

# Modification of Agreement - #5

## Consultant Contracts

This Agreement is made this 28<sup>th</sup> day of April, 2015, in the City and County of San Francisco.

Whereas, the City & County of San Francisco and Montgomery Corporation, have entered into an Agreement for Inspector of Record Inspection Services for the San Francisco General Hospital Rebuild Program and

Whereas, the parties now desire to modify the Agreement as described in Attachment #1, now, therefore the parties agree as follows.

### The City will:

Add  Deduct the sum of \$ 1,665,000 for changes described in the referenced attachment.

Add  Subtract 0 calendar days To  From  the original Agreement or the latest modification as described in the referenced attachment.

In all other respects, the original Agreement and all modifications thereto shall remain in full force and effect.

**CITY & COUNTY OF SAN FRANCISCO**

**CONSULTANT**

Recommended

\_\_\_\_\_  
Ronald Alameida, Contract (or Project) Manager

\_\_\_\_\_  
Montgomery Corporation  
Name of Consultant Firm

\_\_\_\_\_  
Edgar Lopez/Julia Laue  
Division (or Bureau) Manager

\_\_\_\_\_  
120 Montgomery St., Suite 715  
Address

Approved

\_\_\_\_\_  
Edgar Lopez/Julia Laue  
Deputy Director

\_\_\_\_\_  
San Francisco, CA 94104  
City, State, Zip

\_\_\_\_\_  
Mohammed Nuru, Director of Public Works

\_\_\_\_\_  
By (Signature)

Approved as to Form:  
Dennis J. Herrera  
City Attorney

\_\_\_\_\_  
By Deputy City Attorney

\_\_\_\_\_  
Type Name & Title

## **CONTRACT MODIFICATION #5**

### **ATTACHMENT #1**

Pursuant to Section 4 (Services Contractor Agrees to Perform) and Section 5 (Compensation) of the Agreement (DPW Order No.: 179,031) between the City and County of San Francisco, hereinafter referred to as "City" and Montgomery Corporation, hereinafter referred to as "Consultant", the amount of the Agreement shall be increased by \$1,665,000 (One Million Six Hundred Sixty-Five Thousand Dollars) for providing inspector of record inspection services for the San Francisco General Hospital Rebuild Program.

This Attachment #1 stipulates that the following scopes (below) shall be incorporated into the Agreement between the City and Consultant. All terms and conditions of the Agreement that are not changed, altered or modified by this Modification #5 shall remain in full force and effect.

#### **ADDED SCOPE OF WORK:**

1. Supplemental funding for estimated level of effort for providing inspector of record inspection services for the period of July 1, 2015 through April 30, 2016.
2. Memorialize the Consultant's billing fee schedules per the annual percentage change of the Consumer Price Index (CPI) in accordance with the contract provisions (Appendix B of the Original Contract)
3. Appendix A – Scope of Work
4. Appendix B – Revised Consultant Fee Schedule (Effective March 2015)
5. Exhibit 1 – Montgomery Corporation Letter dated April 27, 2015 with updated level of effort projections.
6. Exhibit 2 – Montgomery Corporation Letter dated March 10, 2015 requesting for CPI Fee Adjustment.

**COMPENSATION:** Professional service fees for this contract shall increased by ONE MILLION SIX HUNDRED SIXTY-FIVE THOUSAND DOLLARS (\$1,665,000) resulting in a revised total of a not-to-exceed fee of ELEVEN MILLION SIX HUNDRED TEN THOUSAND EIGHT HUNDRED SIXTY-SIX DOLLARS (\$11,610,866).

