

Contract Review Sheet

A&E Standard Prof Svcs Agmnt

BS-4834-22 - Am5Title: MC Evidence Building A&E ServicesContractor's Name: Mackenzie Engineering, Inc.Department: Business Services DepartmentContact: Vanessa KeckAnalyst: Chalyce MacDonaldPhone #: (503) 566-3910Term - Date From: July 22, 2022Expires: June 28, 2026Original Contract Amount: \$ 80,500.00Previous Amendments Amount: \$ 575,917.75Current Amendment: \$ 76,000.00New Contract Total: \$ 732,417.75 Amd% 810%Outgoing Funds ☐ Federal Funds ☐ Reinstatement ☐ Retroactive ☒ Amendment greater than 25%Source Selection Method: 30-0220 Formal Selection A&E

Description of Services or Grant Award

Architectural & engineering services for the design of a new evidence building, to be located at the Marion County Jail Campus.

Amendment 1 adds \$525,955 and Phases 2 thru 7 for schematic and design development services.

Amendment 2 adds \$7,125 for freezer and cooler design services.

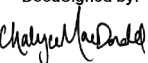
Amendment 3 adds \$1550 for plan modifications requested by County.

Amendment 4 adds \$41,287.75 in consideration of a rate increase due to the significant delay in the project while conducting the Archaeological survey.

Amendment 5 adds \$76,000.00 to the contract value and updates hourly rate schedule.

Desired BOC Session Date: 12/17/2025Contract should be in DocuSign by: 11/26/2025Agenda Planning Date: 12/4/2025Printed packets due in Finance: 12/2/2025Management Update: 12/2/2025BOC upload / Board Session email: 12/3/2025BOC Session Presenter(s) Tamra GoettschCode: Y

REQUIRED APPROVALS

DocuSigned by:

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11/24/2025

Finance - Contracts

Date


Signed by:

60C98A6F708240B...

12/1/2025

Legal Counsel

Date

DocuSigned by:

DC16351248DE4EC...

12/3/2025

Chief Administrative Officer

Date



MARION COUNTY BOARD OF COMMISSIONERS

Board Session Agenda Review Form

Meeting date: 12/17/25

Department: Business Services

Title: Amendment 5 to Evidence Building A&E Contract with Mackenzie Engineering

Management Update/Work Session Date: 12/2/25 Audio/Visual aids ☐

Time Required: 10 min Contact: Tamra Goettsch Phone: x3200

Requested Action: Consider approval of Amendment 5 to add \$76,000.00 to the A&E Professional Services Agreement with Mackenzie Engineering, Inc.

Issue, Description & Background: A&E Design services to support the construction of the Marion County Evidence Building located at 4040 Aumsville Hwy SE, Salem, OR 97317. The building will support the future needs and storage of the Marion County Sheriff Department's evidence.

Financial Impacts: Total cost \$732,417.75 CIP #22-014

Impacts to Department & External Agencies: No impacts to other departments outside of Sheriff's Office, Project coordination to be managed by Business Services

List of attachments: Amendments 5, Exhibit F-Rate Schedule, Previous documents

Presenter: Tamra Goettsch

Department Head Signature: Signed by:
Tamra Goettsch
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MARION COUNTY
STANDARD PROFESSIONAL SERVICES CONTRACT
(Architectural, Engineering, Land Surveying and Related Services)

Amendment #5

This Amendment No. 5 to the Professional Services Contract (as amended from time to time, the “Contract”), dated July 22, 2022, between Marion County, a political subdivision of the State of Oregon, hereafter called County, and Mackenzie Engineering, Inc., hereafter called Consultant.

The Contract is hereby amended as follows (new language is indicated by underlining and deleted language is indicated by ~~striketrough~~):

The not to exceed limit for the completion of this Contract is \$732,417.75 ~~\$656,417.75~~.

The Services are more specifically described in the **EXHIBIT A, Statement of Work**. Owner agrees to pay Consultant a sum not to exceed \$732,417.75 ~~\$656,417.75~~ for performance of the Services, which shall include all allowable expenses. Progress payments shall be made in accordance with **EXHIBIT B, Consultant Compensation**.

Exhibit B - CONSULTANT COMPENSATION

B.1 BASIS OF COMPENSATION

B.1.01 Owner shall compensate Consultant for the performance of Services set forth in Exhibit A, as follows:

Consultant shall perform the Basic & Supplemental Services for: a maximum, not-to-exceed price of \$732,417.75 ~~\$656,417.75~~.

B.1.03

Phase	Percentage	\$ Amount
Programming/Conceptual Design Services - Completed	<u>6.3%</u> 7.0%	\$45,483.00
Schematic Design and Design Development Services – Lump Sum	<u>14.1%</u> 15.7%	\$101,761.00
Energy Trust of Oregon EcoCharette – T&M not to exceed	<u>0.4%</u> 0.4%	\$2,600.00
Construction Documents/Permitting Services – Lump Sum	<u>33.0%</u> 37.0%	\$239,063.00
Class 3 Site Plan Review – T&M not to exceed	<u>3.4%</u> 3.7%	\$24,250.00
Bidding Services, Construction Administration, Record Drawings – T&M not to exceed	<u>40.1%</u> 33.1%	<u>\$290,444.00</u> \$214,444.00
Warranty Period Services	<u>0.7%</u> 0.8%	\$5,000.00
Reimbursable Expenses – T&M not to exceed	<u>2.1%</u> 2.3%	\$15,141.75
Total	100.0%	<u>\$723,742.75</u> \$647,742.75

EXHIBIT F: RATE SCHEDULE

EXHIBIT F: RATE SCHEDULE is updated and replaced in its entirety with the current Rate Schedule attached to this Amendment as Exhibit F.

Except as expressly amended above, all other terms and conditions of the original contract are still in full force and effect. Contractor certifies that the representations, warranties and certifications contained in the original Contract are true and correct as of the effective date of this Amendment and with the same effect as though made at the time of this Amendment.

MARION COUNTY SIGNATURES
BOARD OF COMMISSIONERS:

Chair		Date
Commissioner		Date
Commissioner		Date
Authorized Signature:	<div>Signed by: <i>Tamra Goettsch</i> E4D545951879444...</div>	11/24/2025
	Department Director or designee	Date
Authorized Signature:	<div>DocuSigned by: <i>Jan Fritz</i> DC16351248DE4EC...</div>	12/3/2025
	Chief Administrative Officer	Date
Reviewed by Signature:	<div>Signed by: <i>Scott Norris</i> 60C98A6F708240B...</div>	12/1/2025
	Marion County Legal Counsel	Date
Reviewed by Signature:	<div>DocuSigned by: <i>Cheryl McDonald</i> 2A951B5756514CF...</div>	11/24/2025
	Marion County Contracts & Procurement	Date

MACKENZIE ENGINEERING, INC. SIGNATURE

Authorized Signature:		Date
Title:		

MACKENZIE.

Portland, OR ■ Vancouver, WA ■ Seattle, WA ■ Sacramento, CA

W MACKENZIE.INC

EXHIBIT F: RATE SCHEDULE STANDARD HOURLY BILLING RATE SCHEDULE*

PRINCIPALS \$ 200 – \$ 290

ARCHITECTURE/LANDSCAPE

Design Director	\$ 200 – \$ 260
Senior Project Architect	\$ 205 – \$ 230
Project Architect I – III	\$ 125 – \$ 205
Senior Architectural Designer	\$ 140 – \$ 190
Architectural Designer II-III	\$ 90 – \$ 150
Architectural Designer I	\$ 75 – \$ 95
Designer/Drafter	\$ 70 – \$ 95
Intern	\$ 70 – \$ 80

ENGINEERING

Senior Project Engineer	\$ 200 – \$ 250
Project Engineer I – III	\$ 125 – \$ 225
Designer I – II	\$ 90 – \$ 170
Transportation Analyst I – II	\$ 75 – \$ 125
Designer/Drafter	\$ 90 – \$ 150
Intern	\$ 70 – \$ 80

PLANNING

Senior Project Planner	\$ 200 – \$ 235
Project Planner I – IV	\$ 95 – \$ 200
Permit Coordinator	\$ 60 – \$ 100
Assistant Planner	\$ 85 – \$ 125
Intern	\$ 70 – \$ 80

INTERIOR DESIGN

Senior Project Interior Designer	\$ 190 – \$ 230
Interior Designer III – V	\$ 110 – \$ 180
Interior Designer I – II	\$ 75 – \$ 125
Intern	\$ 70 – \$ 80

ADMINISTRATION

Administrator	\$ 75 – \$ 195
Word Processor	\$ 85 – \$ 100
Graphic Artist	\$ 90 – \$ 135

*Subject to change April 2026

MARION COUNTY STANDARD PROFESSIONAL SERVICES CONTRACT

(Architectural, Engineering, Land Surveying and Related Services)

Amendment #4

This Amendment No. 4 to the Professional Services Contract (as amended from time to time, the “Contract”), dated July 22, 2022, between Marion County, a political subdivision of the State of Oregon, hereafter called County, and Mackenzie Engineering, Inc., hereafter called Consultant.

The Contract is hereby amended as follows (new language is indicated by underlining and deleted language is indicated by ~~striketrough~~):

The not to exceed limit for the completion of this Contract is \$656,417.75 ~~\$615,130.00~~.

The Services are more specifically described in the **EXHIBIT A, Statement of Work**. Owner agrees to pay Consultant a sum not to exceed \$656,417.75 ~~\$615,130.00~~ for performance of the Services, which shall include all allowable expenses. Progress payments shall be made in accordance with **EXHIBIT B, Consultant Compensation**.

Exhibit B - CONSULTANT COMPENSATION

B.1 BASIS OF COMPENSATION

B.1.01 Owner shall compensate Consultant for the performance of Services set forth in Exhibit A, as follows:

Consultant shall perform the Basic & Supplemental Services for: a maximum, not-to-exceed price of \$656,417.75 ~~\$615,130.00~~.

B.1.03




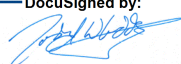
Phase	Percentage	\$ Amount
Programming/Conceptual Design Services - Completed	<u>7.0%</u> 7.5%	\$45,483.00
Schematic Design and Design Development Services – Lump Sum	<u>15.7%</u> 16.8%	\$101,761.00
Energy Trust of Oregon EcoCharette – T&M not to exceed	0.4%	\$2,600.00
Construction Documents/Permitting Services – Lump Sum	<u>37.0%</u> 39.4%	\$239,063.00
Class 3 Site Plan Review – T&M not to exceed	<u>3.7%</u> 4.0%	\$24,250.00
Bidding Services, Construction Administration, Record Drawings – T&M not to exceed	<u>33.1%</u> 28.6%	<u>\$214,444.00</u> \$173,298.00
Warranty Period Services	0.8%	\$5,000.00
Reimbursable Expenses – T&M not to exceed	<u>2.3%</u> 2.5%	<u>\$15,141.75</u> \$15,000.00
Total	100.0%	<u>\$647,742.75</u> \$606,455.00

EXHIBIT F: RATE SCHEDULE

EXHIBIT F: RATE SCHEDULE is updated and replaced in its entirety with the current Rate Schedule attached to this Amendment as Exhibit F.

Except as expressly amended above, all other terms and conditions of the original contract are still in full force and effect. Contractor certifies that the representations, warranties and certifications contained in the original Contract are true and correct as of the effective date of this Amendment and with the same effect as though made at the time of this Amendment.

MARION COUNTY SIGNATURES:

Authorized Signature:	<div>Signed by: </div>	1/23/2025
	<div>E4D543951879444...</div>	
	Department Director or designee	Date
Authorized Signature:	<div>DocuSigned by: </div>	1/28/2025
	<div>DC10351248DE4EC...</div>	
	Chief Administrative Officer	Date
Reviewed by Signature:	<div>DocuSigned by: </div>	1/28/2025
	<div>AFD8EB7C0923416...</div>	
	Marion County Legal Counsel	Date
Reviewed by Signature:	<div>DocuSigned by: </div>	1/23/2025
	<div>E4592AF8CAA542C...</div>	
	Marion County Contracts & Procurement	Date

MACKENZIE ENGINEERING INC. SIGNATURE

Authorized Signature:	<div>DocuSigned by: </div>	2/4/2025
	<div>F21551B9019E4FE...</div>	
		Date

Title: Principal



EXHIBIT F: RATE SCHEDULE

2024 HOURLY BILLING RATE SCHEDULE*

PRINCIPAL: Jeff Humphreys \$ 285

ARCHITECTURE/LANDSCAPE

Project Manager/Project Architect III: Adrienne Linton \$ 185
 Project Architect II: Adam Goldberg \$ 150
 Architectural Designer I: Ashley Fenner \$ 90
 Landscape Architect III: Steven Tuttle \$ 190
 Landscape Architect II: Andrew Jepson-Sullivan \$ 125
 Landscape Architectural Designer I: Craig Helmers \$ 90

STRUCTURAL ENGINEERING

Engineer of Record: David Linton \$ 225
 Project Engineer II: Deanna Kuhlman \$ 205
 Project Engineer II: Tom Kay \$ 190
 Structural Designer II: Andrew Hodge \$ 140
 Structural Drafter: varies based on availability \$ 85 – \$ 150

CIVIL ENGINEERING

Engineer of Record: Greg Mino \$ 225
 Project Engineer II: Bailey Currier \$ 160
 Civil Designer II: Josh Mathieson \$ 135
 Civil Designer I: Ethan Ramirez \$ 105

MECHANICAL/ELECTRICAL/PLUMBING

Senior Principal/Principal in Charge: Steve Dacus \$ 280
 Electrical Engineer, Principal: Cody Bargholz \$ 260
 Electrical Designer, Associate: Jason Matheis \$ 175
 Mechanical Engineer, Associate: Jason Sullivan \$ 175
 Plumbing Designer: Scott Lamadore \$ 175
 Technology Designer, Associate Principal: Todd Schenbeck \$ 240
 Sr. Fire Protection Engineer: Ethan Brown \$ 200
 Fire Alarm Designer, Sr. Designer: Jarod Myrick \$ 200
 Revit Drafter: David Horger \$ 145
 Administrative Support: Laura Kirby \$ 125
 Administrative Support: Amy Cathcar \$ 125

PLANNING

Project Planner IV: Brian Varricchione \$ 195
 Project Planner II: Sid Hariharan \$ 145



INTERIOR DESIGN

Interior Designer IV: Dina Radzwillowicz	\$ 175
Interior Designer III: Beth Lundgreen	\$ 135

ADMINISTRATION

Administrator: varies based on availability	\$ 75 – \$ 195
Word Processor: varies based on availability	\$ 85 – \$ 115

*Subject to change April 2025 and April 2026





REIMBURSABLE CHARGES

Mackenzie will charge the following standard, cost-based rates for in-house reimbursable items listed below:

IN-HOUSE PRINTING

Scanning – Black & White

Small Format: \$0.25/sheet
(8-1/2 x 11 - 11 x 17)

Large Format: \$1.00/sheet
(Including Half Size)

Scanning – Color

Small Format: \$0.50/sheet
(8-1/2 x 11 - 11 x 17)

Large Format: \$3.00/sheet
(Including Half Size)

Printing/Copying – All Sizes

Black & White: \$0.21/sq. ft.
Full Color: \$4.00/sq. ft.

Fax

Local: \$1.00/sheet
Long distance: \$1.30/sheet

OTHER IN-HOUSE REIMBURSABLE ITEMS

Check Generation Fee

\$25.00

Automobile Mileage

Billed according to IRS guidelines

Delivery Service

Fixed rates: \$7.75 to \$54.40
(depending on mileage)

Data Supplies

CD documentation: \$15.00
DVD documentation: \$30.00

Report Binder

Without tabs: \$3.00/book
With tabs: \$4.00/book

Foamcore:

\$4.25/sheet



MARION COUNTY
STANDARD PROFESSIONAL SERVICES CONTRACT
(Architectural, Engineering, Land Surveying and Related Services)

Amendment #3

This Amendment No. 3 to the Professional Services Contract (as amended from time to time, the “Contract”), dated July 22, 2022, between Marion County, a political subdivision of the State of Oregon, hereafter called County, and Mackenzie Engineering, Inc., hereafter called Consultant.

The Contract is hereby amended as follows (new language is indicated by underlining and deleted language is indicated by ~~striketrough~~):

The not to exceed limit for the completion of this Contract is \$615,130.00 ~~\$613,580.00~~.

The Services are more specifically described in the **EXHIBIT A, Statement of Work**. Owner agrees to pay Consultant a sum not to exceed \$615,130.00 ~~\$613,580.00~~ for performance of the Services, which shall include all allowable expenses. Progress payments shall be made in accordance with **EXHIBIT B, Consultant Compensation**.

