONSTRUCTION
SACRED HEART SCHOOLS

TreanorHL was initially brought in by XL Construction to develop recommendations for repairs to the slate-clad Mansard. The Mansard features ornate dormer windows, most of which suffered some level of deterioration. There was also considerable and ongoing woodpecker damage, and we found that the slate cladding was also in poor condition. Many of the slates were faded, and some were missing or damaged.

RELEVANT SCOPE

TreanorHL first completed an exterior building survey. The entire mansard was surveyed in detail from a boom lift. The exterior masonry was also examined, and deficiencies noted. TreanorHL then prepared construction documents, detailing masonry, carpentry and waterproofing work, including replacing the deteriorated slate cladding in kind. We also researched and documented woodpecker control features, and ultimately netting was installed over most of the dormers.

LOCATION

Atherton, California

CONSTRUCTION COST

\$3.5M

DESIGN FEE

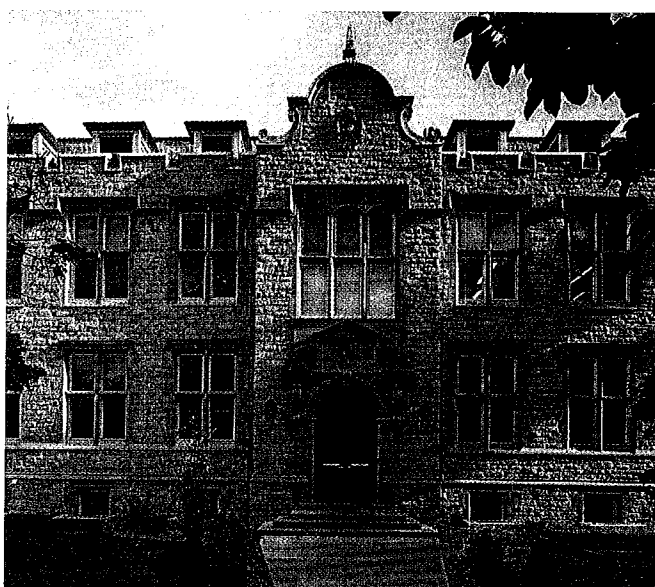
\$70,000 (approx.)

COMPLETION

2014

REFERENCE

Bryant Law
 XL Construction
 blaw@xlconstruction.com
 408.240.6000



UNIVERSITY OF MISSOURI
GWYNN HALL RENOVATION

The goal for the renovation of gothic Gwynn Hall, built in 1920, was to preserve the building's historic character, clean and repair exterior masonry, improve accessibility and building systems, and renovate the interior for modern office, laboratory and classroom space.

RELEVANT SCOPE

The project repaired the slate roof by replacing broken slates and reattaching slates that had slipped. A few more dormers were built to match those already present. The high flat roof and the low part, below the dormers and behind the parapet were leaking, the roofing was replaced with EPDM. Because work above and below the sloped slate roof was undergoing repairs and replacements, we took the opportunity to lift the slates and place ice and water shield at the transitions and low ends of the slopes. Replacement slates were matched to the original slates in size, colorway and texture.

LOCATION

Columbia, Missouri

CONSTRUCTION COST

\$9M

DESIGN FEE

\$813,781

COMPLETION

2013

REFERENCE

Michael Stornello, RA, LEED AP
 Manager, Design Services
 University of Missouri
 stornellom@missouri.edu
 573.884.7146



Scope of Services

As stated in our Work Plan, we understand that the goal of the project is to create a watertight roofing system on the Main House and Carriage House, while at the same time maintaining the integrity of this National Historic Landmark property. Ideally, the new roof will also contribute to the overall purpose of the site, which is to provide public access and education regarding the home and gardens of Luther Burbank and his family. Therefore, historical accuracy is one of our project goals.

For this project, in addition to TreanorHL staff, we have included Pivot Structural Engineering, and Saylor Consulting. We included a structural engineer in case – pending research and discussion with the Luther Burbank Board – slate is considered as a cladding. While slate is beautiful, durable and fireproof, it is also heavier than wood or asphalt shingles. The structural engineer will calculate whether or not the existing structure is able to support slate. Should slate be ruled out as an option for reasons other than weight, we will not need this consultant. Saylor is on the project to prepare the cost estimates.