**CONTRACT DURATION:** The contract duration for services under the Agreement shall remain unchanged.

**BILLING PROCEDURES:** Billing procedures remain unchanged.

## APPENDIX A

### SCOPE OF WORK

1. The previous modification (Contract Modification #4) was certified on February 4, 2015 to allocate funding for the Inspector of Record ("IOR") Contract for the period from January 2015 through December 2015. Based on the current expenditure and the forecasted work remaining for the year ending 2015, it is anticipated that the contract sum approved through Contract Mod #4 will be exceeded.
2. This modification recognizes that supplemental funding will be required in order for the Consultant to continue providing IOR inspection services through April 2016 in order to not delay the overall project schedule.
3. The factors that are driving the Consultant to increase their inspection resources beyond the originally budgeted amounts are based on the following reasons: (1) OSHPD demand for additional IORs to support the inspection services for various Project Increments; (2) unanticipated Construction Manager/General Contractor (CM/GC)'s aggressive work schedule, including double shifts and weekend work (3) unavailability of City staff with IOR certification to assist with inspection work, and (4) this consultant will continue to provide IOR inspection services in support of the Phase 2 – Service Building Modification/Emergency Generator Project.
4. The Consultant's estimated level of effort for the period from July 2015 through April 2016 is outlined in Exhibit 1, and the contract modification amount is distributed to the Consultant's Team as follows:

**APPENDIX B**

**Revised Consultant Fee Schedules  
 (Effective March 2015)**

*(Billing Rate Adjustments based on annual Consumer Price Index "CPI")*

	<u>Position</u>	<u>Company</u>	<u>2011 Base Rates</u>	<u>Feb. 2013 - Jan. 2014 Rates</u>	<u>Feb. 2014 - Feb. 2015 Rates</u>	<u>Mar. 2015 - Jan. 2016 Rates</u>
	-			2.90%	2.10%	2.60%
1	Principal	Montgomery (Prime)	\$ 175.90	\$ 181.00	\$ 184.80	\$ 189.61
2	Lead IOR / IOR	Montgomery (Prime)	\$ 165.31	\$ 170.10	\$ 173.68	\$ 178.19
3	Project Coordinator	Montgomery (Prime)	\$ 99.50	\$ 102.39	\$ 104.54	\$ 107.26
4	Contract Administrator	Montgomery (Prime)	\$ 96.43	Not Used	Not Used	Not Used
5	Administrative Supervisor	Montgomery (Prime)	\$ 96.43	Not Used	Not Used	Not Used
6	Administrative / Clerical Support	Montgomery (Prime)	\$ 91.98	Not Used	Not Used	Not Used
7	Document Control Tech I	Chaves & Associates (LBE)	\$ 86.68	No Change	No Change	No Change



**MONTGOMERY**  
CORPORATION

April 27, 2015

Attn: Ronald Alarcida  
City and County of San Francisco  
1001 Potrero Ave.  
Building 40, 3<sup>rd</sup> Floor,  
San Francisco, CA 94110

RE: SFGH Rebuild Project – Contract Modification #5 - Request for Supplemental  
Funding for the Inspector of Record Inspection Services Contract (6694A)

Dear Ron,

Please accept this letter as our request for a contract modification to increase the contract sum for the Inspector of Record (“IOR”) Inspection Services for the San Francisco General Hospital Rebuild Program Contract in order to provide continued inspection services. We are requesting an additional \$1,665,000 be added to our existing contract to supplement the remaining funding in our contract to provide IOR services. The additional funds will cover double shifts and overtime as required by the Contractor in effort toward Project Substantial Completion.

We will continue to monitor our expenditures and balance the IOR workload with the Contractor’s schedule to ensure efficiency and to work within our allotted budget.

If you have any questions please feel to call me at 415.517-2608.

Thank you,

A handwritten signature in black ink, appearing to read 'Scott Montgomery'.

Scott Montgomery  
Principal

EXHIBIT 1

**Montgomery Corporation - Inspector of Record (IOR) Inspection Services Contract**  
Proposed Contract Modification

CURRENT CONTRACT COST SUMMARY	
	Total
Original Contract Sum:	\$ 3,998,607
COs to Date:	\$ 5,947,259
Revised Contract Sum:	\$ 9,945,866
Payment to Date (Thru 3/2015):	\$ 8,826,043
Funds Remaining in Current Contract:	\$ 1,119,823

PROPOSED CONTRACT MODIFICATION	
	Total
Revised Contract Sum:	\$ 9,945,866
Proposed CO Amount:	\$ 1,665,000
Revised IOR Contract:	\$ 11,610,866