EXHIBIT A - STATEMENT OF WORK

PROJECT DESCRIPTION: Architectural and engineering services in support of the Project described above. The County is awarding additional phases to Contractor after the successful completion of Conceptual Design phase. Additional phases include: schematic design, design development, construction documents, bidding services, construction contract administration and supplemental services, (Phase 2 through Phase 7) as described in Attachment 1 – Professional Services Proposal (Revised February 7, 2023), ~~and~~ Attachment 2 – Additional Services Proposal – Freezer and Cooler Design (Dated August 7, 2023), and Attachment 3 – Additional Service Agreement (Dated November 9, 2023).

Exhibit B - CONSULTANT COMPENSATION

A.1 BASIS OF COMPENSATION

A.1.01 Owner shall compensate Consultant for the performance of Services set forth in Exhibit A, as follows:

Consultant shall perform the Basic & Supplemental Services for: a maximum, not-to-exceed price of \$615,130.00 ~~\$613,580.00~~.

A.1.04 All Supplemental Services (See Exhibit A, Section A.7), while included in the above-stated maximum not to exceed amount, are considered Services to be provided on an “as needed” basis and will be performed only if authorized by Owner in writing. The authorization of the Supplemental Services is not restricted by the Basic Services schedule. It is the goal of the Parties to agree upon a fixed price for any Supplemental Service for which the actual scope of Service can be defined and agreed upon. The price for each Supplemental Service shall, at Owner’s sole discretion, be a fixed price agreed upon by the Parties and documented by Contract amendment prior to authorization to proceed with the Service. If a fixed price cannot be agreed upon, the price shall be the not to exceed amount indicated below for that Supplemental Service (as those amounts may be revised in accordance with this Section B.1.04) derived from Consultant’s personnel time to complete the Service, multiplied by the hourly rates for

those personnel as set forth in EXHIBIT F Rate Schedule. The estimated dollar amounts for each of the Supplemental Services listed below, are stated for the purpose of calculating the maximum total dollar amount for all Supplemental Services. It is understood that the actual amount payable for each Supplemental Service may be more or less than the estimate below, however, the total amount of all Supplemental Services shall not exceed the maximum, not-to-exceed price stated in Section B.1.01 for Supplemental Services without a Contract amendment. The estimated not to exceed amounts for the identified Supplemental Services are as follows:

Supplemental Service	\$ Amount
Design and Implementation of the Walk-In Cooler and Freezer – Lump Sum	\$7,125.00
<ul style="list-style-type: none"> • <u>Modify the Deputy Processing Room #118 Island to include open storage with adjustable shelving on one side of the island.</u> • <u>Consultant will review County proposed modifications to the Class III Plan Review Narrative. Where necessary, Consultant will update the revised language and finalize it before sending it back to County. No drawing nor exhibit updates are included in this supplemental service.</u> 	\$1,550.00
Total	<u>\$8,675.00</u> <u>\$7,125.00</u>

Except as expressly amended above, all other terms and conditions of the original contract are still in full force and effect. Contractor certifies that the representations, warranties and certifications contained in the original Contract are true and correct as of the effective date of this Amendment and with the same effect as though made at the time of this Amendment.

MARION COUNTY SIGNATURES:

Authorized Signature: DocuSigned by:
Tamra Goettsch 1/23/2024
E4D545951879444...
 Department Director or designee Date

Authorized Signature: DocuSigned by:
Jan Fritz 1/25/2024
DC16351248DE4EC...
 Chief Administrative Officer Date

Reviewed by Signature: DocuSigned by:
John Pettifer 1/23/2024
AFD8EB7C0923416...
 Marion County Legal Counsel Date

Reviewed by Signature: DocuSigned by:
[Signature] 1/23/2024
A3538E7AEC704F4...
 Marion County Contracts & Procurement Date

MACKENZIE ENGINEERING INC. SIGNATURE

Authorized Signature: DocuSigned by:
[Signature] 1/26/2024
F24561B9049E4FE...
 Date

Title: Principal

MARION COUNTY STANDARD PROFESSIONAL SERVICES CONTRACT

(Architectural, Engineering, Land Surveying and Related Services)

Amendment #2

This Amendment No. 2 to the Professional Services Contract (as amended from time to time, the “Contract”), dated July 22, 2022, between Marion County, a political subdivision of the State of Oregon, hereafter called County, and Mackenzie Engineering, Inc., hereafter called Consultant.

The Contract is hereby amended as follows (new language is indicated by underlining and deleted language is indicated by ~~striketrough~~):

The not to exceed limit for the completion of this Contract is \$613,580.00 ~~\$606,455.00~~.

The Services are more specifically described in the **EXHIBIT A, Statement of Work**. Owner agrees to pay Consultant a sum not to exceed \$613,580.00 ~~\$606,455.00~~ for performance of the Services, which shall include all allowable expenses. Progress payments shall be made in accordance with **EXHIBIT B, Consultant Compensation**.

EXHIBIT A - STATEMENT OF WORK

PROJECT DESCRIPTION: Architectural and engineering services in support of the Project described above. The County is awarding additional phases to Contractor after the successful completion of Conceptional Conceptual Design phase. Additional phases include: schematic design, design development, construction documents, bidding services, construction contract administration and supplemental services, (Phase 2 through Phase 7) as described in Attachment 1 – Professional Services Proposal (Revised February 7, 2023), and Attachment 2 – Additional Services Proposal – Freezer and Cooler Design (Dated August 7, 2023).

Exhibit B - CONSULTANT COMPENSATION

A.1 BASIS OF COMPENSATION

A.1.01 Owner shall compensate Consultant for the performance of Services set forth in Exhibit A, as follows:

Consultant shall perform the Basic & Supplemental Services for: a maximum, not-to-exceed price of \$613,580.00 ~~\$606,455.00~~.

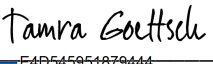
A.1.04 ~~RESERVED~~ All Supplemental Services (See Exhibit A, Section A.7), while included in the above-stated maximum not to exceed amount, are considered Services to be provided on an “as needed” basis and will be performed only if authorized by Owner in writing. The authorization of the Supplemental Services is not restricted by the Basic Services schedule. It is the goal of the Parties to agree upon a fixed price for any Supplemental Service for which the actual scope of Service can be defined and agreed upon. The price for each Supplemental Service shall, at Owner’s sole discretion, be a fixed price agreed upon by the Parties and documented by Contract amendment prior to authorization to proceed with the Service. If a fixed price cannot be agreed upon, the price shall be the not to exceed amount indicated below for that Supplemental Service (as those amounts may be revised in accordance with this Section B.1.04) derived from Consultant’s personnel time to complete the Service, multiplied by the hourly rates for those personnel as set forth in EXHIBIT F Rate Schedule. The estimated dollar amounts for each of the Supplemental Services listed below, are stated for the purpose of calculating the maximum total dollar amount for all Supplemental Services. It is understood that the actual amount

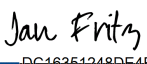
payable for each Supplemental Service may be more or less than the estimate below, however, the total amount of all Supplemental Services shall not exceed the maximum, not-to-exceed price stated in Section B.1.01 for Supplemental Services without a Contract amendment. The estimated not to exceed amounts for the identified Supplemental Services are as follows:


Supplemental Service	\$ Amount
Design and Implementation of the Walk-In Cooler and Freezer – Lump Sum	\$7,125.00
Total	<u>\$7,125.00</u>

Except as expressly amended above, all other terms and conditions of the original contract are still in full force and effect. Contractor certifies that the representations, warranties and certifications contained in the original Contract are true and correct as of the effective date of this Amendment and with the same effect as though made at the time of this Amendment.

MARION COUNTY SIGNATURES:

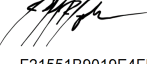
Authorized Signature:  12/18/2023
DocuSigned by: E4D545951879444...
 Department Director or designee Date

Authorized Signature:  12/19/2023
DocuSigned by: DC16351248DE4EC...
 Chief Administrative Officer Date

Reviewed by Signature:  12/19/2023
DocuSigned by: AFD8EB7C0923416...
 Marion County Legal Counsel Date

Reviewed by Signature:  12/18/2023
DocuSigned by: E4592AF8CAA542C...
 Marion County Contracts & Procurement Date

MACKENZIE ENGINEERING INC. SIGNATURE

Authorized Signature:  12/19/2023
DocuSigned by: F21551B9010E4FE...
 Date

Title: Principal

REQUEST FOR AUTHORIZATION OF CONTRACT BS-4834-22

Date: April 3, 2023
To: Chief Administrative Officer
Cc: Contract File
From: Vanessa Keck

I. Subject: Amendment Exceeds 25%

DIPS CODE: 455-80-81-808-8084-534100-080396

Budget Authority: ☒ Yes ☐ No,

CIP: 22-014

The Marion County Business Services Department is requesting approval to amend a contract as described in Section 20-0265, 20-0270, 30-0320, 40-0160, and 40-0910 of the Marion County Public Contracting Rules. The contract is with Mackenzie Engineering, Inc. for Marion County Evidence Building A&E Services with a value of [\$80,500.00] and an additional [\$525,955.00] will be added to the contract for a new contract total of \$606,455.00 upon approval.

A. BACKGROUND

The initial contract consisted of \$80,500.00 which was reserved for Programming and Conceptual Design Services for Phase 1 of this project. Subsequent phases of work are awarded to the consultant as the project progresses. This conforms to the contracting plan for this project.

B. CURRENT AMENDMENT PURPOSE

Amendment No. 1 adds schematic design and design development services, Energy Trust of Oregon EcoCharette, construction documents and permitting services, Class 3 site plan review, bidding services, construction administration and record drawings, warranty period services and reimbursable expenses.

C. JUSTIFICATION

The initial contract consisted of \$80,500.00, which enabled work on this project to begin. Amendment 1 added an additional amount of \$525,955.00 for a contract total of \$606,455.00. Amendment 1 conforms to the Request for Proposal and awarded contract phased approach and conforms to the contracting plan for this project.

D. BUDGET IMPACTS

1. Are the expected expenditures for the current fiscal year under the contract, including any additional funds being requested with this action, already included in the current year adopted budget? ☒ Yes ☐ No
2. If yes, amount \$5,100,000.00 Program / Account 808-534100

3. If no, describe the amount and how the anticipated expenditures will be handled within the budget:

a. Amount: \$ _____

b. Managed with anticipated savings– explain why and from what costing:

c. Will require a supplemental budget request – provide the expected funding source and costing:

i. Funding Source: _____

ii. Costing: _____

Submitted by:

Vanessa Keck

Vanessa Keck
Business Services Department

Reviewed by:

DocuSigned by:
Camber Schlag

C5B2F3DE257E444
Contracts & Procurement

Acknowledged by:

DocuSigned by:
Tamra Goettsch

E4D545951879444...
Department Head

Acknowledged by:

DocuSigned by:
Jan Fritz

DC16351248DE4EC...
Jan Fritz, CAO

MARION COUNTY
STANDARD PROFESSIONAL SERVICES CONTRACT
(Architectural, Engineering, Land Surveying and Related Services)

Amendment #1

This Amendment No. 1 to the Professional Services Contract (as amended from time to time, the "Contract"), dated July 22, 2022 between Marion County, a political subdivision of the State of Oregon, hereafter called County, and Mackenzie Engineering, Inc., hereafter called Consultant.

The Contract is hereby amended as follows (new language is indicated by underlining and deleted language is indicated by brackets):

(the "Consultant") (collectively Owner and Consultant are referred to as the "Parties"). This Contract is for all Services related to completion of the project more particularly described as follows (the "Project"):

New Marion County Evidence Building construction to be located at Marion County Jail Campus, 4000 Aumsville Highway SE, Salem, Oregon.

[The maximum not to exceed for Phase 1 of this Contract is \$80,500.00]. The not to exceed limit for the completion of this Contract is \$606,455.00.

This Contract shall become effective on the date that the Contract is fully executed by the Parties and all required Marion County approvals have been obtained (the "Effective Date"). No Services shall be performed prior to the Effective Date. The Contract shall expire, unless otherwise terminated or extended, on [June 28, 2024] June 28, 2026.

The Services are more specifically described in the **EXHIBIT A, Statement of Work**. Owner agrees to pay Consultant a sum not to exceed [\$80,500.00] \$606,455.00 for performance of the Services, which shall include all allowable expenses. Progress payments shall be made in accordance with **EXHIBIT B, Consultant Compensation**.

Except as expressly amended above, all other terms and conditions of the original contract are still in full force and effect. Contractor certifies that the representations, warranties and certifications contained in the original Contract are true and correct as of the effective date of this Amendment and with the same effect as though made at the time of this Amendment.

**MARION COUNTY SIGNATURE
BOARD OF COMMISSIONERS:**

Columbillo 4/26/2023
Chair Date

Kim Cameron 4.26.2023
Commissioner Date

Not Present At Meeting

Commissioner Date

DocuSigned by:
Authorized Signature: Tamra Goettsche 4/11/2023
E4D545951879444...

Department Director or designee Date

DocuSigned by:
Authorized Signature: Jan Fritz 4/18/2023
DC16351248DE4EC...

Chief Administrative Officer Date

DocuSigned by:
Reviewed by Signature: Jane E. Vetto 4/12/2023
D0CF5B04B9F483...

Marion County Legal Counsel Date

DocuSigned by:
Reviewed by Signature: Camber Schlag 4/10/2023
C5B2F3DF257F444...

Marion County Contracts & Procurement Date

MACKENZIE ENGINEERING INC. SIGNATURE

DocuSigned by:
Authorized Signature: [Signature] 5/11/2023
F21554B9049E4FE...

Date

Title: Principal

**MARION COUNTY
STANDARD PROFESSIONAL SERVICES CONTRACT**

EXHIBIT A - STATEMENT OF WORK

PROJECT DESCRIPTION: Architectural and engineering services in support of the Project described above. [Specific services may include, but not be limited to: programming/conceptual design phase, (Phase 1). [The County may award additional phases to Contractor after completing programming/conceptual design phase.] The County is awarding additional phases to Contractor after the successful completion of Conceptional Design phase. Additional phases [shall may] include: schematic design, design development, construction documents, bidding services, construction contract administration and supplemental services, (Phase 2 through Phase 7) as described in Attachment 1 – Professional Services Proposal (Revised February 7, 2023).

Representatives of the Parties for this Contract and the Project are:

Consultant: Jeff Humphreys

Telephone: 971-346-3769

Owner: [Colleen Coons-Chaffins] Tamra Goettsch Telephone: [503-373-4426] 503-589-3200

The Services that Consultant shall perform for each phase of the Project are described below:

A.1 PHASE 1 - BASIC SERVICES - PROGRAMMING / CONCEPTUAL DESIGN SERVICES

During the programming phase, Consultant shall provide those Basic Services necessary to refine programming, site related limitations and general requirements for the Project. Some of the described Services will be provided during this activity phase and some during other phases of Project design. Consultant's Services during Phase 1 shall consist of the following:

- A.1.01 PROGRAMMING Services. Consultant shall confirm and refine the program information already developed for the Project, detailing the space needs, dimensions, interrelationships, and special requirements such as telecommunications systems, access control, standby power, and security for each area of the new facility. Consultant shall gather information from Owner and Project stakeholders to identify requirements, problems, issues, expectations, and concerns, as well as Project goals. The programming information developed by Consultant shall include, but is not limited to, a list of spaces, their sizes, activities, hours of use, finishes, equipment, furniture and systems, and a brief narrative describing the relationship between spaces. Consultant shall prepare a refined program report, in an 8 1/2" X 11" format and with any drawings attached and in an 11" X 17" format, for presentation to and approval by Owner.

- A.1.02 **SITE DEVELOPMENT PLANNING Services.** Consultant shall provide preliminary site development planning Services including, but not limited to, providing an executive summary, a building analysis, and a comparative evaluation of conceptual site development designs, based on: land utilization; structures placement; facilities development; movement systems, circulation and parking; utilities and Project description; preliminary systems descriptions; code review; master plan provisions; Owner requirements; subsurface conditions; ecological requirements; and landscape concepts.
- A.1.03 **NEEDS ANALYSIS Services.** Consultant shall gather information from Owner and Project stakeholders to identify requirements, problems, issues, expectations, concerns, as well as Project goals. The programming information shall include but is not limited to a list of spaces, their sizes, activities, hours of use, finishes, equipment, furniture and systems, and a brief narrative describing the relationship between spaces.
- A.1.04 **ARCHITECTURAL SPACE PLANNING Services.** Consultant shall provide diagrams showing functional relationships of the various program areas of the Project. Consultant shall provide an efficiency analysis of the programmed space needs.
- A.1.05 **ON-SITE UTILITY STUDIES Services.** Consultant shall establish requirements and prepare initial designs for on-site utilities required for the Project.
- A.1.06 **OFF-SITE UTILITY STUDIES Services.** Consultant shall determine the requirements for Project connections to required utilities.
- A.1.07 **STATEMENT OF PROBABLE CONSTRUCTION COST Services.** Consultant shall develop a probable construction cost range, +/- 20%, for the Project (the "Programming Design Phase Statement of Probable Construction Cost") based on the most recent programming information. Consultant shall arrange the costs of constituent elements in the "Construction Specification Institute" ("CSI") format and shall include the costs of systems, assemblies, and functional areas.

