

HARBORTOWN HOA



San Mateo, CA

October 21, 2024



Jay Grant



Thomas Daniel





Thomas Daniel

QUALIFICATIONS

- **BS in Business Administration & Accounting from The Citadel Military College of South Carolina.**
- **Veteran, US Army Officer, Military Intelligence, 101st Airborne Division**
- **Unlimited General Contractors License in South Carolina and Tennessee from 2001-2011, specializing in Insulated Concrete Form Construction building Single Family Residential Homes, Condominiums, and Townhomes.**
- **MA Construction Supervisors License, 2011 – 2024**
 - *Completed over **300 Building Envelope Investigation and Evaluations** with condominium and homeowner associations*
 - *Completed over **100 Building Envelope Replacement Projects** for condominium and homeowner associations, exceeding \$500-million in Revenue*
- **Currently hold a California, B-2 Contractor's license**
 - *Planned, specified the scope and priced the **Building Envelope Replacement Project** at **Pointe Pacific in Daly City, CA***

AGENDA

- 1) Progress Update
- 2) What is a Building Envelope System?
- 3) WJE Report – SB326
- 4) Avelar request and scope of work
- 5) Review Deck Bid Results
- 6) What does proceeding with the Avelar Bid look like?
- 7) Suggested questions for Avelar and Bidders
- 8) Where do we go from here - Next steps

Progress Update

Imagery & Takeoffs

Structure 1
 Total Siding Area - 7,337.6 SF
 Horizontal Lap - 1,923.3 SF
 Shake Siding - 5,415.3 SF
 Starter Strip - 490.2 SF
 Fascia/Soffit - 528.6 SF
 Frieze Board - 52.6 SF
 Door Wrap - 308.0 SF
 Window Wrap - 332.0 LF
 Inside Corner - 101.6 LF
 Outside Corner - 667.2 LF

Auxiliary Areas
 Total Area - 9,230.4 SF
 Starter Strip - 490.2 LF
 Fascia/Soffit - 528.6 LF
 Frieze Board - 52.6 LF
 Door Wrap - 308.0 LF
 Window Wrap - 332.0 LF
 Inside Corner - 101.6 LF
 Outside Corner - 667.2 LF

of Windows - 16
 # of Doors - 20
 # of Garage Doors - 12

siding type, color	UNIT Addresses	# of Homes	Bldg #
Shingle	07721874,0576,0578,0580,0582,0584,0586,0588,0590,0592,0594,0596,0598	12	Building - 5
Shingle	1302,1304,1306,1308,1310,1312,1314,1316,1318,1320,1322	12	Building - 10
Clapboard	0577,1074,1076,1078,1080,1082,1084,1086,1088,1090,1092,1094,1096,1098,1100,1102,1104,1106,1108,1110,1112,1114,1116,1118,1120,1122,1124,1126,1128,1130,1132,1134,1136,1138,1140,1142,1144,1146	12	Building - 13
Clapboard	1124,1126,1128,1130,1132,1134,1136,1138,1140,1142,1144,1146	12	Building - 15
Clapboard	1124,1126,1128,1130,1132,1134,1136,1138,1140,1142,1144,1146	12	Building - 31
Clapboard	0610,02,04,06,08,10,12,14,16,18,20,22,24,26,28,30,32	12	Building - 2
Shingle	0743,02,04,06,08,10,12,14,16,18,20,22,24,26,28,30,32	12	Building - 3
Clapboard	0610,02,04,06,08,10,12,14,16,18,20,22,24,26,28,30,32	12	Building - 4
Clapboard	0610,02,04,06,08,10,12,14,16,18,20,22,24,26,28,30,32	12	Building - 7
Clapboard	0610,02,04,06,08,10,12,14,16,18,20,22,24,26,28,30,32	12	Building - 8
Clapboard	0610,02,04,06,08,10,12,14,16,18,20,22,24,26,28,30,32	12	Building - 9
Clapboard	0224,1024,1026,1028,1030,1032,1034,1036,1038,1040,1042,1044,1046	12	Building - 11
Shingle	0224,1024,1026,1028,1030,1032,1034,1036,1038,1040,1042,1044,1046	12	Building - 12
Shingle	1104,1102,1104,1106,1108,1110,1112,1114,1116,1118,1120,1122,1124,1126,1128,1130,1132,1134,1136,1138,1140,1142,1144,1146	12	Building - 14
Shingle	1104,1102,1104,1106,1108,1110,1112,1114,1116,1118,1120,1122,1124,1126,1128,1130,1132,1134,1136,1138,1140,1142,1144,1146	12	Building - 16
Shingle	1104,1102,1104,1106,1108,1110,1112,1114,1116,1118,1120,1122,1124,1126,1128,1130,1132,1134,1136,1138,1140,1142,1144,1146	12	Building - 19
Shingle	1104,1102,1104,1106,1108,1110,1112,1114,1116,1118,1120,1122,1124,1126,1128,1130,1132,1134,1136,1138,1140,1142,1144,1146	12	Building - 21
Shingle	1302,1304,1306,1308,1310,1312,1314,1316,1318,1320,1322,1324,1326,1328,1330,1332,1334,1336,1338,1340,1342,1344,1346	12	Building - 23
Shingle	1302,1304,1306,1308,1310,1312,1314,1316,1318,1320,1322,1324,1326,1328,1330,1332,1334,1336,1338,1340,1342,1344,1346	12	Building - 25
Clapboard	0743,02,04,06,08,10,12,14,16,18,20,22,24,26,28,30,32	12	Building - 26
Shingle	0001,1002,1004,1006,1008,1010,1012,1014,1016,1018,1020,1022,1024,1026,1028,1030,1032,1034,1036,1038,1040,1042,1044,1046,1048,1050,1052,1054,1056,1058,1060,1062,1064,1066,1068,1070,1072,1074,1076,1078,1080,1082,1084,1086,1088,1090,1092,1094,1096,1098,1100,1102,1104,1106,1108,1110,1112,1114,1116,1118,1120,1122,1124,1126,1128,1130,1132,1134,1136,1138,1140,1142,1144,1146	12	Building - 28
Shingle	1104,1102,1104,1106,1108,1110,1112,1114,1116,1118,1120,1122,1124,1126,1128,1130,1132,1134,1136,1138,1140,1142,1144,1146	12	Building - 30