The project will be divided into four phases: conceptual design, construction documents, permitting and bidding, and construction. Please see the schedules, included in the Work Plan, for additional information pertaining to the order and duration of the tasks, many of which will be performed concurrently.

CONCEPTUAL DESIGN

Kick off meeting: A meeting at the project start is always helpful. This gives everybody the opportunity to meet face-to-face, to discuss access and communication, and to review project goals and schedule. At the same time, we will also consider this as an opportunity for a reconnaissance visit, to review the roofs and determine what we need for our investigation work. We will also collect any additional background information that may be available from the City or the site.

Research: Our schedule allows a two-week period to conduct research. Some of this research will be done at local Santa Rosa or Sonoma County repositories, and some may be done online. This research will inform our material selection.

Physical investigation: The purpose of the investigation is both to examine the construction and any underlying features (such as the original wooden gutter) and to confirm existing

conditions for our roof plan. The HABS drawings provided by the City do not include a roof plan for the Main House, and the roof plan for the Carriage House is inaccurate, as it does not include the cupola. We will want to look at both the top and the underside of the roof, if possible. In looking at the roof, we will review the drainage systems and flashing in addition to the roof cladding.

Create background drawings: These are the base drawings that will be used going forward; therefore, they need to be accurate. We typically use either Revit or AutoCad, depending upon the project. Revit drawings can easily be converted to AutoCad.

Research required permits: We will visit the Building Division to research permitting requirements and review times for the project. We like to do this early in the project to avoid surprises later. We will also research any local requirements for roofing materials.

Prepare concept plans: We will prepare one to three concept plans. The concepts will be 3D illustrated, in color, and will show the roofs with as much site and building context as possible. The roofs will be shown at multiple angles for better understanding of the concepts. Close-up details and material samples will also be provided. These plans will be updated as required based on feedback from the City.

Cultural Heritage Review Board: We understand that review by the Cultural Heritage Board is optional (page 2 of the RFP says "if needed"). We assume that if this is needed, it will occur during this phase, and we have shown it in our schedule. Should this be needed, we will assist the City in preparing and giving a presentation summarizing our design, and the practical and historical rationale behind it. Following this meeting, we will again make any required revisions to our design. We will also go before the Luther Burbank Board, which we assume would occur prior to the Cultural Heritage Review Board meeting. Finally, we will also take the project to the City Council.

Prepare and submit final concept plan: The final conceptual design graphics, in color, will be provided as a PDF for city use.



CONSTRUCTION DOCUMENTS PHASE

This phase will include a 75% and 100% submittal. Each submittal will include drawings, specifications and a cost estimate. After picking up any City comments on our 100% submittal, we will assemble a final bid set which will be submitted to the Building Division for permitting.

75% CDS

Construction drawings: Our initial set will include all required drawings listed in the RFP. The grading and drainage plan, listed as number 5 on page 8 of the RFP, will be included if necessary, but we do not envision any regrading for this project. In addition to the drawings listed, we will also include protection drawings and specifications. These drawings show where and how protection will be required, both for adjacent building elements, and for site features. Protection drawings/specifications will also include provisions for temporarily protecting the buildings from the elements during construction.

Specifications: This phase will also include the preparation of specifications. In addition to all required technical specifications, we will work with the City to prepare Division 1 specifications. Division 1 includes the project's general requirements, which will require more City input than the technical sections. We assume that the City will prepare the construction contract, although we have the ability to prepare an AIA contract as an additional service if that is desired.

Cost Estimate: Our cost estimator, Saylor Consulting, will prepare a 75% cost estimate. We will review it to make sure it is complete prior to submitting. The RFP also asks a general schedule. We assume that this is a construction schedule, and Saylor will prepare that as well. TreanorHL will update the design schedule if needed.

We will assemble, review and coordinate all documents prior to submitting. Three full sets will be provided, as requested in the RFP.

100% CDS

Following the receipt of review comments, we will complete our construction documents. During the final stages of CD preparation, we typically add more details to the drawings, and expand the specifications that were begun during the previous phase. We will complete a thorough quality control review at this time as well, and include an updated cost estimate.