**A.2 PHASE 2 - BASIC SERVICES - SCHEMATIC DESIGN SERVICES -
[RESERVED]**

In the schematic design phase, from the Owner-approved programming information, Consultant shall provide those Basic Services necessary to prepare schematic design documents consisting of drawings and other documents illustrating the general scope, scale, and relationship of Project components (the "Schematic Design Documents") for acceptance by Owner. Designs will be conceptual in character and based on program requirements provided by Owner. Consultant's Services during Phase 2 shall consist of the following:

- A.2.01 ARCHITECTURAL DESIGN/DOCUMENTATION Services. Consultant shall respond to program requirements and prepare: conceptual building plans; preliminary

sections and elevations; and development of approximate dimensions, areas and volumes. These Services shall also include the following:

- a. Single-line drawings showing complete building layout, identifying the various major areas, core areas and their relationships.
- b. Identification of all proposed finishes (includes all exterior surfaces, doors, and windows).

A.2.02 STRUCTURAL DESIGN/DOCUMENTATION Services. Consultant shall recommend basic structural materials and systems, analyses, and develop conceptual design solutions for a primary structural system and alternate structural systems. These Services shall also include the following:

- a. Structural systems layout with overall dimensions and floor elevations. Identification of structural system (pre-cast, structural steel with composite deck, structural steel with bar joists, etc.).
- b. Identification of foundation requirements (fill requirements, piles, caissons, spread footings, etc.).

A.2.03 MECHANICAL DESIGN/DOCUMENTATION Services. Consultant shall consider alternate materials, systems and equipment and develop conceptual design solutions for: energy sources; energy conservation; heating and ventilating; air conditioning; plumbing; fire protection; and general space requirements necessary to allow for installation and utilization. These Services shall also include the following:

- a. Block heating, ventilating and cooling load calculations including envelope and internal loads.
- b. Minimum of two HVAC systems that appear compatible with loading conditions for subsequent life-cycle costing.
- c. Single-line drawings of all mechanical equipment spaces, duct chases and pipe chases.
- d. Location of all major equipment in allocated spaces.

A.2.04 ELECTRICAL DESIGN/DOCUMENTATION Services. Consultant shall respond to program requirements, recommend basic electrical materials and systems, analyses, and develop conceptual design solutions for: lighting; electrical; security and telecommunications systems. These Services shall also include the following:

- a. An illumination plan showing estimated quantity of light from all sources and for all areas. Incorporation of daylight strategies to minimize artificial lighting. Recommendations for types and quantities of fixtures to be used.
- b. Major electrical equipment roughly scheduled indicating size and capacity.

- c. Complete preliminary one-line electrical distribution diagrams with indications of final location of service entry, switchboards, motor control centers, panels, transformers, and onsite power generator.
 - d. Legend showing all symbols used on drawings.
- A.2.05 CIVIL DESIGN/DOCUMENTATION Services. Consultant shall consider alternate materials and systems and develop conceptual design solutions for on-site utility systems and fire protection systems.
- A.2.06 MATERIALS RESEARCH/SPECIFICATIONS Services. Consultant shall: identify potential architectural materials, systems, and equipment, including their criteria and quality standards, which are consistent with the conceptual design; investigate availability and suitability of alternative architectural materials, systems and equipment; and coordinate similar activities of other disciplines. Consultant shall include research for less toxic materials that provide safer alternatives for people and the building environment.
- A.2.07 INTERIOR DESIGN Services. From the approved “Needs Analysis,” Consultant shall provide interior space planning based on functional relationships, code requirements, finishes, colors, systems, furniture, and equipment. Consultant shall integrate interior space planning with conceptual design solutions for architectural, structural, mechanical, electrical and equipment requirements in order to establish an integrated design approach for a fully functional and coordinated building environment. Consultant shall obtain design input from Owner. The space plan shall include the number and location of all workstations and office layouts, loose furniture, special equipment, high density filing systems, and other rooms. Consultant shall perform these Services within the constraints of the proposed furniture system, taking into account panel dimensions and standards to provide basic workstation layouts that provide block dimensions.
- A.2.08 PROJECT DEVELOPMENT SCHEDULING Services. Consultant shall update the Critical Date Schedule as previously established.
- A.2.09 STATEMENT OF PROBABLE CONSTRUCTION COST Services. Consultant shall develop a probable construction cost range, +/- 20%, for the Project (the “Schematic Design Phase Statement of Probable Construction Cost”) based on the most recent schematic design studies, current area, volume, or other unit costs, and expected Project contingencies and consistent with the construction cost budget.

**A.3 PHASE 3 - BASIC SERVICES - DESIGN DEVELOPMENT SERVICES –
[RESERVED]**

In the design development phase Consultant shall provide those Basic Services necessary to prepare, from the Owner-approved Schematic Design Documents, the design

development documents consisting of drawings and other documents to fix and describe the size and character of the entire Project, including architectural, structural, mechanical, electrical, and other systems, materials and such other elements as may be appropriate (the "Design Development Documents"). Consideration shall be given to availability of materials, equipment and labor, construction sequencing and scheduling, economic analysis of construction and operations, Owner's safety and maintenance requirements, sustainability and energy conservation. Outline specifications shall be prepared in accordance with the Construction Specification Institute standards and shall include, but not be limited to, general and product information. Consultant's Services during Phase 3 shall consist of the following:

- A.3.01 ARCHITECTURAL DESIGN/DOCUMENTATION Services. On an ongoing basis, Consultant shall develop and expand architectural Schematic Design Documents to establish the scope, relationship, forms, size and appearance of the Project through: plans, sections and elevations; typical construction details; and equipment layouts. These Services shall also include the following:
- a. Floor plans with final room locations including all openings.
 - b. Building sections showing coordination and relationship between components.
 - c. Wall sections showing final dimensional relationships, materials, and component relationships.
 - d. Identification of all fixed and loose equipment to be installed.
 - e. Finish schedule identifying all finishes.
 - f. Door and hardware schedule showing final quantity plus type and quality levels.
 - g. Site plan, including grading and drainage.
 - h. Preliminary development of details and large-scale blow-ups.
 - i. Legend showing all symbols used on the drawings.
 - j. Outline specifications, in accordance with the CSI standards.
 - k. Reflected ceiling development including ceiling grid and all devices that penetrate ceiling (i.e., light fixtures, sensors, sprinkler heads, ceiling register or diffusers, etc.).
- A.3.02 STRUCTURAL DESIGN/DOCUMENTATION Services. On an ongoing basis, Consultant shall develop the specific structural system(s) and Schematic Design Documents in sufficient detail to establish: basic structural system and dimensions; final structural design criteria; foundation design criteria; preliminary sizing of additional major structural components; critical coordination clearances; and outline specifications or materials lists. These Services shall also include the following:
- a. Plan drawings with all structural members located and sized.

- b. Footing, beam, column, and connection schedules.
 - c. Final building elevations.
 - d. Outline specifications.
 - e. Foundation drawings.
- A.3.03 MECHANICAL DESIGN/DOCUMENTATION Services. On an ongoing basis, Consultant shall develop and expand mechanical Schematic Design Documents and develop outline specifications or materials lists to establish: approximate equipment sizes and capabilities; preliminary equipment layouts; required space for equipment; required chases and clearances; acoustical and vibration control; visual impacts; and energy conservation measures. These Services also include the following:
- a. Heating and cooling load calculations for each space and major duct or pipe runs sized to interface with structural elements.
 - b. Major mechanical equipment scheduled indicating size and capacity.
 - c. Duct work and piping systems substantially located and sized.
 - d. Devices in ceiling located.
 - e. Legend showing all symbols used on the drawings.
 - f. Outline specifications.
- A.3.04 ELECTRICAL DESIGN/DOCUMENTATION Services. On an ongoing basis, Consultant shall develop and expand electrical Schematic Design Documents and develop outline specifications or materials lists to establish: criteria for lighting, electrical, security and telecommunications systems; approximate sizes and capacities of major components; preliminary equipment layouts; required space for equipment; and required chases and clearances. These Services also include the following:
- a. All power consuming equipment and load characteristics.
 - b. Total electrical load.
 - c. Major electrical equipment (switchgear, distribution panels, emergency generator, transfer switches, UPS system, etc.) dimensioned and drawn to scale into the space allocated.
 - d. Complete preliminary site lighting design.
 - e. Outline specifications.
 - f. Lighting, power, telecommunications and office automation devices and receptacles shown on the plan.
 - g. Final light fixture schedule.
 - h. Interior electrical loads estimate for systems furniture, receptacles, lighting, food service equipment, and any other special use areas.

- A.3.05 CIVIL DESIGN/DOCUMENTATION Services. On an ongoing basis, Consultant shall develop and expand civil Schematic Design Documents and develop outline specifications or materials lists to establish the final scope and preliminary details for on-site engineering services.
- A.3.06 LANDSCAPE DESIGN/DOCUMENTATION Services. On an ongoing basis, Consultant shall develop and expand landscape Schematic Design Documents and develop outline specifications or materials lists to establish final scope and preliminary details for landscape work.
- A.3.07 MATERIALS RESEARCH/SPECIFICATIONS Services. Consultant shall: prepare for Owner's approval the proposed Special Conditions of the construction contract (the "Construction Contract"); develop architectural outline specifications or itemized lists and brief form identification of significant architectural materials, systems and equipment and their criteria and quality standards; coordinate similar activities of other disciplines; produce a design manual, including design criteria and outline specifications or materials lists. Where applicable, Consultant shall include: less toxic materials specifications or materials lists reviewed by third-party certification programs; safer products which are already commercially available to the extent that is practical; safer options that also limit premium costs and overall lifecycle costs.
- A.3.08 INTERIOR DESIGN/DOCUMENTATION Services. Consultant shall further develop and coordinate the approved schematic interior space plan based on functional relationships, code requirements, finishes, colors, systems and equipment. Consultant shall develop conceptual design solutions that are coordinated with architectural, structural, mechanical, electrical and equipment requirements and dimensions in order to establish an integrated design approach for a fully functional building. Consultant's coordination Services shall include verification of the building layout with the selected furniture system. Consultant shall provide workstation layout including low voltage ports, service voltage, special equipment, and panel feeds.
- A.3.09 PROJECT DEVELOPMENT SCHEDULING Services. Consultant shall review and update previously established schedules for the Project.
- A.3.10 STATEMENT OF PROBABLE CONSTRUCTION COST Services. Consultant shall update and refine the Schematic Design Phase Statement of Probable Construction Cost of the Project as it is related to the construction cost budget and taking into consideration: availability of materials and labor; Project delivery procedures; construction sequencing and scheduling; changes in scope of the Project; and adjustments in quality standards. Completion of these Services shall result in the "Design Development Phase Statement of Probable Construction Cost."

A.3.11 VALUE ENGINEERING Services. Consultant shall lead a review team during the design development phase of the Project. Consultant shall provide an intensive analysis of the entire Project.

A.3.12 COMMISSIONING PROCESS INTEGRATION Services. Consultant shall provide Services to coordinate those activities directly related to the commissioning of the building at the Project. These Services include working with the CA to develop a clearly defined design intent for the Project building and its systems. Consultant shall review and respond to all CA input provided throughout the Project. Consultant shall collaborate with the CA and provide specifications that list and describe the Contractor's duties in the commissioning processes.

A.4 PHASE 4 - BASIC SERVICES - CONSTRUCTION DOCUMENTS SERVICES – [RESERVED]

In the Construction Documents phase Consultant shall provide those Basic Services necessary to prepare, from the approved Design Development Documents, construction documents consisting of drawings, specifications and other documents setting forth in detail the requirements for construction of the Project, as well as the documents pertaining to bidding and contracting for the construction of the Project (the "Construction Documents"). Consultant's Services during Phase 4 shall consist of the following:

A.4.01 Upon written authorization from Owner to proceed, Consultant shall prepare, from the approved Design Development Documents, working drawings and specifications setting forth in detail the requirements for the construction of the entire Project. Additional requirements of the documents are:

- a. Owner shall provide the General and Supplemental General Conditions of the Construction Contract, which Consultant shall incorporate into the Construction Documents.
- b. Complete specifications shall be prepared using the Construction Specifications Institute's 3-part and 16-division format.
- c. Consultant shall provide Owner with in-progress Construction Documents as needed during development of this phase.
- d. After review and approval of the 100% complete draft Construction Documents by Owner, Consultant shall continue with preparation of the final documents, including final specifications for all authorized work on the Project, and shall incorporate in those final documents the comments and any modifications or changes desired by Owner, any modifications required for compliance with all applicable codes, regulations or standards, and the approved program or prior written approvals and instructions of Owner. The resulting final Construction Document submittal shall be a complete, fully coordinated, integrated package,

suitable for bidding distribution, without any significant addenda or further clarifications required.

- A.4.02 ARCHITECTURAL DESIGN/DOCUMENTATION Services. Consultant shall prepare drawings based on approved Design Development Documents setting forth in detail the architectural construction requirements for the Project.
- A.4.03 STRUCTURAL DESIGN/DOCUMENTATION Services. Consultant shall prepare final structural engineering calculations; drawings, and specifications based on approved Design Development Documents, setting forth in detail the structural construction requirements for the Project.
- A.4.04 MECHANICAL DESIGN/DOCUMENTATION Services. Consultant shall prepare final mechanical engineering calculations, drawings, and specifications based on approved Design Development Documents, setting forth in detail the mechanical construction requirements for the Project.
- A.4.05 ELECTRICAL DESIGN/DOCUMENTATION Services. Consultant shall prepare final electrical engineering calculations, drawings, and specification based on approved Design Development Documents, setting forth in detail the electrical construction requirements for the Project.
- A.4.06 CIVIL DESIGN/DOCUMENTATION Services. Consultant shall prepare final civil engineering calculations, drawings, and specifications based on approved Design Development Documents, setting forth in detail the civil construction requirements.
- A.4.07 LANDSCAPE DESIGN/DOCUMENTATION Services. Consultant shall prepare drawings and specifications based on approved Design Development Documents, setting forth in detail the landscape requirements for the Project.
- A.4.08 MATERIALS RESEARCH/SPECIFICATIONS Services. Consultant's in house architectural personnel shall: assist Owner in development and preparation of: bidding documents which describe the time, place, and conditions of bidding; bidding forms; and architectural specifications describing materials, systems, and equipment; workmanship; quality and performance criteria required for the construction of the Project (the "Bidding Documents"). These personnel shall also coordinate the development of specifications by other disciplines and compile the Project Manual, including conditions of the contract, Bidding Documents and specifications.
- A.4.09 PROJECT DEVELOPMENT SCHEDULING Services. Consultant shall review and update previously established schedules for the Project.
- A.4.10 STATEMENT OF PROBABLE CONSTRUCTION COST Services. Consultant shall update and refine the Design Development Phase Statement of Probable Construction Cost of the Project related to the construction cost budget and shall take into

consideration: availability of materials and labor; Project delivery; procedures; construction sequencing, and scheduling; changes in scope of the Project; and adjustments in quality standards. Completion of these Services shall result in the "Construction Documents Phase Statement of Probable Construction Cost."