Specifications, Material (\$), Labor (\$)

[B-1]. VINYL & COMPOSITE SIDING OPTION SPECIFICATION -

- 121 Determine and Dispose of existing Clapboard siding, trim, underlayment and sheathing down to wall sheathing. 2,078.77 Square
- 122 Determine and Dispose of existing Shingle siding, trim, underlayment and sheathing down to wall sheathing. 2,377.50 Square
- 123 Installation of 2 1/2" Cortex Framed Window/Door at Inside & Outside Corners and Base of Wall 35,343.00 Linear Foot
- 124 Install 1 1/2" Trim Windows and Door Trim 5,336.00 Linear Foot
- 125 Install Exterior "Everbrite" Composite Trim Weatherstriation System and base of same [Commercial and 3 1/2" Stem Tape] 5,336.00 Square
- 126 Install Exterior "Everbrite" Trim at Windows/Door Framing 40,395.00 Linear Foot
- 127 Install new ADA Accessible 2-Threshold (as required by Historical Trim) as well as under-throw cap - properly integrated with the Tyvek Commercial Strip 11,638.00 Linear Foot
- 128 Install new CUSTOM BENT 302 Aluminum Z-Finishing at Window and Door Heads - properly integrated with the Tyvek Commercial Wrap 14,968.17 Linear Foot
- 129 VINYL SIDING - Install new CertainTeed Managrip D4 clapboard style vinyl siding (assume 50% Standard length) - STANDARD COLORS (no colors or premium colors included). 2,678.77 Square
- 130 Misc. Vinyl Siding Accessories: vinyl starter, vinyl 1/2" channel, underl, inside corner, butters and misc. items required to properly install vinyl siding. 2,078.77 Square

COMPOSITE SIDING - Install new CertainTeed Cedar Impressions - 5" Straight Edge siding - STANDARD COLORS (no deluxe or premium colors included). 2,377.50 Square

Misc. Siding Accessories: vinyl starter, vinyl 1/2" channel, underl, inside corner, butters and misc. items required to properly install vinyl siding. 2,377.50 Square

Install new Vinyl Door Vents (do not include piping or heating - VPS has assumed existing chair seats and functioning at door vents and properly working, and connect at the trimmer) - assumed 2 vent per home. 32.00 Piece
- 144 Install new Mounting Brackets for exterior lights. (NOT: New exterior lights not included. Assume 1 per home. 664.00 Each
- 145 ELECTRICIAN: Anderson Boxes 622.00 Each
- 146 ELECTRICIAN: Exterior Lights 92.00 Each
- 147 ELECTRICIAN (SWAC Electrical) 524.00 Each
- 148 ELECTRICIAN: Electric Meter 154.00 Each