PERMITTING AND BIDDING

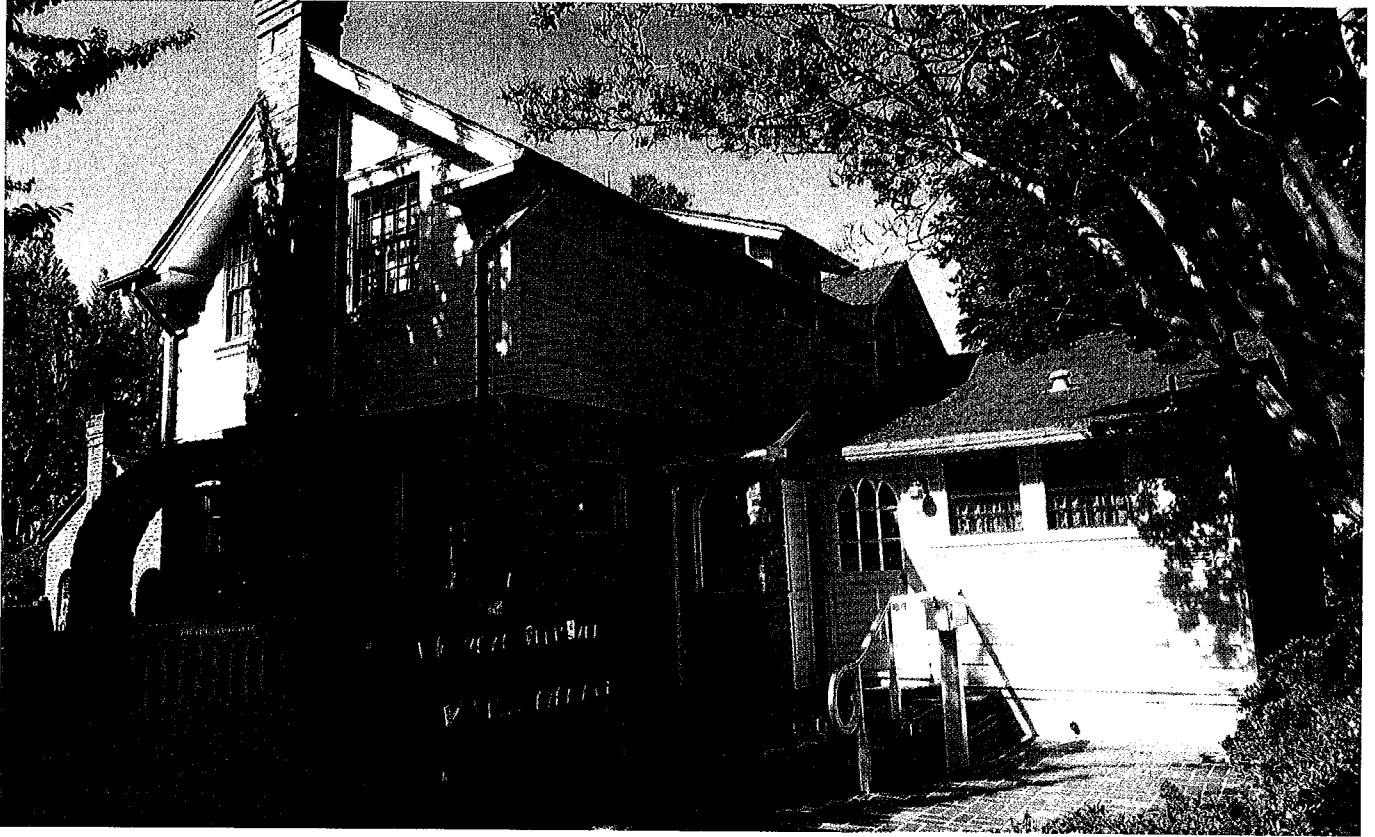
Following city review, we will compile a 100% Bid Set which will go to the City's Building Division for final review and permitting. We will make any revisions necessary to obtain a building permit, and then issue a pdf version and three full-size copies to the Recreation and Parks Department for bidding. We will also submit unlocked AutoCad files for the City's future use.