- A.4.11 ALL SPECIFIED ITEMS SHALL BE STANDARD, cataloged, manufactured items or "off the shelf" items. No custom items shall be designed or specified without prior written authorization of Owner. No proprietary or "sole source" items shall be specified. Brand name products may be specified so long as "approved equal" is included with their specification, if there is no other practical method of specification.
- A.4.12 INTERIOR DESIGN/DOCUMENTATION Services. Consultant shall further develop and coordinate the space plan based on approval by Owner of the Design Development Documents. Consultant shall consult and coordinate with Owner to develop the detailed drawings with all information required for bidding. These Services shall include detailed requirements for the selected system furniture power and low voltage feeds.
- A.4.13 PLAN REVIEW INITIATION & COORDINATION Services. Consultant shall prepare all necessary project documents, with appropriate formatting and registration stamps, for submission to the mandatory authority having jurisdiction (the "AHJ") over the Project to obtain the building permit. Consultant shall apply and fill out all necessary documentation for a complete "plan check" submission prior to AHJ code review. In addition, Consultant shall meet with the AHJ as requested and answer project related questions and review applicable code compliance issues. Consultant shall be responsible for paying the "plan check" fees and will be reimbursed without markup as a Reimbursable Expense per Section B.2 of this Contract. The Construction Contractor will pay the building permit fee and all trades permits per the State of Oregon General Conditions for Public Improvement Contracts.
- A.4.14 COMMISSIONING PROCESS INTEGRATION Services. Consultant shall coordinate those activities directly related to the commissioning of the building at the Project. These Services shall include working with the CA in the development of a clearly defined design intent for the building and its systems. Consultant shall review and respond to all CA input provided throughout the Project. Consultant shall collaborate with and provide specifications that list and describe the Contractor's duties in the commissioning processes.

A.5 PHASE 5 - BASIC SERVICES - BIDDING SERVICES – [RESERVED]

In the bidding phase Consultant, following Owner's approval of the Construction Documents Phase Statement of Probable Construction Cost, shall provide those Basic Services necessary for Consultant to assist Owner in obtaining bids and in awarding contracts for the work required for the full construction of the Project (the "Work"). In

the case of phased construction, Owner may authorize bidding of portions of the Work prior to completion of the Construction Documents phase. Consultant's Services during Phase 5 shall consist of the following:

- A.5.01 BIDDING MATERIALS Services. Consultant shall organize and manage Bidding Documents for: coordination; reproduction; completeness review; distribution; distribution records; retrieval; receipt and return of document deposits; review, repair, and re-assembly of returned materials.
- A.5.02 ADDENDA Services. Consultant shall prepare, for distribution by Owner, all addenda, including supplemental drawings, specifications, instructions, and notices of changes in the bidding schedule and procedure.
- A.5.03 BIDDING Services. Consultant shall assist Owner in: establishing a list of bidders; participating in pre bid conferences; responding to questions from bidders and clarifications or interpretations of the Bidding Documents; and documenting and distributing bidding results.
- A.5.04 ANALYSIS OF ALTERNATES/SUBSTITUTIONS Services. Consultant shall consider, analyze, compare, and approve or reject alternatives or substitutions proposed by bidders prior to and after receipt of bids or proposals.
- A.5.05 SPECIAL BIDDING Services. Consultant shall document: decisions regarding multiple Construction Contracts or phased construction; technical evaluation of alternate building systems; and participation in detailed evaluation procedures for building systems proposals.

A.6 PHASE 6 - BASIC SERVICES - CONSTRUCTION CONTRACT ADMINISTRATION SERVICES – [RESERVED]

In the construction administration phase Consultant shall provide those Basic Services necessary for the administration of the Construction Contract as set forth in the General Conditions and Supplemental General Conditions of the Construction Contract. Consultant shall receive and transmit information as a representative of Owner during the construction of the Project and shall advise and consult with Owner. Instructions to Contractor shall be forwarded through Consultant. Consultant shall have authority to act on behalf of Owner only to the extent provided in the Construction Contract. The construction phase for each portion of the Project will commence with the award of the Construction Contract to the Contractor, and will terminate when the Construction Contract warranty period expires. Consultant's Services during Phase 6 shall consist of the following:

- A.6.01 OFFICE CONSTRUCTION ADMINISTRATION Services. Consultant shall process submittals, including receipt, review of, and appropriate action on shop drawings, product data, samples and other submittals required by the Construction Contract and

all documents specifically incorporated by reference into the Construction Contract (the "Contract Documents"). Consultant shall distribute submittals as required and shall maintain a master file of submittals and related communications.

- A.6.02 INSPECTION COORDINATION Services. With respect to independent inspection and testing agencies, Consultant shall: administer and coordinate field testing and inspections by independent agencies as required by the Contract Documents; recommend the scope, standards, procedures, and frequency of testing and inspections; arrange for testing and inspection on Owner's behalf; notify inspecting and testing agencies of status of the Work requiring testing and inspection; evaluate compliance by testing and inspection agencies with required scope, standards, procedures, and frequency of testing and inspections; review reports on inspections and tests and notify Owner and Contractor of observed deficiencies in the Work. Consultant shall oversee, and coordinate with Owner and Contractor, the review of any system furniture installation by the Contractor to verify that dimension requirements are met.
- A.6.03 SUPPLEMENTAL DOCUMENTS Services. Consultant shall: prepare, reproduce, and distribute supplemental drawings, specifications, and interpretations in response to requests for clarification by the Contractor or Owner and as required by construction exigencies; and forward Owner's instructions and provide guidance to the Contractor on Owner's behalf relative to changed requirements and schedule revisions.
- A.6.04 QUOTATION REQUESTS/CHANGE ORDERS Services. Consultant shall: prepare, reproduce and distribute drawings and specifications to describe Work to be added, deleted, or modified; review proposals from Contractor for reasonableness of quantities and costs of labor and materials; review and make recommendations regarding changes in time for substantial completion; review and make detailed recommendations, including, if requested, a specific alternative cost breakdown, regarding impact on space planning design; negotiate with Contractor on Owner's behalf regarding costs of Work proposed to be added, deleted, or modified; assist in the preparation of appropriate modifications of the Construction Contract; coordinate communications, approvals, notifications, and record keeping regarding changes in the Work.
- A.6.05 PAYMENT REVIEW Services. Consultant shall: evaluate and certify applications for payment, including review and determination of whether each charge is accurate and constitutes payment for fully authorized and completed Work, and maintain complete records regarding performance of this Service.
- A.6.06 PROJECT CLOSEOUT Services. Upon notice from the Contractor that the Work, or a designated portion thereof which is acceptable to Owner, is sufficiently complete, in accordance with the Contract Documents, to permit occupancy or utilization for the use for which it is intended, Consultant shall
- a. Perform a detailed inspection, with Owner's representative, of the Work for conformity to the Contract Documents to verify the list submitted by the

Contractor of items to be completed or corrected; and determine the amounts to be withheld until final completion.

- b. Issue certificates of substantial completion and perform inspection(s) upon notice by Contractor that the Work is ready for final inspection and acceptance.
- c. Notify Owner and Contractor of deficiencies found in follow up inspection(s), if any;
- d. Perform a final inspection with Owner's representative to verify final completion of the Work, and receipt and transmittal of warranties, affidavits, receipts, and releases and waivers of lien or bonds indemnifying Owner against liens;
- e. Issue final certificate(s) for payment; and
- f. Issue a summary of expenses. Consultant shall maintain and provide Owner with records regarding direct expenses including both general and specific travel expenses, whether reimbursable or not. This summary shall include all expenses incurred by Consultant and any Sub-consultants as a direct result of the performance of Services. The breakdown of these expenses shall be as follows:
 - i. All of Consultant's direct travel expenses, whether reimbursed or included in a Supplemental Service and therefore not separately reimbursed;
 - ii. All of Sub-consultants' direct travel expenses, whether reimbursed or included in a Supplemental Service and therefore not separately reimbursed;
 - iii. All of Consultant's direct general expenses, other than travel expenses, whether reimbursed or included in a Supplemental Service and therefore not separately reimbursed; and
 - iv. All of Sub-consultants' direct general expenses, other than travel expenses, whether reimbursed or included in a Supplemental Service and therefore not separately reimbursed.

A.6.07 RECORD DOCUMENT Services. Consultant shall provide Owner with accurate record drawings and record specifications manuals for the Project as more particularly described in this Section. Consultant shall deliver to Owner, within 60 days from receipt of the Contractor's working record documents, the following record documents (the "Record Documents"):

- a. Hardcopy Set - The Record Documents shall consist of one (1) complete sets of record drawings, prepared 20 lb. (minimum) bond media (the "Record Drawings"). The Record Drawings shall include all drawing sheets used for bidding including; addenda, all changes resulting from regulatory reviews, change orders and as-built conditions. Consultant is not responsible for the accuracy of the working as-built drawings furnished by Contractor.
- b. Electronic Set - A complete set of Record Drawings (as described above in Section A.6.07(a) above) and generated in AutoCAD (version as directed by

Owner) shall be provided to Owner by Consultant, as well as an electronic version of the complete specifications in a file format approved by Owner. Consultant shall verify that all electronic drawings are readable and that all AutoCAD xreference ("Xrefs") files are bound and formatted in such a way as to be readable by the AutoCAD version they are saved in. Consultant shall provide a list of all drawings, including Xrefs that are associated with the Record Drawings. The electronic Record Documents shall be provided on recordable (not re-recordable) compact discs.

A.6.08 WARRANTY REVIEW Services. Consultant shall: consult with and make recommendations to Owner, during the duration of the Construction Contract warranty period, concerning inadequate performance of materials, systems, and equipment under warranty; perform inspections prior to expiration of the warranty period to ascertain adequacy of performance of materials, systems, and equipment; and document defects or deficiencies and assist Owner in preparing instructions to the Contractor for correction of noted defects.

A.6.09 CONSTRUCTION CONTRACT ADMINISTRATION Services. Consultant shall perform Construction Contract administration Services as set forth in this section and the Contract Documents.

- a. Consultant shall visit the site at weekly intervals, and upon special circumstances as requested by Owner, to be familiar with the progress and quality of the Work, and to determine if the Work is generally proceeding in accordance with the Contract Documents. Consultant, in conjunction with the payment review, shall report to Owner on the accuracy of Contractor's working record drawings each month during construction. However, Consultant shall not be required to make exhaustive or continuous on-site inspections to check the quality or quantity of the Work. On the basis of such on-site observations, Consultant shall report such visits, observations, and information in a weekly written report to Owner.
- b. Consultant shall not have control or charge of, and shall not be responsible for construction means, methods, techniques, sequences, or procedures, for safety precautions and programs in connection with the Work. Consultant, by virtue of its position alone and without regard for Consultant's actual involvement on site, shall not have control or charge of, and shall not be responsible for the acts or omissions of Contractor and any subcontractors or any other persons performing any of the Work, or for the failure of any of them to carry out the Work in accordance with the Contract Documents.
- c. Subject to the concurrence of Owner, Consultant shall be the interpreter of the requirements of the Contract Documents, regarding the performance thereunder by both Owner and Contractor. Accordingly, Consultant shall render interpretations necessary for the proper execution or progress of the Work with reasonable promptness on written request of either Owner or Contractor, and shall

render written decisions, within a reasonable time, on all claims, disputes, and other matters in question between Owner and Contractor relating to the execution or progress of the Work or the interpretation of the Contract Documents. Owner shall render a final determination in the event that Owner disagrees with Consultant's proposed interpretation or decision.

- d. Consultant shall review and take appropriate action on Contractor's submittals, including shop drawings, product data, and samples, checking for conformance with the design concept of the Work and the Contract Documents. Such action shall be taken with reasonable promptness so as to cause no delay. Consultant shall forward to Owner one (1) copy of all approved shop drawings, product data, and samples, together with correspondence related to these documents as a record of the Work. Consultant's approval of a specific item shall not indicate approval of an assembly of which the item is a component.
- e. Consultant shall conduct construction observations and reviews to determine "Substantial Completion" and "Final Completion" (as those terms are defined in the Construction Contract) and shall receive and forward to Owner written warranties and related documents required by the Contract Documents and assembled by Contractor. Consultant, with Owner's concurrence, shall prepare and certify a "Certificate of Substantial Completion" and a "Certificate of Final Payment" under the Construction Contract.

A.7 PHASE 7 – SUPPLEMENTAL SERVICES – [RESERVED]

In addition to the generally sequential Services described in Phases 1 through 6, Consultant shall provide supplemental services designated below (the "Supplemental Services") upon written instruction from Owner. These non-sequential Services may be provided during a single phase of Services or during several phases, as herein specified, and shall include the following (Owner reserves the right to amend the Contract and delete Supplemental Services not needed as a part of the Project; in that event, Owner shall receive a credit against the Contract amount payable to Consultant, based on the value of the Services removed from Statement of Work or such other standard as agreed by the Parties):

- A.7.01 GRAPHICS DESIGN SERVICES. Consultant shall: design interior signs and identify symbols; and document requirements for procurement of graphics work.
- A.7.02 RENDERING Services. Consultant shall provide a graphic pictorial representation of the proposed Project consisting of one black and white exterior view to the entry, approximately 18" X 24" format.
- A.7.03 LOW VOLTAGE SECURITY & FIRE ALARM SYSTEM DESIGN Services. Consultant shall provide design, layout, specification and document development of a comprehensive low voltage fire alarm and keycard-access security system, identifying

and locating each device utilizing Owner's authorized system provider's equipment. Consultant shall be required to determine and coordinate the electrical interface between building electrical and security at all designated door locations, and to observe installation and testing of security system(s), equipment, and devices during construction.

- A.7.04 COMMUNICATIONS AND DATA CONSULTANT Services. Consultant shall provide such Services in the programming, design, layout, specifications, coordination, installation, and observation of installation and testing, as may be necessary to complete installation of a successful telecom and data system in accordance with Owner requirements.
- A.7.05 OWNER REQUESTED ADDITIONAL MEETINGS (maximum of 5 meetings with 5 attendees each visit) Services. Consultant shall attend and participate in additional meetings, at either Owner's offices or other locations, of members of the design team as requested by Owner. Payment for additional meetings shall be based on: a) the specific personnel requested by Owner to be in attendance; b) the specific hourly rates as set forth in Exhibit F, Rate Schedule, and, c) the duration of the meeting in hours or fractions of hours for each of the requested attending personnel. Hourly rates for travel time required to attend such meetings shall be fifty percent (50%) of the applicable Contract rate. Reimbursable expenses shall be allowed in accordance with Exhibit B, Section B.2, up to an amount not to exceed 10% of Owner-approved total combined hourly fees associated with this meeting.
- A.7.06 ENERGY INCENTIVES COORDINATION Services. Consultant shall provide analysis and documentation necessary for Owner to obtain the maximum amount of energy incentives available through the State of Oregon, Business Energy Tax Credit (BETC) through the Oregon Department of Energy (ODOE), utility incentives available through an appropriate local utility, and energy incentives available through the Energy Trust of Oregon (ETO). Consultant's responsibilities shall include, but are not limited to: determining requirements for available incentives through cooperation with ODOE, the local utility, and ETO; completing all required documentation for submission; and ensuring that all required documentation is submitted in the required timeline. Consultant shall coordinate with Owner to resolve any potential issues to ensure that documentation is submitted when required.

MARION COUNTY STANDARD PROFESSIONAL SERVICES CONTRACT

MARION COUNTY STANDARD PROFESSIONAL SERVICES CONTRACT EXHIBIT B - CONSULTANT COMPENSATION

B.1 BASIS OF COMPENSATION

B.1.01 Owner shall compensate Consultant for the performance of Services set forth in Exhibit A, as follows:

Consultant shall perform the Basic & Supplemental Services for: a maximum, not-to-exceed price of [\$80,500.00] \$606,455.00.

B.1.02 Payments for Services shall be made monthly, following Owner's review and approval of detailed invoices submitted by Consultant and acceptance of the Services or approval by Owner. Payment for all Services performed shall not exceed the amounts indicated in Section B.1.03, below. Owner shall make payments only after Owner's receipt and approval of (i) Consultant's detailed monthly invoice as described in Section B.1.07, and (ii) all reports, designs, certificates, and documents covered by the invoice. Payments are subject to the provisions of ORS 293.462.