[B-1]. VINYL & COMPOSITE SIDING OPTION SPECIFICATIONS TOTAL \$ 10,722,200.00

[B-2]. VINYL SOFFITS/CEILING & AZEK PVC TRIM (Smooth Finish & white) SPECIFICATION -

- 014 Install new CertainTeed Soffit - 2 1/2" Vinyl Soffit - central (includes associated channel and/or fascia) - White 35,351.00 Linear Foot
- 015 Install new Azek Beaded PVC Ceiling - White - finished with Cortex Sides and Plugged 5,000.00 Square Foot
- 016 Install new Azek Cove and Azek PVC Outside Corner Boards: 5 1/2" x 4 1/2" "QUICK CORNER" beaded both sides with rabbet flanges 21,792.00 Linear Foot
- 017 CertainTeed Cedar Impressions - Single 5" siding to outside corners 30,907.00 Linear Foot
- 018 Install new Azek PVC Shoe Stalk at Electric Meter Banks & Misc. building penetrations: 5/8" thick stock, custom cut - Cortex Sides and Plugged 5,394.00 Linear Foot
- 019 Install new Azek PVC Trim at Air/Brick Mold with Plugged for cable building penetrations - finished with Cortex Sides and Plugged 1,100.00 Linear Foot
- 020 Install new Azek PVC Trim at Frieze Board Azek PVC 1" x 5" - finished with Cortex Sides and Plugged 1,100.00 Linear Foot
- 021 Install new Azek PVC Trim at Garage Door Face Azek PVC 4" x 6" - finished with Cortex Sides and Plugged 1,100.00 Linear Foot
- 022 Install new Azek PVC Trim at Garage Door Return Azek PVC 1" x 5" - finished with Cortex Sides and Plugged 1,100.00 Linear Foot
- 023 Install new Azek PVC Trim at Garage Door Gasket Azek PVC Gasket - finished with Cortex Sides and Plugged 1,100.00 Linear Foot
- 024 Install new Azek PVC Trim at Window Hooks, Logs, and Sills: 5 1/2" x 4" Azek 1848 - finished with Cortex Sides and Plugged 1,100.00 Linear Foot
- 025 Install new Azek PVC Trim at Base Heads and Legs: 1 1/2" x 4" Azek 1848 - finished with Cortex Sides and Plugged 1,100.00 Linear Foot

[B-2]. VINYL SOFFITS/CEILING & AZEK PVC TRIM (Smooth Finish & white) SPECIFICATION TOTAL \$ 4,938,600.00