We will assist the Building Division with bidding as needed. This typically includes attending a bidder walk-through, responding to technical questions from contractors, and assisting in reviewing the bids.

CONSTRUCTION

Our involvement during the construction phase is critical for a successful project. Standard services during construction includes reviewing submittals, responding to contractor's requests for information (RFIs), and reviewing contractor payment requests. We will also make periodic visits to the site to evaluate the progress of the work. These visits are typically weekly but may be more or less frequent depending upon the work. During these visits, we will review and photograph the work-in-progress, consult with the contractor on any issues or unforeseen conditions, and participate in owner-architect-contractor (OAC) meetings, which we understand will be bi-weekly. Each field visit will be followed with a field report.

PROFESSIONAL SERVICES AGREEMENT



Professional Services Agreement

TreanorHL understands and is willing to accept the City's Standard Professional Services Agreement without significant requests to change standard language of the City's insurance requirements.

EXHIBIT B

WITH CULTURAL HERITAGE BOARD MEETING

Luther Burbank House
Santa Rosa, California

TreanorHL
5/13/2019

COST PROPOSAL

	Prin \$315	Proj Mgr \$250	Arch. \$150	Asst. \$125	Hours	Cost
Concept Design						
Kick off meeting/recon	4	4	4		12	\$ 2,860
Research & material review		4	4	16	24	\$ 3,600
Field investigation		8	8		16	\$ 3,200
Create backgrounds		2	16		18	\$ 2,900
Research permits/code requirements		2	2		4	\$ 800
Meet with Luther Burbank Board		4			4	\$ 1,000
Prepare concept plans	1	4	16		21	\$ 3,715
Prepare/present & follow up for CHB	2	8	8		18	\$ 3,830
Present to City Council		6			6	\$ 1,500
Revise concept plan as req'd	1	2	8		11	\$ 2,015
Subtotal:	8	44	66	16	134	\$ 25,420
75% CDs						
Prepare req'd drawing sheets						
Cover sheet		1	2		3	\$ 550
Site plan		1	8		9	\$ 1,450
Protection plans		1	8		9	\$ 1,450
Roof plans (2)		1	16		17	\$ 2,650
Details		1	8		9	\$ 1,450
Draft Specifications	2	4	8		14	\$ 2,830
Coordinate Consultants	1	4			5	\$ 1,315
Meetings		6	6		12	\$ 2,400
Subtotal:	3	19		0	78	\$ 14,095
100% CDs						
Prepare req'd drawing sheets						
cover sheet		1	1		2	\$ 400
site plan		1	4		5	\$ 850
Protection plans		1	4		5	\$ 850
Roof plans (2)		1	16		17	\$ 2,650
Details	2	2	16		20	\$ 3,530
Specifications	4	4	8		16	\$ 3,460
Coordinate Consultants	1	4			5	\$ 1,315
QC review	12				12	\$ 3,780
Meetings		6	6		12	\$ 2,400
Subtotal:	19	20	55		94	\$ 19,235
Bidding & Permitting						
Prep & Issue 100% bid set	1	1	8		10	\$ 1,765
Revise if req'd for permit	1	1	8		10	\$ 1,765
Attend bidder walkthrough		4			4	\$ 1,000
Answer bidder questions (RFIs)		2	2		4	\$ 800
Comment on contractors/assist w/ review		4			4	\$ 1,000
Subtotal:	0	4			4	\$ 6,330

	Prin \$315	Proj Mgr \$250	Arch. \$150	Asst. \$125	Hours	Cost
Construction Administration (assume 3 month project)						
Submittal review		4	8		12	\$ 2,200
Field monitoring (15 field visits)		30	30		60	\$ 12,000
Change orders, RFIs, questions		4	8		12	\$ 2,200
Project Meetings (8)		8	8		16	\$ 3,200
Project closeout	2	4	4		10	\$ 2,230
Subtotal:	2	50	58		110	\$ 21,830

	Fees Subtotal:	\$ 86,910
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Reimbursable Expenses

Reproduction/copying	\$ 2,000
travel (mileage)	\$ 1,000
Reimbursable. Subtotal:	\$ 3,000