B.1.03 Payments for Basic Services shall be in proportion to the Services performed within Phases 1 through 6 set forth in Exhibit A. The total compensation for each Phase of the Services shall not exceed the following percentages of the total amount payable for the Services (Note: The Supplemental Services indicated in Section A.7 of Exhibit A, may or may not be provided concurrently with Phases 1 through 6. Therefore, the percentages set forth below do not include the Phase 7 Supplemental Services. Supplemental Services, if authorized, are to be billed as separate line items in accordance with Section B.1.07. Warranty Period Services, which may be included by Contract amendment, are listed separately):

Phase	Percentage	\$ Amount
Programming/Conceptual Design Services - <u>Completed</u>	[100.0%] <u>7.5%</u>	[\$0.00] <u>\$45,483.00</u>
<u>Schematic Design and Design Development Services – Lump Sum</u>	[0.0%] <u>16.8%</u>	[\$0.00] <u>\$101,761.00</u>
<u>Energy Trust of Oregon EcoCharette – T&M not to exceed</u>	<u>0.4%</u>	<u>\$2,600.00</u>
<u>Construction Documents/Permitting Services – Lump Sum</u>	[0.0%] <u>39.4%</u>	[\$0.00] <u>\$239,063.00</u>
<u>Class 3 Site Plan Review – T&M not to exceed</u>	<u>4.0%</u>	<u>\$24,250.00</u>
<u>Bidding Services, Construction Administration, Record Drawings – T&M not to exceed</u>	[0.0%] <u>28.6%</u>	[\$0.00] <u>\$173,298.00</u>
[Construction Contract Administration Services]	[0.0%]	[\$0.00]
Warranty Period Services	[0.0%] <u>0.8%</u>	[\$0.00] <u>\$5,000.00</u>
<u>Reimbursable Expenses – T&M not to exceed</u>	<u>2.5%</u>	<u>\$15,000.00</u>
Total	100.0%	[\$0.00] <u>\$606,455.00</u>

MARION COUNTY STANDARD PROFESSIONAL SERVICES CONTRACT

B.1.04 RESERVED

Supplemental Service	\$ Amount
Total	

B.1.05 RESERVED

1	<u>Travel Related Expenses</u>	
2	<u>General Reimbursable Expenses</u>	
	Total	

B.1.06 Consultant shall not submit invoices for, and Owner will not pay, any amount in excess of the maximum, not to exceed amount payable under this Contract set forth in Section B.1.01. If this amount is increased by Contract amendment, the amendment must be effective before Consultant performs Services subject to the amendment. Consultant shall notify Owner's Representative identified in this Contract in writing of the expiration of the Contract, thirty (30) days prior to such expiration. No payment will be made for any Services performed prior to the Effective Date or after the expiration date of the Contract.

B.1.07 Consultant shall submit monthly invoices for Services performed. To be processed for payment by Owner, the invoices shall include the following basic information:

- a. The correct name of Owner's authorized representative
- b. Invoice date
- c. Date range during which the Services being invoiced for were provided
- d. The last invoice submitted on the Project must be clearly labeled "Final Invoice"
- e. Original Contract total, not to exceed amount broken out by: Basic Services, Supplemental Services released to date by line item, and Reimbursable Expenses separated by two categories of Travel Expenses and General Reimbursables
- f. Statement of changes to the original total, not to exceed amount by amendment(s) and broken out in the same way as in item F, showing the revised Contract amounts
- g. Paid to date amounts showing the amounts submitted for prior to the current invoice (regardless of payment status) and broken out the same way as in item F
- h. Amounts being invoiced for in the current invoice and broken out the same way as in item F, with a roll up of a "Total Amount Billed For This Invoice" line item amount
- i. Balances Remaining after receipt of payment for the current invoice broken out the same way as in item F

Consultant shall describe all Services performed with particularity and by whom it was performed and shall itemize and explain all expenses for which reimbursement is claimed. Reimbursable Expenses shall be broken out into to line-item categories, 1) Travel Expenses and 2) General Reimbursable Expenses.

MARION COUNTY STANDARD PROFESSIONAL SERVICES CONTRACT

Invoices for Basic Services under a specific Phase shall be for completed Basic Services only and shall indicate the percentage of the total Basic Services for that Phase that the amount invoiced represents. Invoice amounts for authorized fixed price Supplemental Services shall indicate the Supplemental Service, its contract reference number, the total amount of the fixed price Supplemental Service, and the total percentage and related dollar amount of the fixed price Supplemental Service completed by the end of the current invoice period, less the total dollar amount previously billed for, with the balance representing the total amount being currently billed for. Invoices for authorized Supplemental Services based on a not to exceed amount shall set forth the number of hours worked by Consultant's personnel on the identified Service, describe the Services performed by each such personnel in detail on a daily basis, and set forth the rate of compensation for each of such personnel as set forth in EXHIBIT F.

Consultant shall send invoices to Owner's Representative identified in this Contract, using the following address:

MCBS-billing@co.marion.or.us

Consultant shall not indicate or invoice for any past due amounts in the current invoice. All such notifications of a past due amount must be handled by a separate Statement of Account.

Owner shall have the right to reject any invoice which does not have the proper information as required by this section without incurring penalty liabilities for late payment.

B.1.08 Owner and Consultant agree in accordance with the terms and conditions of this Contract that:

- a. If the scope of the Project or the Services are changed materially, Consultant shall request in writing an amendment to the Contract before additional Services are provided and before compensation is adjusted. All legally required approvals must be obtained for any Contract amendment before the amendment is effective and before Services may be performed or payment made under the amendment.
- b. Consultant's fee for preparing routine change orders adding or deleting Services from the Project shall be included in the maximum not-to-exceed amount for Basic Services stated in Section B.1.03.
- c. Upon Owner's request and without additional compensation, Consultant shall make such revisions to completed Contract Documents as are necessary to correct errors or omissions appearing therein, in accordance with the standard of care described in Section 2.1.1 of Consultant's Responsibilities; Representations and Warranties.

B.2 REIMBURSABLE EXPENSES -

- B.2.01** Reimbursable Expenses are in addition to compensation for Services and shall not exceed the maximum amount stated in Section B.1.05 without prior authorization by Owner. This amount is separated into two categories, Travel Expenses and General Reimbursable Expenses, as outlined below. Reimbursable Expenses include actual, allowable and reasonable expenditures made by Consultant and Consultant's employees in performing the Services required in Exhibit A. Reimbursable Expenses must be evidenced by copies of actual third-party invoices or

MARION COUNTY STANDARD PROFESSIONAL SERVICES CONTRACT

receipts delivered to Owner to qualify for reimbursement and are limited to the types of actual expenses listed below.

- a. General Reimbursable Expenses consist of:
 - i. Long distance communications.
 - ii. Reproductions, postage and handling of drawings and specifications and other documents, excluding reproductions of drawings, specifications and other documents used by Consultant and Consultant's subconsultants.
 - iii. Data processing and photographic production techniques when used in connection with Supplemental Services.
 - iv. Third-party models and mockups requested by Owner.
 - v. The printing of master or reproducible sets of plans and project manuals including specifications.
 - vi. Plan check fees.
- b. Travel Expenses:

All travel shall be allowed only when the travel is essential to the normal discharge of Consultant's responsibilities under the Contract. All travel shall be conducted in the most efficient and cost-effective manner resulting in the best value to the Owner. The travel must comply with all the requirements set forth in this section and must be for official Marion County business only. Personal expenses shall not be authorized at any time. All expenses are included in the total maximum Contract amount stated in Section B.1.01.

Current approved rates are as follows:

- i. Mileage. Mileage for travel in a private automobile, while Consultant is acting within the course and scope of his/her duties under this Contract and driving over the most direct and usually traveled route, will be reimbursed at a rate of [62.5] 65.5 cents per mile. To qualify for mileage reimbursement, Consultant must hold a valid, current driver's license for the class of vehicle to be driven and carry personal automobile liability insurance in amounts not less than those required by (i) the Oregon Financial Responsibility Law (ORS 806.060) or (ii) the jurisdiction in which the vehicle is being operated, whichever is greater. No mileage reimbursement will be paid for the use of motorcycles or mopeds.
- ii. Meals. Receipts are required for reimbursement.

Owner will not pay any mark up over actual allowable reimbursement costs. Any costs associated with recordkeeping or labor to create reproductions of receipts is considered indirect overhead and therefore part of Consultant's Professional Hourly Rates.

MARION COUNTY STANDARD PROFESSIONAL SERVICES CONTRACT

(Architectural, Engineering, Land Surveying and Related Services)

THIS PROFESSIONAL SERVICES CONTRACT (the “Contract”) is between Marion County, a political subdivision of the State of Oregon, by and through its Business Services department, (the “Owner”), and:

Company:	<u>Mackenzie Engineering, Inc.</u>	Contract #	<u>BS-4834-22</u>
Address:	<u>1515 SE Water Avenue, Suite 100</u>	Fax:	<u>503-228-1285</u>
City, State Zip:	<u>Portland, OR 97214</u>	Email:	<u>jhumphreys@mcknze.com</u>
Phone:	<u>503-224-9560</u>		

(the “Consultant”) (collectively Owner and Consultant are referred to as the "Parties").

RECITALS

- A. On January 5, 2022, the County issued Request for Proposal for Architectural and Engineering and Related Services for the Marion County Evidence Building.
- B. The Consultant submitted a response to the Request for Proposal dated February 15, 2022 and was evaluated and awarded.
- C. Parties agree that this Contract includes a limited initial scope of work, namely Phase 1 – Basic Services – Programming/Conceptual Design Services.
- D. Consultant shall submit a proposal for performance of Phases 2 -7 as directed by the County. Project Work including design development, construction documents, bidding services, construction contract administration and supplemental services.
- E. The proposal shall include any proposed changes in Phase 2 scope resulting from work completed under Phase 1, and a detailed fee proposal for completing Phase 2-7 services. Phases 2-7 services may be added to this contract by amendment. If County does not accept Consultant’s proposal, this Contract will expire.
- F. In consideration of the foregoing premises, the parties hereto agree as follows:

AGREEMENT

This Contract is for Services related to completion of the project more particularly described as follows (the “Project”):

Marion County Evidence Building to be located at Marion County Jail Campus, 4000 Aumsville Highway SE, Salem, Oregon.

The maximum not to exceed for Phase 1 of this Contract is \$80,500.00.

This Contract shall become effective on the date that the Contract is fully executed by the Parties and all required Marion County approvals have been obtained (the “Effective Date”). No Services shall be performed prior to the Effective Date. The Contract shall expire, unless otherwise terminated or extended, on June 28, 2024. Generally, the Services to be performed by Consultant on the Project consist of the following (the “Services”):

Architectural and engineering services in support of the Project described above. Specific services may include, but not be limited to: programming and conceptual design (Phase 1).

The Services are more specifically described in the **EXHIBIT A, Statement of Work**. Owner agrees to pay Consultant a sum not to exceed \$80,500.00 for performance of the Services, which shall include all allowable expenses. Progress payments shall be made in accordance with **EXHIBIT B, Consultant Compensation**.


This Contract consists of these introductory provisions and the signature page(s), Section 1-Relationship of the Parties, Section 2-Consultant's Responsibilities; Representations and Warranties, Section 3-Responsibilities of Owner; Special Contract Provisions, Section 4-General Contract Provisions and the following exhibits attached hereto and incorporated herein by this reference:

EXHIBIT A: Statement of Work
EXHIBIT B: Consultant Compensation
EXHIBIT C: Insurance Provisions
EXHIBIT D: Special Contract Provisions

EXHIBIT E: Critical Date Schedule
EXHIBIT F: Rate Schedule
EXHIBIT G: Assumptions and Exclusions

THIS CONTRACT CONSTITUTES THE ENTIRE AGREEMENT BETWEEN THE PARTIES ON THE SUBJECT MATTERS ADDRESSED HEREIN. THE TERMS OF THIS CONTRACT CANNOT BE WAIVED, ALTERED, MODIFIED, SUPPLEMENTED OR AMENDED, IN ANY MANNER WHATSOEVER, EXCEPT BY WRITTEN INSTRUMENT SIGNED BY THE PARTIES AND CONTAINING ALL REQUIRED APPROVALS. ANY SUCH WAIVER, ALTERATION, MODIFICATION, SUPPLEMENTATION OR AMENDMENT SHALL BE EFFECTIVE ONLY IN THE SPECIFIC INSTANCE AND FOR THE SPECIFIC PURPOSE GIVEN. THERE ARE NO UNDERSTANDINGS, AGREEMENTS, OR REPRESENTATIONS, ORAL OR WRITTEN, REGARDING THIS CONTRACT EXCEPT AS CONTAINED, INCORPORATED, OR REFERENCED HEREIN. CONSULTANT, BY THE SIGNATURE BELOW OF ITS AUTHORIZED REPRESENTATIVE, HEREBY ACKNOWLEDGES THAT IT HAS READ THIS CONTRACT, UNDERSTANDS THIS CONTRACT, AND AGREES TO BE BOUND BY ALL OF THIS CONTRACT'S TERMS AND CONDITIONS. THIS CONTRACT, AND ANY AMENDMENTS TO IT, MAY BE EXECUTED IN COUNTERPARTS (EACH OF WHICH SHALL BE AN ORIGINAL AND ALL OF WHICH SHALL CONSTITUTE BUT ONE AND THE SAME INSTRUMENT) OR IN MULTIPLE ORIGINALS.

MARION COUNTY SIGNATURES
BOARD OF COMMISSIONERS:

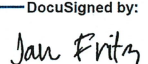
 7/20/2022
 Chair Date

 7/20/22
 Commissioner Date

 7.20.2022
 Commissioner Date

Authorized Signature:  6/29/2022
DocuSigned by:
F5BA28963242445...

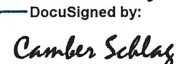
Department Director or designee Date

Authorized Signature:  6/30/2022
DocuSigned by:
DC16351248DE4EC...

Chief Administrative Officer Date

Reviewed by Signature:  6/30/2022
DocuSigned by:
D0CFC5B04B9F483...

Marion County Legal Counsel Date

Reviewed by Signature:  6/29/2022
DocuSigned by:
C5B2F3DF257F444...

Marion County Contracts & Procurement Date

MACKENZIE ENGINEERING, INC. SIGNATURE

Authorized Signature:  7/22/2022
DocuSigned by:
F21551B9019E4FE...

Date

Title: Principle / Director of Architecture

1 RELATIONSHIP OF THE PARTIES

1.1 Consultant shall provide the Services for the Project in accordance with the terms and conditions of this Contract. Consultant's performance of Services shall be as a professional consultant to Owner to carry out the Project and to provide the technical documents and supervision to achieve Owner's Project objectives.

1.2 In administering this Contract, Owner may retain the services of an independent project manager and other consultants as needed to fulfill Owner's objectives.

1.3 Consultant shall provide a list of all sub-consultants which Consultant intends to utilize on the Project (the "Sub-consultants"). This list shall include such information on the qualifications of the Sub-consultants as may be requested by Owner. Owner reserves the right to review the Sub-consultants proposed. Consultant shall not retain a Sub-consultant to which Owner has a reasonable objection.

1.4 Consultant acknowledges that this Contract was awarded on the basis of the unique background and abilities of the key personnel of Consultant and Sub-consultants identified by Consultant (collectively, the "Key Personnel" and individually, the "Key Person"). Therefore, Consultant shall make available Key Personnel as identified in its proposal. Consultant shall provide to Owner a list of the proposed Key Personnel to be assigned to the Project. This list shall include such information on the professional background of each Key Person as may be requested by Owner. If any Key Person becomes unavailable to Consultant, the Parties shall mutually agree upon an appropriate replacement. Without prior notice to, and the written consent of, Owner, Consultant shall not: (i) re-assign or transfer any Key Person to other duties or positions so that the Key Person is unable to fully perform his or her responsibilities under the Contract; (ii) allow any Key Person to delegate to anyone his or her performance of any management authority or other responsibility required under the Contract; or (iii) substitute any Key Person. Any of these actions shall constitute a material breach of the Contract. Consultant shall remove any individual or Sub-consultant from the Project if so directed by Owner in writing following discussion with Consultant, provided that Consultant shall have a reasonable time period within which to find a suitable replacement.

2 CONSULTANT'S RESPONSIBILITIES; REPRESENTATIONS AND WARRANTIES

2.1 Consultant agrees that:

2.1.1 The phrase "Standard of Care" that is used in this Contract is defined as follows: the same professional skill, care, diligence and standards as other professionals performing similar services under similar conditions (the "Standard of Care");

2.1.2 Consultant shall perform all Services in accordance with the Standard of Care;

2.1.3 Consultant shall prepare, in accordance with the Standard of Care, all drawings, specifications, deliverables and other documents so that they accurately reflect, fully comply with and incorporate all applicable laws, rules, and regulations, and so that they are complete and functional for the purposes intended, except as to any deficiencies which are due to causes beyond the control of Consultant;

2.1.4 Consultant shall be responsible for correcting any inconsistencies, errors or omissions in the drawings, specifications, deliverables and other documents prepared by Consultant at no additional cost to Owner;

2.1.5 Owner's review or acceptance of documents shall not be deemed as approval of the adequacy of the drawings, specifications, deliverables, and other documents. Any review or acceptance by Owner will not relieve Consultant of any responsibility for complying with the Standard of Care;

2.1.6 Except as provided in Supplemental Services addressed within Exhibits A and B, Consultant shall, at no additional cost to Owner, render assistance to Owner in resolving problems or other issues relating to the Project design or to specified materials;

2.1.7 During the term of the Contract, Consultant shall obtain, hold, maintain and fully pay for all licenses and permits required by law for Consultant to conduct its business and perform the Services. During the term of the Contract, Owner shall pay for, and Consultant shall obtain, hold and maintain all licenses and permits required for the Project, unless otherwise specified in the Contract. Consultant shall review the Project site and the nature of the Services and advise Owner throughout the course of the Project as to the necessity of obtaining all Project permits and licenses, the status of the issuance of any such permits and licenses, and any issues or impediments related to the issuance or continuation of any such permits and licenses; and

2.1.8 Consultant shall pay all Sub-consultants and other subcontractors as required by Consultant's contracts with those Sub-consultants and subcontractors. Consultant agrees that Owner has no direct or indirect contractual obligation or other legal duty whatsoever to pay the Sub-consultants and other subcontractors of Consultant or otherwise ensure that Consultant makes full and timely payment to those Sub-consultants and subcontractors for services performed on the Project.

