

LODI UNIFIED SCHOOL DISTRICT

REVISION

Rule 7140

New Construction

Selection of Architects

1. Criteria for Selection of an Architect

The following criteria will be used in the evaluation of all architectural firms.

A. All Firms

1. Experience and Training: Qualification as to experience and training as indicated on the Architect's Qualification Form, including State Building Program experience, if applicable.
2. Comparative Project: Size, type and complexity of previous projects compared with the size, type and complexity of known future District projects.
3. Innovative Ability: Creative ability and proven innovation of design as demonstrated by school facilities either completed or presently under construction.
4. Problem Solving: Demonstrated ability to solve difficult problems concerning site or space utilization both aesthetically and economically.
5. Reputation: Recommendations from clients, contractors, and other knowledgeable persons. Ability to work well with district staff.
6. Technical and Artistic Ability: Demonstrated ability, both technical and artistic, as shown by completed projects including quality of working drawings.
7. Organization: Proven ability to assume and carry full responsibility of work to completion. History of firm indicates that the architect initially assigned to a job is rarely replaced.
8. Communication: Proven ability to keep district fully informed as to progress of work both during design and construction phase, including necessary changes during construction. Provides in-person, onsite supervision.

9. Project Schedule: Ability to define and adhere to a realistic design and construction schedule; demonstrated ability to get construction project completed on time.
10. Budget: Ability to design within project/State allowable budget, as appropriate.
11. Change Order: Has a history of minimal change orders. When a change order is necessary, required complete breakdown of labor and material and reviews any credit due district prior to making a recommendation. When appropriate, appears before Board to discuss change orders.
12. As-Builts: Willing to furnish the district with complete as-builts and maintenance and spare parts manuals. Follows through during guarantee period.
13. Consultant Services: Provides qualifications of consultants and length of time during which they have been involved with the architect.
14. Affirmative Action Employment Practices: Shows a willingness to organize the design team to include individuals regardless of race, color, creed, sex, or national origin.
15. Minority, Women and Disabled Veteran-Owned Businesses: For State-funded projects, must be able to demonstrate compliance with State regulations and requirements.

B. Architectural firms who have completed projects for the district

1. Accuracy of Plans: Completeness, clarity, accuracy of plans and specifications, including those provided by the mechanical engineer, civil engineer, electrical engineer, structural engineer, and other consultants.
2. Willingness to Change: Acknowledges the need for additional detail, drawings, specifications, etc., and modifications to plans and documents required to provide the school district with the product desired.

3. District Interest: Diligently protects the district's interest in dealings with the contractor and others.
4. Construction Supervision: Frequently and thoroughly supervises the work along with mechanical engineer, electrical engineer and/or other consultants.
5. Compatibility: Demonstrated ability to "get along" with representatives of the district, the contractor, and State and local agency representatives.
6. Space Meets the Program: Demonstrates an ability and willingness to listen and to learn about the operations of the school in order that the project be functional and facilitate the educational program of the district.
7. Follows Instructions: Demonstrates a willingness to follow instructions, both verbal and written, and to use all guides, standards, specifications and instructions provided by district.
8. Follow-Through: Promptly prepares schedules, expedites change order drawings, responds to requests for information, answers correspondence, etc.
9. Project Management: Demonstrates ability and willingness to ask questions and accept answers, to maintain constant surveillance over the job, and to make recommendations for improvement.
10. Project Personnel: Provides the district with a list of in-house personnel and consultants assigned to the project along with their function and qualifications. Makes a conscientious effort to provide continuity in staffing on project.
11. Budget Limitations: Demonstrates ability to plan within the project budget and notifies the district of any problems before they arise.
12. Correlation of Work: Proven ability to provide complete plans which correlate the architectural, mechanical, electrical, and structural details.
13. Accuracy of As-Builts: Demonstrates ability to provide accurate and complete as-built drawings.

14. Follow-up: Conducts post-occupancy interviews with district representatives to determine how well the project facilitates the program and what improvements could have been made.

II. Architect Selection Procedures

A. Appointed Committee Process

1. Architect Selection Committee: The Superintendent, or designee, will appoint a committee for architectural selection. The committee will consist of the following membership:
 - a. Assistant Superintendent/ designated.
 - b. Assistant Superintendent, Facilities and Planning (chairperson)
 - c. Construction Project Manager
 - d. M & O Representative
 - e. A site administrator (principal)
 - f. A parent
 - g. Such other representation, including employee organizations, as may be appropriate and designated by the Superintendent.
2. Screening Process
 - a. Initial Contact: The Facility Planning Department will solicit and/or formally advertise for qualified firms. A portfolio of architectural firms that have expressed an interest in working for the district will be maintained and updated. This portfolio will provide the initial basis for solicitation by the Facility Planning Department.
 - b. Qualification Form: An Architect's Qualification Form will be mailed to all the architects whose names appear on the architect's list.
 - c. Initial Screening: After thoroughly reviewing the Architect's Qualification Form, together with brochures and information presented by the architect, the Assistant Superintendent, Facilities and Planning and the designated Education Services Assistant Superintendent will screen the list of candidates and reduce the number of architects for further consideration to ten.

- d. Final Screening: The final ten architects will be invited to make presentations before the committee and selected references listed by the architect will be contacted. When possible, some of the committee members may elect to visit some of the schools designed by the candidates. An

Architect's Evaluation Profile, together with the Architect's Evaluation will be used in the evaluation process. The evaluation forms are designed so that each statement has a possible maximum score of five points, rated on a scale ranging from 5 to 0 as follows:

Score

- 5 - Excellent
- 4 - Very Good
- 3 - Good
- 2 - Fair
- 1 - Poor

Each committee member will evaluate each candidate. From these evaluations, the top firms will be recommended for Board approval.

B. Staff Committee Process

1. The Assistant Superintendent, Facilities and Planning, Construction Project Manager, Assistant Superintendent, Education Services and other administrative personnel and/or staff, as deemed appropriate by the nature of the project(s), will constitute the committee.
2. Screening Process
 - a. The committee will review all firms in the portfolio described in II.A.2.a. The Facility Planning Department will solicit or advertise for firms as needed, depending upon the nature of the project and any special requirements, including Disabled Veteran-Owned Business requirements.
 - b. The committee will review the qualifications of the firms and make a recommendation to the Board for assignment of the project or projects.

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Policy

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