	TreanorHL Subtotal:	\$ 89,910
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Consultant Fees

Structural (see below)	\$ -
Cost - estimating and const. scheduling	\$ 10,380.00
Consultant Subtotal:	\$ 10,380

	Project Total:	\$ 100,290
	w/ 10% contingency	\$ 110,319

Optional Consultant fees

Structural (to review for slate)	\$ 7,900
Cost - Conceptual estimate	\$ 2,700

WITHOUT CULTURAL HERITAGE BOARD MEETING

Luther Burbank House
Santa Rosa, California

TreanorHL.
5/13/2019

COST PROPOSAL

	Prin \$315	Proj Mgr \$250	Arch. \$150	Asst. \$125	Hours	Cost
Concept Design						
Kick off meeting/recon	4	4	4		12	\$ 2,860
Research & material review		4	4	16	24	\$ 3,600
Field investigation		8	8		16	\$ 3,200
Create backgrounds		2	16		18	\$ 2,900
Research permits/code requirements		2	2		4	\$ 800
Meet with Luther Burbank Board		4			4	\$ 1,000
Prepare concept plans	1	4	16		21	\$ 3,715
Present to City Council		6			6	\$ 1,500
Revise concept plan as req'd	1	2	8		11	\$ 2,015
Subtotal:	6	36	58	16	116	\$ 21,590
75% CDs						
Prepare req'd drawing sheets						
Cover sheet		1	2		3	\$ 550
Site plan		1	8		9	\$ 1,450
Protection plans		1	8		9	\$ 1,450
Roof plans (2)		1	16		17	\$ 2,650
Details		1	8		9	\$ 1,450
Draft Specifications	2	4	8		14	\$ 2,830
Coordinate Consultants	1	4			5	\$ 1,315
Meetings		6	6		12	\$ 2,400
Subtotal:	3	19		0	78	\$ 14,095
100% CDs						
Prepare req'd drawing sheets						
Cover sheet		1	1		2	\$ 400
Site plan		1	4		5	\$ 850
Protection plans		1	4		5	\$ 850
Roof plans (2)		1	16		17	\$ 2,650
Details	2	2	16		20	\$ 3,530
Specifications	4	4	8		16	\$ 3,460
Coordinate Consultants	1	4			5	\$ 1,315
QC review	12				12	\$ 3,780
Meetings		6	6		12	\$ 2,400
Subtotal:	19	20	55		94	\$ 19,235
Bidding & Permitting						
Prep & Issue 100% bid set	1	1	8		10	\$ 1,765
Revise if req'd for permit	1	1	8		10	\$ 1,765
Attend bidder walkthrough		4			4	\$ 1,000
Answer bidder questions (RFIs)		2	2		4	\$ 800
Comment on contractors/assist w/ review		4			4	\$ 1,000
Subtotal:	2	12	18		32	\$ 6,330

Luther Burbank House
 Santa Rosa, California

TreanorHL.
 5/13/2019

	Prin \$315	Proj Mgr \$250	Arch. \$150	Asst. \$125	Hours	Cost
Construction Administration (assume 3 month project)						
Submittal review		4	8		12	\$ 2,200
Field monitoring (15 field visits)		30	30		60	\$ 12,000
Change orders, RFIs, questions		4	8		12	\$ 2,200
Project Meetings (8)		8	8		16	\$ 3,200
Project closeout	2	4	4		10	\$ 2,230
Subtotal:	2	50	58		110	\$ 21,830

Fees Subtotal:	\$ 83,080
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Reimbursable Expenses

Reproduction/copying		\$ 2,000
Travel (mileage)		\$ 1,000
Reimbursable. Subtotal:		\$ 3,000

TreanorHL Subtotal:	\$ 86,080
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Consultant Fees

Structural (see below)		\$ -
Cost - estimating and const. scheduling		\$ 10,380.00
Consultant Subtotal:		\$ 10,380

Project Total:	\$ 96,460
w/ 10% contingency	\$ 106,106

Optional Consultant fees

Structural (to review for slate)	\$ 7,900
Cost - Conceptual estimate	\$ 2,700