Financial Modeling

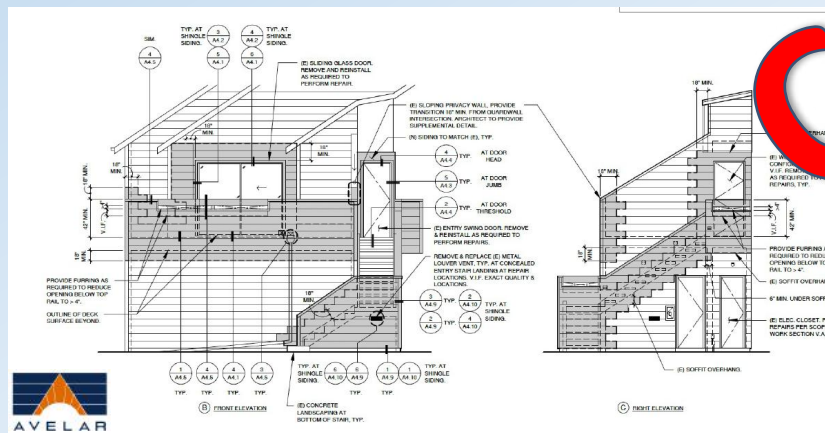
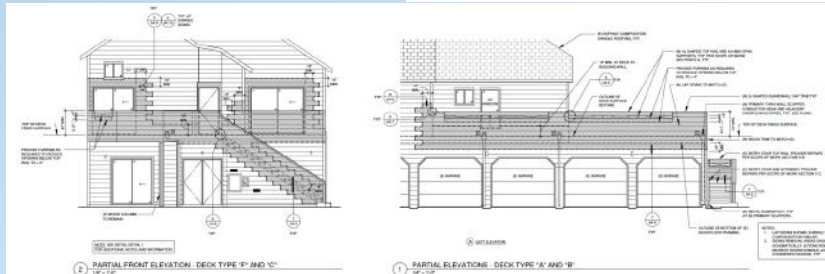
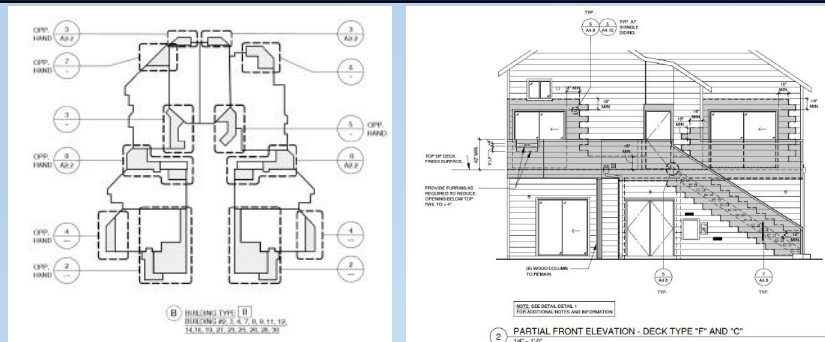
Input Description	Input
1 Current Year	2024
2 Number of Homes	112
3 Average Home Value	\$ 1,000,000
4 Total Condominium Fee Income (collected from owners)	\$ 2,909,622
5 Total Misc Income (collected from other sources)	\$ -
6 Total Revenue (must equal Op Ex line 8) plus Reserve (line 11)	\$ 2,909,622
7 Revenue Reduction	\$ -
8 Operating Expenses	\$ 2,000,000
9 Restoration savings from staging expenses	\$ 100,000
10 Inflation used for property expenses	3%
11 Total Available Cash	\$ 909,622
12 Capital Project Contingency	\$ 700,000
13 Cash Available for Operations	\$ 209,622
14 Average monthly cash flow	\$ 17,468.50
15 Add Comprehensive Projects (see project input page for details)	\$ 45,300,564
16 Total for projects being completed (refrainance)	\$ 45,300,564
17 Per owner Assessment to reduce initial loan	\$ -
18 Per owner Assessment to increase reserve	\$ -
19 Interest Rate for Restoration Loan	3.50%
20 Term for Restoration Loan in years	30
21 Loan draw period (project start to end)	36
22 Reserve Study spend (over 10 years)	\$ 3,861,881
23 Current Reserve Study	\$ 3,861,881
24 Minimum Spend (in current year dollars)	\$ 790,000
25 Average monthly cash flow	\$ 2
26 Smooth condo fee fluctuations (Yes or No)	Yes
27 ADD RESERVATIONS AND MAINTENANCE	\$112,820.00

Market Comparison Checks	Current	Year 5
1 Operating Expenses as a percent of Total Revenue	68.81%	81.74%
2 Reserve Contribution as a percent of Total Revenue	40.23%	N/A
3 Cash and Debt Service as percent of Total Revenue	21.26%	67.80%
4 Annual Condo Fees as a percent of current home value	0.93%	2.03%
5 Restoration cost per home	\$ 145,899	N/A
6 Annual debt service	\$ 1,112,000	\$ 820
7 Average monthly "good" debt service per owner	\$ 92.67	N/A
8 Average annual condo fee over 30 years	\$ 1,781	N/A
9 Average annual project expense in condo fees over 30 year period	\$ 6,524	N/A
10 Average annual reserve balance	\$ 1,467,824	N/A
11 Total community value	\$ 112,000,000	N/A
12 Total capital project expense including debt service over 30 years	\$ 124,463,000	N/A
13 Total capital project expense as a percentage of community value	111%	N/A
14 Average monthly operating expense over 30 years	\$ 2,838,173	N/A
15 Average monthly operating expense per owner over 30 years	\$ 738	N/A
16 Average annual capital project expense	\$ 3,982,369	N/A
17 Average monthly capital project expense per owner over 30 years	\$ 1,001	N/A