Projects	Fundings Remaining in Current Contract (as of March 2015)			Proposed Contract Modification											
	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16	Apr-16	Subtotal	
SFGH Rebuild Project (New Hospital)	\$ 350,000	\$ 350,000	\$ 350,000	\$ 350,000	\$ 165,000	\$ 165,000	\$ 165,000	\$ 165,000	\$ 165,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 1,315,000	
Building 5 Bridge and Tunnel Renovation		\$ 35,000	\$ 34,823	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 350,000	
	\$ 350,000	\$ 385,000	\$ 384,823	\$ 385,000	\$ 200,000	\$ 200,000	\$ 200,000	\$ 200,000	\$ 200,000	\$ 200,000	\$ 70,000	\$ 70,000	\$ 70,000	\$ 70,000	\$ 1,665,000
			\$ 1,119,823												



**MONTGOMERY**  
CORPORATION

March 10, 2015

ATTN: Ron Alameida  
City and County of San Francisco  
3<sup>rd</sup> Floor, Building 40  
1001 Potrero Ave.  
San Francisco, CA 94952

RE: SFGH Rebuild Project – Request for Consumer Price Index Fee Adjustment

Dear Ron,

Please accept this letter as our hourly rate increase in accordance with consumer price index (CPI). Per our existing contract, attached is the bureau of labor statistics (BLS) tables and calculations per the BLS website as specified.

Position	Old Rate	New Rate as of Feb 1 <sup>st</sup> 2015
Principal	\$184.80	<del>\$189.60</del>
Lead/IOR	\$173.67	\$178.19
Project Coordinator	\$104.54	\$107.26

#189.61  
MD  
3.10.15

If you have any questions, please feel free to call me at (415) 517-2608.

Thank you,

Scott Montgomery  
Principal

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# Databases, Tables & Calculators by Subject

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## Consumer Price Index - Urban Wage Earners and Clerical Workers

Series Id: CWURA422SA0,CWUSA422SA0  
 Not Seasonally Adjusted  
 Area: San Francisco-Oakland-San Jose, CA  
 Item: All items  
 Base Period: 1982-84=100

Download: .xlsx

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual	HALF1	HALF2
2004		194.1		194.7		195.4		195.0		196.4		195.9	195.0	194.4	195.7
2005		197.3		199.3		197.5		199.5		202.6		199.3	199.1	197.9	200.3
2006		202.5		204.9		205.2		206.7		206.2		205.6	204.9	203.7	206.1
2007		208.803		211.189		211.422		211.620		213.133		214.204	211.370	209.986	212.754
2008		214.913		217.913		221.454		221.385		221.192		213.685	218.441	217.487	219.396
2009		216.797		218.587		220.996		221.279		221.708		220.121	219.645	218.182	221.109
2010		222.049		223.821		224.185		224.195		224.352		224.152	223.624	223.012	224.236
2011		226.638		231.600		230.605		231.445		232.371		231.109	230.337	229.074	231.600
2012		234.648		236.626		236.890		238.445		240.864		236.454	237.097	235.572	238.622
2013		240.262		241.764		243.052		242.903		243.711		242.602	242.125	241.141	243.109
2014		245.148		247.932		250.085		249.877		250.508		247.680	248.326	247.097	249.555

## 12-Month Percent Change

Series Id: CWURA422SA0,CWUSA422SA0  
 Not Seasonally Adjusted  
 Area: San Francisco-Oakland-San Jose, CA  
 Item: All items  
 Base Period: 1982-84=100

Download: .xlsx

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Annual	HALF1	HALF2
2004		0.2		0.6		1.7		1.4		2.3		2.5	1.4	0.8	2.0
2005		1.6		2.4		1.1		2.3		3.2		1.7	2.1	1.8	2.4
2006		2.6		2.8		3.9		3.6		1.8		3.2	2.9	2.9	2.9
2007		3.1		3.1		3.0		2.4		3.4		4.2	3.2	3.1	3.2
2008		2.9		3.2		4.7		4.6		3.8		-0.2	3.3	3.6	3.1
2009		0.9		0.3		-0.2		0.0		0.2		3.0	0.6	0.3	0.8
2010		2.4		2.4		1.4		1.3		1.2		1.8	1.8	2.2	1.4
2011		2.1		3.5		2.9		3.2		3.6		3.1	3.0	2.7	3.3
2012		3.5		2.2		2.7		3.0		3.7		2.3	2.9	2.8	3.0
2013		2.4		2.2		2.6		1.9		1.2		2.6	2.1	2.4	1.9
2014		2.0		2.6		2.9		2.9		2.8		2.1	2.6	2.5	2.7