2.2 Consultant represents and warrants to Owner that:

2.2.1 Consultant has the power and authority to enter into and perform this Contract; the persons executing this Contract on behalf of Consultant have the actual authority to bind Consultant to the terms of this Contract;

2.2.2 When executed and delivered, this Contract shall be a valid and binding obligation of Consultant enforceable in accordance with its terms; the provisions of this Contract do not conflict with or result in a default under any agreement or other instrument binding upon Consultant and do not result in a violation of any law, regulation, court decree or court order or other legal process applicable to Consultant;

2.2.3 Consultant shall, at all times during the term of this Contract, be duly licensed to perform the Services, and if there is no licensing requirement for the profession or Services, be duly qualified and competent;

2.2.4 Consultant is an experienced firm having the skill, legal capacity, and professional ability necessary to perform all the Services required under this Contract and to design and administer a project having the scope and complexity of the Project;

2.2.5 Consultant has the capabilities and resources necessary to perform Consultant's obligations under this Contract;

2.2.6 Consultant is, or shall become, in a manner consistent with the Standard of Care, familiar with all current laws, rules, and regulations which are applicable to the design and construction of the Project;

2.2.7 All Services shall be performed in accordance with the Standard of Care;

2.2.8 The Project, when completed and if constructed in accordance with the intent established by the drawings, specifications, deliverables and other documents prepared by Consultant pursuant to this Contract, shall be structurally sound and a complete and properly functioning facility suitable for the purposes for which it is intended.

2.2.9 The published specifications of the "Automated Systems" that Consultant has specified, designated, and planned pursuant to this Contract conform to the Contract requirements. For the purposes of this subsection, "Automated Systems" shall mean any computers, software, firmware, HVAC systems, elevators, electrical systems, fire or life safety systems, security systems and any other electrical, mechanized, or computerized devices serving the Project.

2.3 The warranties set forth in this section are in addition to, and not in lieu of, any other warranties provided in this Contract or at law.

3 RESPONSIBILITIES OF OWNER; SPECIAL CONTRACT PROVISIONS

Owner's responsibilities under this Contract, and certain additional responsibilities of Consultant, are set forth in Exhibit D-Special Contract Provisions.

4 GENERAL CONTRACT PROVISIONS

4.1 Contract Performance. Consultant shall at all times perform the Services diligently and without delay and shall punctually fulfill all Contract requirements consistent with the schedule for the performance of Services set forth in Exhibits A and E. Expiration or termination of the Contract shall not extinguish, prejudice, or limit either party's right to enforce this Contract with respect to any default or defect in performance. Time is of the essence in the performance of this Contract.

4.2 Access to Records. For not less than ten (10) years after the Contract's expiration or termination, Owner, the Secretary of State's Office of the State of Oregon, the federal government, and their duly authorized representatives shall have access to the books, documents, papers, and records of Consultant and the Sub-consultants which pertain to the Contract for the purpose of making audits, examination, excerpts, and transcripts. If, for any reason, any part of this Contract, any Project-related consultant contract or any Project-related construction contract(s) is involved in litigation, Consultant shall retain all pertinent records for not less than seven (7) years or until all litigation is resolved, whichever is longer. Consultant shall provide Owner and the other entities referenced above with full access to these records in preparation for and during litigation.

4.3 Funds Available and Authorized. Owner reasonably believes as of the Effective Date that sufficient funds are available and authorized for expenditure to finance the cost of this Contract

within Owner's appropriation or limitation. Consultant understands and agrees that, to the extent that sufficient funds are not available and authorized for expenditure to finance the cost of this Contract, Owner's payment of amounts under this Contract attributable to Services performed after the last day of the current budget cycle is contingent upon County budgeting and appropriating funds or other expenditure authority sufficient to allow County, in the exercise of its reasonable administrative discretion, to continue to make payments under this Contract.

4.4 Insurance. Consultant shall maintain in effect for the duration of this Contract, or any other time periods required herein, the insurance set forth in Exhibit C-Insurance Provisions.

4.5 Indemnity.

4.5.1 CLAIMS FOR OTHER THAN PROFESSIONAL LIABILITY. CONSULTANT SHALL INDEMNIFY, DEFEND, SAVE, AND HOLD HARMLESS OWNER, AND ITS OFFICERS, AGENTS, AND EMPLOYEES, FROM AND AGAINST ALL CLAIMS, SUITS, ACTIONS, LOSSES, DAMAGES, LIABILITIES, COSTS AND EXPENSES OF WHATSOEVER NATURE RESULTING FROM OR ARISING OUT OF THE ACTS OR OMISSIONS OF CONSULTANT OR ITS SUB-CONSULTANTS, SUBCONTRACTORS, AGENTS, OR EMPLOYEES UNDER THIS CONTRACT.

4.5.2 CLAIMS FOR PROFESSIONAL LIABILITY. CONSULTANT SHALL INDEMNIFY, DEFEND, SAVE, AND HOLD HARMLESS OWNER, AND ITS OFFICERS, AGENTS, AND EMPLOYEES, FROM AND AGAINST ALL CLAIMS, SUITS, ACTIONS, LOSSES, DAMAGES, LIABILITIES, COSTS AND EXPENSES OF WHATSOEVER NATURE ARISING OUT OF THE PROFESSIONALLY NEGLIGENT ACTS, ERRORS OR OMISSIONS OF CONSULTANT OR ITS SUB CONSULTANTS, SUBCONTRACTORS, AGENTS, OR EMPLOYEES IN THE PERFORMANCE OF PROFESSIONAL SERVICES UNDER THIS CONTRACT.

4.5.3 Owner Defense Requirements. Notwithstanding the obligations under Sections 4.5.1 and 4.5.2, neither Consultant nor any attorney engaged by Consultant shall defend any claim in the name of Marion County, nor purport to act as legal representative of Marion County or any of its agencies, without the prior written consent of Marion County Legal Counsel. Owner may, at any time and at its election, assume its own defense and settlement of any claims in the event that: it determines that Consultant is prohibited from defending Marion County; Consultant is not adequately defending Marion County's interests; an important governmental principle is at issue; or it is in the best interests of Marion County to do so, Marion County reserves all rights to pursue any claims it may have against Consultant if Marion County elects to assume its own defense.

4.5.4 Owner's Actions. This Section 4.5 does not include indemnification by Consultant of Owner or their officers, agents, and employees, for the acts or omissions of the Owner or their officers, agents, and employees, whether within the scope of the Contract or otherwise.

4.6 Consultant's Status.

4.6.1 Consultant shall perform all Services as an independent contractor. Although Owner reserves the right to set the delivery schedule for the Services to be performed and to evaluate the

quality of the completed performance, Owner cannot and will not control the means and manner of Consultant's performance. Consultant is responsible for determining the appropriate means and manner of performing the Services. Consultant, Consultant's employees and the Sub-consultants are not "officers, employees, or agents" of Owner, as those terms are used in ORS 30.265.

4.6.2 Consultant shall not have control or charge of, and shall not be responsible for, the acts or omissions of other consultants or contractors under contract with Owner who are performing services or construction work on the Project. However, this provision does not in any way change Consultant's professional responsibility to report to Owner any information, including information on the performance of consultants or contractors outside the control or charge of Consultant, concerning activities or conditions that have or could have an adverse effect on Owner or the Project.

4.6.3 Consultant is not a contributing member of the Public Employee's Retirement System and will be responsible for any federal, state, or other taxes applicable to any compensation or payments paid to Consultant under this Contract. Consultant will not be eligible for any benefits from any payments made under this Contract for federal Social Security, unemployment insurance, or worker's compensation, except as a self-employed individual. If any payment under this Contract is to be charged against federal funds, Consultant certifies that it is not currently employed by the federal government.

4.7 ***Successors & Assignments.*** The provisions of this Contract shall be binding upon and shall inure to the benefit of the Parties and their respective successors and assigns. After the original Contract is executed, Consultant shall not enter into any Sub-consultant agreements for any of the Services or assign or transfer any of its interest in this Contract, without the prior written consent of Owner.

4.8 ***Compliance with Applicable Law.*** Consultant shall comply with all federal, state and local laws, regulations, executive orders and ordinances applicable to the Services. Owner's performance under this Contract is conditioned upon Consultant's compliance with the provisions of ORS 279C.505, 279C.515, 279C.520, and 279C.530, which are hereby incorporated by reference. Consultant, the Sub-consultants, if any, and all employers providing Services, labor or materials under this Contract are subject employers under the Oregon workers' compensation law and shall comply with ORS 656.017.

4.9 ***Governing Law; Jurisdiction; Venue.*** This Contract shall be governed by and construed in accordance with the laws of the State of Oregon without regard to principles of conflicts of law. Any claim, action, suit or proceeding (collectively "Claim") between Owner and Consultant that arises from or relates to this Contract shall be brought and conducted solely and exclusively within the Circuit Court of Marion County for the State of Oregon; provided, however, if a Claim must be brought in a federal forum, then it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event shall this "Governing Law; Jurisdiction; Venue" section be construed as a waiver by Marion County of any form of defense or immunity, whether based on sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the United States Constitution or otherwise. CONSULTANT, BY EXECUTION OF THIS CONTRACT, HEREBY CONSENTS TO THE IN PERSONAM JURISDICTION OF SAID COURTS.

4.10 Tax Compliance Certification.

4.10.1 By signature on this Contract, the undersigned certifies under penalty of perjury that the undersigned is authorized to act on behalf of Consultant and that Consultant is, to the best of the undersigned's knowledge, not in violation of any Oregon Tax Laws.

4.10.2 For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 401.792 to 401.816 (Tax For Emergency Communications), 118 (Inheritance Tax), 314 (Income Tax), 316 (Personal Income Tax), 317 (Corporation Excise Tax), 318 (Corporation Income Tax), 320 (Amusement Device and Transient Lodging Taxes), 321 (Timber and Forestland Tax), 323 (Cigarettes and Tobacco Products Tax), the elderly rental assistance program under ORS 310.630 to 310.706, and any local taxes administered by the Department of Revenue under ORS 305.620.

4.11 Severability. The Parties agree that if any term or provision of this Contract is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the Parties shall be construed and enforced as if the Contract did not contain the particular term or provision held to be invalid.

4.12 Force Majeure. Neither party shall be held responsible for delay or default in the performance of its obligations due to a cause beyond its reasonable control, including, but not limited to fire, riot, pandemic, acts of God, terrorist acts or war where such cause was beyond such party's reasonable control. Each party shall, however, make all reasonable efforts to remove or eliminate such a cause of delay or default and shall, upon the cessation of the cause, diligently pursue performance of its obligations under the Contract.

4.13 Waiver. The failure of Owner to enforce any provision of this Contract shall not constitute a waiver by Owner of that or any other provision.

4.14 Third Party Beneficiaries. Nothing contained in this Contract shall create a contractual relationship with or a cause of action in favor of a third party against Owner or Consultant. Consultant's Services under this Contract shall be performed solely for Owner's benefit and no other entity or person shall have any claim against Consultant because of this Contract for the performance or nonperformance of Services hereunder.

4.15 Ownership of Work Product; Confidentiality.

4.15.1 Definitions. As used in this Contract, the following terms have the meanings set forth below:

4.15.1.1 "Consultant Intellectual Property" means any intellectual property that is owned by Consultant and developed independently from this Contract and that is applicable to the Services or included in the Work Product.

4.15.1.2 "Third Party Intellectual Property" means any intellectual property that is owned by parties other than Owner or Consultant and that is applicable to the Services or included in the Work Product.

4.15.1.3 “Work Product” means the Services Consultant delivers or is required to deliver to Owner under this Contract. Work Product includes every invention, discovery, work of authorship, trade secret or other tangible or intangible item and all intellectual property rights therein, and all copies of plans, specifications, reports, and other materials, whether completed, partially completed or in draft form.

4.15.2 Work Product. Except as provided in Sections 4.15.3 and 4.15.4, all Work Product created by Consultant pursuant to this Contract, including derivative works and compilations, and whether or not such Work Product is considered a “work made for hire” or an employment to invent, shall be the exclusive property of Owner. Owner and Consultant agree that such original works of authorship are “work made for hire” of which Owner is the author within the meaning of the United States Copyright Act. To the extent that Owner is not the owner of the intellectual property rights in such Work Product, Consultant hereby irrevocably assigns to Owner any and all of its rights, title, and interest in all original Work Product created pursuant to this Contract, whether arising from copyright, patent, trademark, trade secret, or any other state or federal intellectual property law or doctrine. Upon Owner’s reasonable request, Consultant shall execute such further documents and instruments necessary to fully vest such rights in Owner. Consultant forever waives any and all rights relating to original Work Product created pursuant to this Contract, including without limitation, any and all rights arising under 17 USC §106A or any other rights of identification of authorship or rights of approval, restriction or limitation on use or subsequent modifications.

4.15.3 Consultant Intellectual Property. In the event that Consultant Intellectual Property is necessary for the use of any Work Product, Consultant hereby grants to Owner an irrevocable, non-exclusive, non-transferable, perpetual, royalty-free license to use Consultant Intellectual Property, including the right of Owner to authorize contractors, consultants and others to use Consultant Intellectual Property, for the purposes described in this Contract.

4.15.4 Third Party Intellectual Property. In the event that Third Party Intellectual Property is necessary for the use of any Work Product, Consultant shall secure on Owner’s behalf and in the name of Owner, an irrevocable, non-exclusive, non-transferable, perpetual, royalty-free license to use the Third-Party Intellectual Property, including the right of Owner to authorize contractors, consultants and others to use the Third Party Intellectual Property, for the purposes described in this Contract.

4.15.5 Consultant Intellectual Property-Derivative Work. In the event that Work Product created by Consultant under this Contract is a derivative work based on Consultant Intellectual Property or is a compilation that includes Consultant Intellectual Property, Consultant hereby grants to Owner an irrevocable, non-exclusive, non-transferable, perpetual, royalty-free license to use the pre-existing elements of Consultant Intellectual Property employed in the Work Product, including the right of Owner to authorize contractors, consultants and others to use the pre-existing elements of Consultant Intellectual Property employed in a Work Product, for the purposes described in this Contract.

4.15.6 Third Party Intellectual Property-Derivative Work. In the event that Work Product created by Consultant under this Contract is a derivative work based on Third Party Intellectual Property, or is a compilation that includes Third Party Intellectual Property, Consultant shall secure on Owner’s behalf and in the name of Owner an irrevocable, non-exclusive, non-

transferable, perpetual, royalty-free license to use the pre-existing elements of the Third Party Intellectual Property employed in a Contract Work Product, including the right to authorize contractors, consultants and others to use the pre-existing elements of the Third Party Intellectual Property employed in a Contract Work Product, for the purposes described in this Contract.

4.15.7 Limited Owner Indemnity. To the extent permitted by the Oregon Constitution, Article XI, Section 7, and by the Oregon Tort Claims Act, ORS 30.260 through 30.397, Consultant shall be indemnified and held harmless by Owner from liability arising out of re-use or alteration of the Work Product by Owner which was not specifically contemplated and agreed to by the Parties in this Contract or under separate contract.

4.15.8 Consultant Use of Work Product. Consultant may refer to the Work Product in its brochures or other literature that Consultant utilizes for advertising purposes and, unless otherwise specified, Consultant may use standard line drawings, specifications, and calculations on other, unrelated projects.

4.15.9 Confidential Information. Consultant acknowledges that it or its employees, Sub-consultants, subcontractors or agents may, in the course of performing their responsibilities under this Contract, be exposed to or acquire information that is the confidential information of Owner or Owner's clients. Any and all information provided by Owner and marked confidential, or identified as confidential in a separate writing, that becomes available to Consultant or its employees, Sub-consultants, subcontractors or agents in the performance of this Contract shall be deemed to be confidential information of Owner ("Confidential Information"). Any reports or other documents or items, including software, that result from Consultant's use of the Confidential Information and any Work Product that Owner designates as confidential are deemed Confidential Information. Confidential Information shall be deemed not to include information that: (a) is or becomes (other than by disclosure by Consultant) publicly known; (b) is furnished by Owner to others without restrictions similar to those imposed by this Contract; (c) is rightfully in Consultant's possession without the obligation of nondisclosure prior to the time of its disclosure under this Contract; (d) is obtained from a source other than Owner without the obligation of confidentiality; (e) is disclosed with the written consent of Owner; or (f) is independently developed by employees or agents of Consultant who can be shown to have had no access to the Confidential Information.

4.15.10 Non-Disclosure. Consultant agrees to hold Confidential Information in strict confidence, using at least the same degree of care that Consultant uses in maintaining the confidentiality of its own confidential information, and not to copy, reproduce, sell, assign, license, market, transfer or otherwise dispose of, give, or disclose Confidential Information to third parties or use Confidential Information for any purposes whatsoever other than the provision of Services to Owner under this Contract, and to advise each of its employees, Sub-consultants, subcontractors and agents of their obligations to keep Confidential Information confidential. Consultant shall use its best efforts to assist Owner in identifying and preventing any unauthorized use or disclosure of any Confidential Information. Without limiting the generality of the foregoing, Consultant shall advise Owner immediately in the event Consultant learns or has reason to believe that any person who has had access to Confidential Information has violated or intends to violate the terms of this Contract and Consultant will at its expense cooperate with Owner in seeking injunctive or other equitable relief in the name of Owner or Consultant against any such person. Consultant agrees that, except as directed by Owner, Consultant will not at any time

during or after the term of this Contract disclose, directly or indirectly, any Confidential Information to any person, except in accordance with this Contract, and that upon termination of this Contract or at Owner's request, Consultant will turn over to Owner all documents, papers, and other matter in Consultant's possession that embody Confidential Information.

4.15.11 Injunctive Relief. Consultant acknowledges that breach of this Section 4.15, including disclosure of any Confidential Information, will give rise to irreparable injury to Owner that is inadequately compensable in damages. Accordingly, Owner may seek and obtain injunctive relief against the breach or threatened breach of this Section 4.15, in addition to any other legal remedies that may be available. Consultant acknowledges and agrees that the covenants contained herein are necessary for the protection of the legitimate business interests of Owner and are reasonable in scope and content.

4.15.12 Publicity. Consultant agrees that news releases and other publicity relating to the subject of this Contract will be made only with the prior written consent of Owner.

4.15.13 Security. Consultant shall comply with all virus-protection, access control, back-up, password, and other security and other information technology policies of Owner when using, having access to, or creating systems for any of Owner's computers, data, systems, personnel, or other information resources.

4.16 *Termination.*

4.16.1 Parties Right to Terminate by Agreement. This Contract may be terminated at any time, in whole or in part, by written mutual consent of the Parties.

4.16.2 Owner's Right to Terminate for Convenience. Owner may, at its sole discretion, terminate this Contract, in whole or in part, by written notice to Consultant specifying the termination date of the Contract.

4.16.3 Owner's Right to Terminate for Cause. Owner may terminate this Contract immediately, in whole or in part, upon written notice to Consultant, or such later date as Owner may establish in such notice, upon the occurrence of any of the following events:

4.16.3.1 In the event the Board of Commissioners of the COUNTY, in the exercise of its reasonable discretion, reduces, changes, eliminates, or otherwise modifies the funding for any of the services identified, the Consultant agrees to abide by any such decision including termination of service;

4.16.3.2 Federal, state or local laws, regulations or guidelines are modified or interpreted in such a way that either the Services under this Contract are prohibited or Owner is prohibited from paying for such Services from the planned funding source;

4.16.3.3 Consultant no longer holds all licenses or certificates that are required to perform the Services; or

4.16.3.4 Consultant fails to provide Services within the times specified or allowed under this Contract; fails to perform any of the provisions of this Contract; or so fails to perform the

Services as to endanger performance of this Contract in accordance with its terms, and after receipt of written notice from Owner, does not correct such failures within the time that Owner specifies (which shall not be less than 10 calendar days, except in the case of emergency).

4.16.4 Cessation of Services. Upon receiving a notice of termination, and except as otherwise directed in writing by Owner, Consultant shall immediately cease all activities related to the Services or the Project.

4.16.5 Consultant's Right to Terminate for Cause.

4.16.5.1 Consultant may terminate this Contract if Owner fails to pay Consultant pursuant to this Contract, provided that Owner has failed to make such payment to Consultant within fifteen (15) calendar days after receiving written notice from Consultant of such failure.

4.16.5.2 Consultant may terminate this Contract, for reasons other than non-payment, if Owner commits any material breach or default of any covenant, warranty, obligation or agreement under this Contract, fails to perform under the Contract within the time specified, or so fails to perform as to endanger Consultant's performance under this Contract, and such breach, default or failure is not cured within thirty (30) calendar days after delivery of Consultant's notice, or such longer period as Consultant may specify in such notice.

4.16.6 Delivery of Work Product/Retained Remedies of Owner. As directed by Owner, Consultant shall, upon termination, promptly deliver to Owner all documents, information, works in progress and other property that are deliverables or would be deliverables if the Contract had been completed. By Consultant's signature on this Contract, Consultant allows Owner to use Work Product and other property for Owner's intended use. The rights and remedies of Owner provided in this Section 4.16 are not exclusive and are in addition to any other rights and remedies provided by law or under this Contract.

4.16.7 Payment upon Termination.

4.16.7.1 In the event of termination pursuant to Sections 4.16.1, 4.16.2, 4.16.3.1, 4.16.3.2 or 4.16.5, Consultant's sole remedy shall be a claim for the sum designated for accomplishing the Services multiplied by the percentage of Services completed and accepted by Owner plus Consultant's reasonable Contract close-out costs, less previous amounts paid and any claim(s) which Owner has against Consultant, except in the event of a termination under Section 4.16.3.1, where no payment will be due and payable for Services performed or costs incurred after the last day of the current biennium, consistent with Section 4.3. Within thirty (30) days after termination, Consultant shall submit an itemized invoice for all un-reimbursed Services completed before termination and all Contract close-out costs actually incurred by Consultant. Owner shall not be obligated to pay for any such costs invoiced to and received by Owner later than thirty (30) days after termination. If previous amounts paid to Consultant exceed the amount due to Consultant under this subsection, Consultant shall promptly refund any excess amount upon demand.

4.16.7.2 In the event of termination pursuant to Sections 4.16.3.3 or 4.16.3.4, Owner shall have any remedy available to it in law or equity. Such remedies may be pursued separately,

collectively or in any order whatsoever. If it is determined for any reason that Consultant was not in default under Sections 4.16.3.3 or 4.16.3.4, the rights and obligations of the Parties shall be the same as if the Contract was terminated pursuant to Section 4.16.2.

4.17 Foreign Contractor. If Consultant is not domiciled in or registered to do business in the State of Oregon as of the Effective Date, Consultant shall promptly provide to the Oregon Department of Revenue and the Secretary of State's Corporation Division all information required by those agencies relative to this Contract. Consultant shall demonstrate its legal capacity to perform the Services under this Contract in the State of Oregon prior to executing this Contract.

4.18 Notice. Except as otherwise expressly provided in this Contract, any notices to be given hereunder shall be given in writing by personal delivery, facsimile, or mail, postage prepaid, to Consultant or Owner at the address or number set forth on Exhibit A, or to such other address or number as either party may provide pursuant to this "Notice" section. Any notice delivered by mail shall be deemed to be given five (5) calendar days after the date of mailing. Any notice delivered by facsimile shall be deemed to be given when the transmitting machine generates a receipt of the transmission. To be effective against Owner, any facsimile communication or notice must be confirmed by telephone notice to Owner's Representative for the Project as indicated in Exhibit A and shall not be deemed to be given until such confirmation is completed. Any notice by personal delivery shall be deemed to be given when actually delivered. Regular, day-to-day communications between the Parties may be transmitted through one of the methods set forth above, in person, by telephone, by e-mail, or by other similar electronic transmission.

4.19 Media Contacts; Confidentiality. Consultant shall provide no news release, press release, or any other statement to a member of the news media regarding this Project, without Owner's prior written authorization.

4.20 Conflict of Interest. Except with Owner's prior written consent, Consultant shall not engage in any activity, or accept any employment, interest or contribution that would, or would reasonably appear to, compromise Consultant's professional judgment with respect to this Project, including, without limitation, concurrent employment on any project in direct competition with the Project.

Exhibits A through G are attached.

MARION COUNTY STANDARD PROFESSIONAL SERVICES CONTRACT

EXHIBIT A - STATEMENT OF WORK

Owner and Consultant agree that the following Services shall be provided by Consultant for the design and construction administration of the Project. The completed Project is intended to be a functional structure and improved site that can be legally occupied and fully used for the intended functions as constructed. For purposes of this Contract, "Basic Services" are those Services described in Phases 1 through 6 of this Exhibit A, "Supplemental Services" are those Services described in Phase 7 of this Exhibit A, and "Reimbursable Expenses" are those expenses described in Section B.2 of Exhibit B- Consultant Compensation, and further defined in Section B.1.03 of Exhibit B.

PROJECT PHILOSOPHY: Consultant shall perform professional services for the design of the Project to obtain the greatest long-term value for Marion County, and to result in the prudent expenditure of public funds within the constraints of the Project program, context, and budget. In pursuing these goals, Consultant, with Owner's assistance, shall:

- a. Perform Services which are appropriate for the context of the Project and the nature of its function, both present and future.
- b. Avoid expenditures for aesthetic effect which are disproportionate when compared to the additional benefit to the Project as a whole.
- c. Help assure the Project is completed on time and within budget.
- d. Strive to reduce the construction cost of the Project while keeping life-cycle costs low.
- e. Apprise Owner throughout the Project concerning the economic impact of all design decisions.
- f. Document all Project requirements and verify, to Owner's satisfaction, that requirements are included in the Construction Documents.

PROJECT DESCRIPTION: Architectural and engineering services in support of the Project described above. Specific services may include, but not be limited to: programming/conceptual design phase, (Phase 1). The County may award additional phases to Contractor after completing programming/conceptual design phase. Additional phases may include: schematic design, design development, construction documents, bidding services, construction contract administration and supplemental services, (Phase 2 through Phase 7).

The programming/conceptual design phase shall establish the conceptual design of the Project, illustrating the scale and relationship of the Project components. This phase will define building size, configuration on site, site plan and structural system. Tasks in this phase are further described as follows:

- a. Consultant's Architecture staff shall meet with Owner to review Project requirements and program criteria.
- b. Consultant shall provide 1 virtual discovery session with Owner's stakeholder group to establish a thorough understanding of the Project's goals and objectives. This shall include reviewing the site and building components in detail, including: program

- elements with relative size/space needs; support and amenity space requirements; preliminary adjacencies, and possible orientation on the site.
- c. Consultant shall facilitate and accompany Owner and Owner's stakeholders on tours of up to 3 recently completed local facilities containing similar programmatic requirements.
 - d. Consultant shall meet once with Owner's Evidence Property Unit and stakeholder group to discuss specific space/operational needs, including information on staffing/space needs both currently and for future growth to develop a final draft program.
 - e. Consultant shall meet once with Owner's key staff to review final draft program for approval by Owner.
 - f. Consultant shall develop: floor plan, site diagram, structural system concept, and facility elevations, incorporating Owner comments from meetings and tours.
 - g. Consultant shall review with Owner floor plan, site diagram, structural system concept, and facility elevations via virtual conference call.
 - h. Consultant shall incorporate comments received from Owner into the design.

Representatives of the Parties for this Contract and the Project are:

Consultant: Jeff Humphreys Telephone: 971-346-3769

Owner: Colleen Coons-Chaffins Telephone: 503-373-4426

The Services that Consultant shall perform for each phase of the Project are described below:

A.1 PHASE 1 - BASIC SERVICES - PROGRAMMING / CONCEPTUAL DESIGN SERVICES

During the programming phase, Consultant shall provide those Basic Services necessary to refine programming, site related limitations and general requirements for the Project. Some of the described Services will be provided during this activity phase and some during other phases of Project design. Consultant's Services during Phase 1 shall consist of the following:

- A.1.01 **PROGRAMMING Services.** Consultant shall confirm and refine the program information already developed for the Project, detailing the space needs, dimensions, interrelationships, and special requirements such as telecommunications systems, access control, standby power, and security for each area of the new facility. Consultant shall gather information from Owner and Project stakeholders to identify requirements, problems, issues, expectations, and concerns, as well as Project goals. The programming information developed by Consultant shall include, but is not limited to, a list of spaces, their sizes, activities, hours of use, finishes, equipment, furniture and systems, and a brief narrative describing the relationship between spaces. Consultant shall prepare a refined program report, in an 8 1/2" X 11" format and with any drawings attached and in an 11" X 17" format, for presentation to and approval by Owner.
- A.1.02 **SITE DEVELOPMENT PLANNING Services.** Consultant shall provide preliminary site development planning Services including, but not limited to, providing an executive summary, a building analysis, and a comparative evaluation of conceptual site development designs, based on: land utilization; structures placement; facilities development; movement systems, circulation and parking; utilities and Project description; preliminary systems descriptions; code

review; master plan provisions; Owner requirements; subsurface conditions; ecological requirements; and landscape concepts.

- A.1.03 NEEDS ANALYSIS Services. Consultant shall gather information from Owner and Project stakeholders to identify requirements, problems, issues, expectations, concerns, as well as Project goals. The programming information shall include but is not limited to a list of spaces, their sizes, activities, hours of use, finishes, equipment, furniture and systems, and a brief narrative describing the relationship between spaces.
- A.1.04 ARCHITECTURAL SPACE PLANNING Services. Consultant shall provide diagrams showing functional relationships of the various program areas of the Project. Consultant shall provide an efficiency analysis of the programmed space needs.
- A.1.05 ON-SITE UTILITY STUDIES Services. Consultant shall establish requirements and prepare initial designs for on-site utilities required for the Project.
- A.1.06 OFF-SITE UTILITY STUDIES Services. Consultant shall determine the requirements for Project connections to required utilities.
- A.1.07 STATEMENT OF PROBABLE CONSTRUCTION COST Services. Consultant shall develop a probable construction cost range, +/- 20%, for the Project (the "Programming Design Phase Statement of Probable Construction Cost") based on the most recent programming information. Consultant shall arrange the costs of constituent elements in the "Construction Specification Institute" ("CSI") format and shall include the costs of systems, assemblies, and functional areas.

A.2 PHASE 2 - BASIC SERVICES - SCHEMATIC DESIGN SERVICES - RESERVED

A.3 PHASE 3 - BASIC SERVICES - DESIGN DEVELOPMENT SERVICES - RESERVED

A.4 PHASE 4 - BASIC SERVICES - CONSTRUCTION DOCUMENTS SERVICES - RESERVED

A.5 PHASE 5 - BASIC SERVICES - BIDDING SERVICES - RESERVED

A.6 PHASE 6 - BASIC SERVICES - CONSTRUCTION CONTRACT ADMINISTRATION SERVICES - RESERVED

A.7 PHASE 7 – SUPPLEMENTAL SERVICES - RESERVED

MARION COUNTY
STANDARD PROFESSIONAL SERVICES CONTRACT
EXHIBIT B - CONSULTANT COMPENSATION

B.1 BASIS OF COMPENSATION

B.1.01 Owner shall compensate Consultant for the performance of Services set forth in Exhibit A, as follows:

Consultant shall perform the Basic Services for: a maximum, not-to-exceed price of \$80,500.00

B.1.02 Payments for Services shall be made monthly, following Owner’s review and approval of detailed invoices submitted by Consultant and acceptance of the Services or approval by Owner. Payment for all Services performed shall not exceed the amounts indicated in Section B.1.03, below. Owner shall make payments only after Owner’s receipt and approval of (i) Consultant’s detailed monthly invoice as described in Section B.1.07, and (ii) all reports, designs, certificates, and documents covered by the invoice. Payments are subject to the provisions of ORS 293.462.

B.1.03 Payments for Basic Services shall be in proportion to the Services performed within Phases 1 through 6 set forth in Exhibit A. The total compensation for each Phase of the Services shall not exceed the following percentages of the total amount payable for the Services (Note: The Supplemental Services indicated in Section A.7 of Exhibit A, may or may not be provided concurrently with Phases 1 through 6. Therefore, the percentages set forth below do not include the Phase 7 Supplemental Services. Supplemental Services, if authorized, are to be billed as separate line items in accordance with Section B.1.07. Warranty Period Services, which may be included by Contract amendment, are listed separately):

Phase	Percentage	\$ Amount
Programming/Conceptual Design Services	100.0%	\$0.00
Design Development Services	0.0%	\$0.00
Construction Documents Services	0.0%	\$0.00
Bidding Services	0.0%	\$0.00
Construction Contract Administration Services	0.0%	\$0.00
Warranty Period Services	0.0%	\$0.00
Total	100.0%	\$0.00

B.1.04 RESERVED

B.1.05 RESERVED

1	
2	

B.1.06 Consultant shall not submit invoices for, and Owner will not pay, any amount in excess of the maximum, not to exceed amount payable under this Contract set forth in Section B.1.01. If this amount is increased by Contract amendment, the amendment must be effective before Consultant performs Services subject to the amendment. Consultant shall notify Owner's Representative identified in this Contract in writing of the expiration of the Contract, thirty (30) days prior to such expiration. No payment will be made for any Services performed prior to the Effective Date or after the expiration date of the Contract.

B.1.07 Consultant shall submit monthly invoices for Services performed. To be processed for payment by Owner, the invoices shall include the following basic information:

- a. The correct name of Owner's authorized representative
- b. Invoice date
- c. Date range during which the Services being invoiced for were provided
- d. The last invoice submitted on the Project must be clearly labeled "Final Invoice"
- e. Original Contract total, not to exceed amount broken out by: Basic Services, Supplemental Services released to date by line item, and Reimbursable Expenses separated by two categories of Travel Expenses and General Reimbursables
- f. Statement of changes to the original total, not to exceed amount by amendment(s) and broken out in the same way as in item F, showing the revised Contract amounts
- g. Paid to date amounts showing the amounts submitted for prior to the current invoice (regardless of payment status) and broken out the same way as in item F
- h. Amounts being invoiced for in the current invoice and broken out the same way as in item F, with a roll up of a "Total Amount Billed For This Invoice" line item amount
- i. Balances Remaining after receipt of payment for the current invoice broken out the same way as in item F

Consultant shall describe all Services performed with particularity and by whom it was performed and shall itemize and explain all expenses for which reimbursement is claimed. Reimbursable Expenses shall be broken out into to line-item categories, 1) Travel Expenses and 2) General Reimbursable Expenses. Invoices for Basic Services under a specific Phase shall be for completed Basic Services only and shall indicate the percentage of the total Basic Services for that Phase that the amount invoiced represents. Invoice amounts for authorized fixed price Supplemental Services shall indicate the Supplemental

Service, its contract reference number, the total amount of the fixed price Supplemental Service, and the total percentage and related dollar amount of the fixed price Supplemental Service completed by the end of the current invoice period, less the total dollar amount previously billed for, with the balance representing the total amount being currently billed for. Invoices for authorized Supplemental Services based on a not to exceed amount shall set forth the number of hours worked by Consultant's personnel on the identified Service, describe the Services performed by each such personnel in detail on a daily basis, and set forth the rate of compensation for each of such personnel as set forth in EXHIBIT F.

Consultant shall send invoices to Owner's Representative identified in this Contract, using the following address:

MCBS-billing@co.marion.or.us

Consultant shall not indicate or invoice for any past due amounts in the current invoice. All such notifications of a past due amount must be handled by a separate Statement of Account.

Owner shall have the right to reject any invoice which does not have the proper information as required by this section without incurring penalty liabilities for late payment.

B.1.08 Owner and Consultant agree in accordance with the terms and conditions of this Contract that:

- a. If the scope of the Project or the Services are changed materially, Consultant shall request in writing an amendment to the Contract before additional Services are provided and before compensation is adjusted. All legally required approvals must be obtained for any Contract amendment before the amendment is effective and before Services may be performed or payment made under the amendment.
- b. Consultant's fee for preparing routine change orders adding or deleting Services from the Project shall be included in the maximum not-to-exceed amount for Basic Services stated in Section B.1.03.
- c. Upon Owner's request and without additional compensation, Consultant shall make such revisions to completed Contract Documents as are necessary to correct errors or omissions appearing therein, in accordance with the standard of care described in Section 2.1.1 of Consultant's Responsibilities; Representations and Warranties.

B.2 REIMBURSABLE EXPENSES -

B.2.01 Reimbursable Expenses are in addition to compensation for Services and shall not exceed the maximum amount stated in Section B.1.05 without prior authorization by Owner. This amount is separated into two categories, Travel Expenses and General Reimbursable Expenses, as outlined below. Reimbursable Expenses include actual, allowable and reasonable expenditures made by Consultant and Consultant's employees in performing the Services required in Exhibit A. Reimbursable Expenses must be evidenced by copies of actual third-party invoices or receipts delivered to Owner to qualify for reimbursement and are limited to the types of actual expenses listed below.

- a. General Reimbursable Expenses consist of:
 - i. Long distance communications.

- ii. Reproductions, postage and handling of drawings and specifications and other documents, excluding reproductions of drawings, specifications and other documents used by Consultant and Consultant's subconsultants.
 - iii. Data processing and photographic production techniques when used in connection with Supplemental Services.
 - iv. Third-party models and mockups requested by Owner.
 - v. The printing of master or reproducible sets of plans and project manuals including specifications.
 - vi. Plan check fees.
- b. Travel Expenses:

All travel shall be allowed only when the travel is essential to the normal discharge of Consultant's responsibilities under the Contract. All travel shall be conducted in the most efficient and cost-effective manner resulting in the best value to the Owner. The travel must comply with all the requirements set forth in this section and must be for official Marion County business only. Personal expenses shall not be authorized at any time. All expenses are included in the total maximum Contract amount stated in Section B.1.01.

Current approved rates are as follows:

- i. Mileage. Mileage for travel in a private automobile, while Consultant is acting within the course and scope of his/her duties under this Contract and driving over the most direct and usually traveled route, will be reimbursed at a rate of 62.5 cents per mile. To qualify for mileage reimbursement, Consultant must hold a valid, current driver's license for the class of vehicle to be driven and carry personal automobile liability insurance in amounts not less than those required by (i) the Oregon Financial Responsibility Law (ORS 806.060) or (ii) the jurisdiction in which the vehicle is being operated, whichever is greater. No mileage reimbursement will be paid for the use of motorcycles or mopeds.
- ii. Meals. Receipts are required for reimbursement.

Owner will not pay any mark up over actual allowable reimbursement costs. Any costs associated with recordkeeping or labor to create reproductions of receipts is considered indirect overhead and therefore part of Consultant's Professional Hourly Rates.

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EXHIBIT C - INSURANCE PROVISIONS

A. **REQUIRED INSURANCE.** Contractor shall obtain at Contractor's expense the insurance specified in this section prior to performing under this Contract and shall maintain it in full force and at its own expense throughout the duration of this Contract and all warranty periods. Contractor shall obtain the following insurance from insurance companies or entities that are authorized to transact the business of insurance and issue coverage in Oregon and that are acceptable to County:

i. **WORKERS COMPENSATION.** All employers, including Contractor, that employ subject workers, as defined in ORS 656.027, shall comply with ORS 656.017 and shall provide workers' compensation insurance coverage for those workers, unless they meet the requirement for an exemption under ORS 656.126(2). Contractor shall require and ensure that each of its subcontractors complies with these requirements.

ii. **PROFESSIONAL LIABILITY.** Covering any damages caused by an error, omission or any negligent acts related to the services to be provided under this Contract. Contractor shall provide proof of insurance of not less than the following amounts as determined by the County:

☒ **Required by County** ☐ **Not required by County.**

- ☒ \$1,000,000 Per occurrence limit for any single claimant; and
- ☒ \$2,000,000 Per occurrence limit for multiple claimants
- ☐ Exclusion Approved by Risk Manager

iii. **CYBER LIABILITY.** Covering network security, breach of data, and coverage for regulatory fines and fees imposed against County due to failures in products and services provided under this Contract. Cyber Liability coverage must include errors, omissions, negligent acts, denial of service, media liability (including software copyright), dishonesty, fraudulent or criminal acts by a person or persons whether identified or not, intellectual property infringement, computer system attacks, unauthorized access and use of computer system, regulatory actions, and contractual liability.

☐ **Required by County** ☒ **Not required by County.**

- ☐ \$2,000,000 Per occurrence limit for any single claimant; and
- ☐ \$5,000,000 Per occurrence limit for multiple claimants
- ☐ Exclusion Approved by Information Technology Director and Risk Manager

iv. **COMMERCIAL GENERAL LIABILITY.** Covering bodily injury, death, and property damage in a form and with coverages that are satisfactory to the County. This insurance shall include personal injury liability, products and completed operations. Coverage shall be written on an occurrence basis. Contractor shall provide proof of insurance of not less than the following amounts as determined by the County:

☒ **Required by County** ☐ **Not required by County.**

Minimum Limits:

- ☒ \$1,000,000 Per occurrence limit for any single claimant; and
- ☒ \$2,000,000 Per occurrence limit for multiple claimants
- ☐ Exclusion Approved by Risk Manager
- ☐ \$500,000 Per occurrence limit for any single claimant
- ☐ \$1,000,000 Per occurrence limit for multiple claimant

v. AUTOMOBILE LIABILITY INSURANCE. Covering all owned, non-owned, or hired vehicles. This coverage may be written in combination with the Commercial General Liability Insurance (with separate limits for "Commercial General Liability" and "Automobile Liability"). Contractor shall provide proof of insurance of not less than the following amounts as determined by the County:

☒ **Required by County** ☐ **Not required by County.**

Minimum Limits:

- ☒ Oregon Financial Responsibility Law, ORS 806.060 (\$25,000 property damage/\$50,000 bodily injury \$5,000 personal injury).
- ☐ \$500,000 Per occurrence limit for any single claimant; and
- ☐ \$1,000,000 Per occurrence limit for multiple claimants
- ☐ Exclusion Approved by Risk Manager

B. ADDITIONAL INSURED. The Commercial General Liability insurance required under this Contract shall include Marion County, its officers, employees, and agents as Additional Insureds but only with respect to Contractor's activities to be performed under this Contract. Coverage shall be primary and non-contributory with any other insurance and self-insurance.

C. NOTICE OF CANCELLATION OR CHANGE. There shall be no cancellation, material change, potential exhaustion of aggregate limits or non-renewal of insurance coverage(s) without 30 days written notice from this Contractor or its insurer(s) to County. Any failure to comply with the reporting provisions of this clause shall constitute a material breach of Contract and shall be grounds for immediate termination of this Contract by County.

D. CERTIFICATE(S) OF INSURANCE. Contractor shall provide to County Certificate(s) of Insurance for all required insurance before delivering any Goods and performing any Services required under this Contract. The Certificate(s) must specify all entities and individuals who are endorsed on the policy as Additional Insured (or Loss Payees). Contractor shall pay for all deductibles, self-insured retention, and self-insurance, if any.

MARION COUNTY
STANDARD PROFESSIONAL SERVICES CONTRACT
EXHIBIT D - SPECIAL CONTRACT PROVISIONS

D.1 RESPONSIBILITIES OF OWNER

- D.1.01 Owner's Project budget shall include contingencies for design, bidding, changes in the Work during construction, and other costs described below.
- D.1.02 Owner, at Owner's sole option, may retain an inspector to inspect the Project in order to protect Owner's interests. The costs of the inspector are to be paid by Owner and the inspector shall serve at the pleasure of Owner. When retained by Owner, the inspector's duties are not to be interpreted as conflicting with the duties of Consultant or relieving Consultant of any responsibility or duty incurred under this Contract, nor may the inspector act as Consultant's agent.
- D.1.03 Owner shall furnish to Consultant a certified land survey, soils report of the building site, and other related information as Owner deems necessary.
- D.1.04 Owner shall furnish to Consultant a Hazardous Material Survey, and any subsequent testing and/or abatement as may be required.
- D.1.05 Owner shall furnish to Consultant structural, mechanical, chemical and other laboratory tests, inspections and reports as required by law or the Contract Documents.
- D.1.06 Owner shall be responsible for payment of all plan check fees, review fees, permit fees, taxes, development charges, or any other costs related to obtaining governing bodies' approval for construction of the Project.

D.2 PROJECT RESPONSIBILITIES

- D.2.01 Consultant shall prepare a schedule of its activities through all phases of the Project. Consultant shall schedule and prepare agendas for all meetings which involve Consultant's Services. Consultant shall chair such meetings and shall record and distribute minutes, in a format and level of detail acceptable to Owner, of decisions and actions to attendees.
- D.2.02 Consultant shall confirm firsthand, through site investigations of the observable circumstances and existing conditions, the critical issues that may impact design criteria and shall not rely solely on furnished As Built documents. Consultant shall be liable, at Owner's discretion, for any cost change impacts as a result of using inaccurate As Built drawings which, if used solely for the design process without confirmation, create conflicts on site.
- D.2.03 The "maximum allowable construction cost" shall be the total cost or estimated cost to Owner of all elements of the Project designed or specified by Consultant in the Construction Documents Phase Statement of Probable Construction Costs prepared pursuant to Section A.4. PHASE 4 of Exhibit A, excluding equipment supplied by Owner, and delineated in outline form according to the industry standard CSI 16 divisions of the Work, excluding equipment supplied

by Owner. Construction cost does not include the compensation of Consultant and Sub-consultants, the cost of the land, rights of way, or other costs which are the responsibility of Owner. If the fixed limit of the maximum allowable construction cost is exceeded by the lowest bona fide bid for construction of the Project, Owner, at its discretion, shall (i) give written approval of an increase in such fixed limit, (ii) authorize re-bidding of the Project within a reasonable time, (iii) if the Project is abandoned, terminate the bid process, or (iv) cooperate in revising the Project scope and quality as required to reduce the construction cost. In the case of (iv), Consultant, without additional charge, shall modify the drawings and specifications as necessary to comply with the fixed limit. The providing of such Service shall be the limit of Consultant's responsibility arising from the establishment of such fixed limit, and having done so, Consultant shall be entitled to compensation for all Services performed in accordance with this Contract, whether or not the Construction Phase is commenced.

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EXHIBIT E - CRITICAL DATE SCHEDULE

Programming/Conceptual Design Complete	November 1, 2022
Schematic Design Complete - RESERVED	
Design Development Complete - RESERVED	
Construction Documents Complete - RESERVED	
Construction Contract Award - RESERVED	
Substantial Completion - RESERVED	
Final Completion - RESERVED	
Warranty Period Complete - RESERVED	

MARION COUNTY
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EXHIBIT F– RATE SCHEDULE

MACKENZIE.

P 503.224.9000 • F 503.228.1288 • W MCKENZIE.COM
 RiverEast Center, 10000 West Avenue, 1000 Portland, OR 97201

City of Marion • Marion County • Washington County • Clatsop County

HOURLY BILLING RATE SCHEDULE*

PRINCIPALS	\$ 160 – \$ 290
ARCHITECTURE/LANDSCAPE	
Design Director	\$ 190 – \$ 235
Senior Project Architect	\$ 160 – \$ 260
Project Architect I – III	\$ 100 – \$ 210
Architectural Designer II-III	\$ 90 – \$ 175
Architectural Designer I	\$ 65 – \$ 100
Designer/Drafter	\$ 50 – \$ 80
Intern	\$ 50 – \$ 75
ENGINEERING	
Senior Project Engineer	\$ 160 – \$ 250
Project Engineer I – III	\$ 100 – \$ 200
Designer I – II	\$ 75 – \$ 155
Transportation Analyst I – II	\$ 65 – \$ 115
Designer/Drafter	\$ 85 – \$ 140
Intern	\$ 55 – \$ 85
PLANNING	
Senior Project Planner	\$ 150 – \$ 235
Project Planner I – IV	\$ 90 – \$ 210
Permit Coordinator	\$ 55 – \$ 95
Assistant Planner	\$ 70 – \$ 110
Intern	\$ 50 – \$ 75
INTERIOR DESIGN	
Senior Project Interior Designer	\$ 150 – \$ 230
Interior Designer III – V	\$ 100 – \$ 175
Interior Designer I – II	\$ 70 – \$ 135
Intern	\$ 50 – \$ 75
ADMINISTRATION	
Administrator	\$ 60 – \$ 175
Word Processor	\$ 70 – \$ 110
Graphic Artist	\$ 85 – \$ 130

*Subject to change April 2023

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**MARION COUNTY
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EXHIBIT G - ASSUMPTIONS AND EXCLUSIONS - RESERVED