Progress Update

DECK BIDS REVIEWED



AVELAR SOW

DECK MATRIX BY STYLE BY BUILDING: DO NOT DELETE ACTUAL

AVELAR SCORE	IV	V	IV	II	II	II	VI	II	VI	III	III	III	III	IV	IV	Total By BU
AVELAR SCORE	Private Deck	Private Deck	Private Deck	Private Deck	Private Deck	Private Deck	Private Deck	Private Deck	Private Deck	Private Deck	Private Deck	Private Deck	Private Deck	Private Deck	Private Deck	
Building - 5	1															
Building - 10	3	1														
Building - 13	1	1														
Building - 15	3	1	1													
Building - 31	1	1														
Building - 3	1															
Building - 3	1															
Building - 4	1															
Building - 7	1															
Building - 8	1															
Building - 9																
Building - 11		3														
Building - 12	2	2														
Building - 14		1														
Building - 16	4															
Building - 19	2	2														
Building - 21																
Building - 23		1														
Building - 25	4	2														
Building - 26		1	1	2												
Building - 28	1															
Building - 30	1	2														
Building - 1																
Building - 4																
Building - 17																
Building - 18																
Building - 20																
Building - 22																
Building - 24																
Building - 27																
Building - 29																
Clubhouse																
Total By Type	28	18	5	9	1	14	6	7	1	2	6	2				113

AVELAR

MISC. BUILDING REPAIRS

FOR BID PURPOSES ONLY

A1.2

Table with multiple columns for item descriptions, quantities, and prices. Includes a large red watermark 'Complete' across the table.

BID RESULTS (113 of 533 locations)

AVELAR BID RESULTS - 5 x Bidders (07/10/2024)

	AC Enterprises	GB Group	IQV	Reconstruction Services	Robert Brown
BASE BID	\$ 3,501,463.00	\$ 3,096,676.01	\$ 3,544,456.00	\$ 5,935,636.41	\$ 4,426,186.00
Permits Fees (3%)	\$ 105,043.89	\$ 92,960.28	\$ 106,333.68	\$ 178,069.09	\$ 144,785.58
Architectural Fees	\$ 208,340.00	\$ 208,340.00	\$ 208,340.00	\$ 208,340.00	\$ 208,340.00
Contingency (30%)	\$ 1,050,438.90	\$ 929,602.80	\$ 1,063,336.80	\$ 1,780,690.92	\$ 1,447,855.80
TOTAL BID	\$ 4,865,285.79	\$ 4,329,579.09	\$ 4,922,466.48	\$ 8,102,736.43	\$ 6,627,167.38

DERIVED REMAINING DECKS (420 of 533)

DERIVED REMAINING DECKS (420 of 533)

	AC Enterprises	GB Group	IQV	Reconstruction Services	Robert Brown
DERIVED BALANCE	\$ 7,404,679.52	\$ 6,009,801.44	\$ 7,526,278.80	\$ 15,937,349.12	\$ 9,956,185.60
Permits Fees (3%)	\$ 222,140.39	\$ 180,234.04	\$ 225,788.36	\$ 478,120.47	\$ 298,685.57
Architectural Fees	\$ 440,584.67	\$ 440,584.67	\$ 440,584.67	\$ 440,584.67	\$ 440,584.67
Contingency (30%)	\$ 2,221,403.86	\$ 1,802,940.43	\$ 2,257,883.64	\$ 4,781,204.74	\$ 2,986,855.68
TOTAL BID	\$ 10,288,808.44	\$ 8,433,620.59	\$ 10,450,535.48	\$ 21,637,259.00	\$ 13,682,311.52

DERIVED ALL DECKS (533 of 533)

533 DECKS AT ONCE (high plus modium/moderate)

	AC Enterprises	GB Group	IQV	Reconstruction Services	Robert Brown
BASE BID	\$ 10,906,142.52	\$ 9,106,477.45	\$ 11,070,734.80	\$ 21,827,985.53	\$ 14,782,371.00
Permits Fees (3%)	\$ 327,184.28	\$ 273,254.32	\$ 332,122.04	\$ 656,189.57	\$ 443,471.15
Architectural Fees	\$ 648,924.67	\$ 648,924.67	\$ 648,924.67	\$ 648,924.67	\$ 648,924.67
Contingency (30%)	\$ 3,271,842.76	\$ 2,732,543.24	\$ 3,321,220.44	\$ 6,501,895.66	\$ 4,434,711.48
TOTAL BID	\$ 15,154,094.23	\$ 12,763,199.69	\$ 15,373,001.96	\$ 29,739,995.43	\$ 20,309,478.90



GOALS

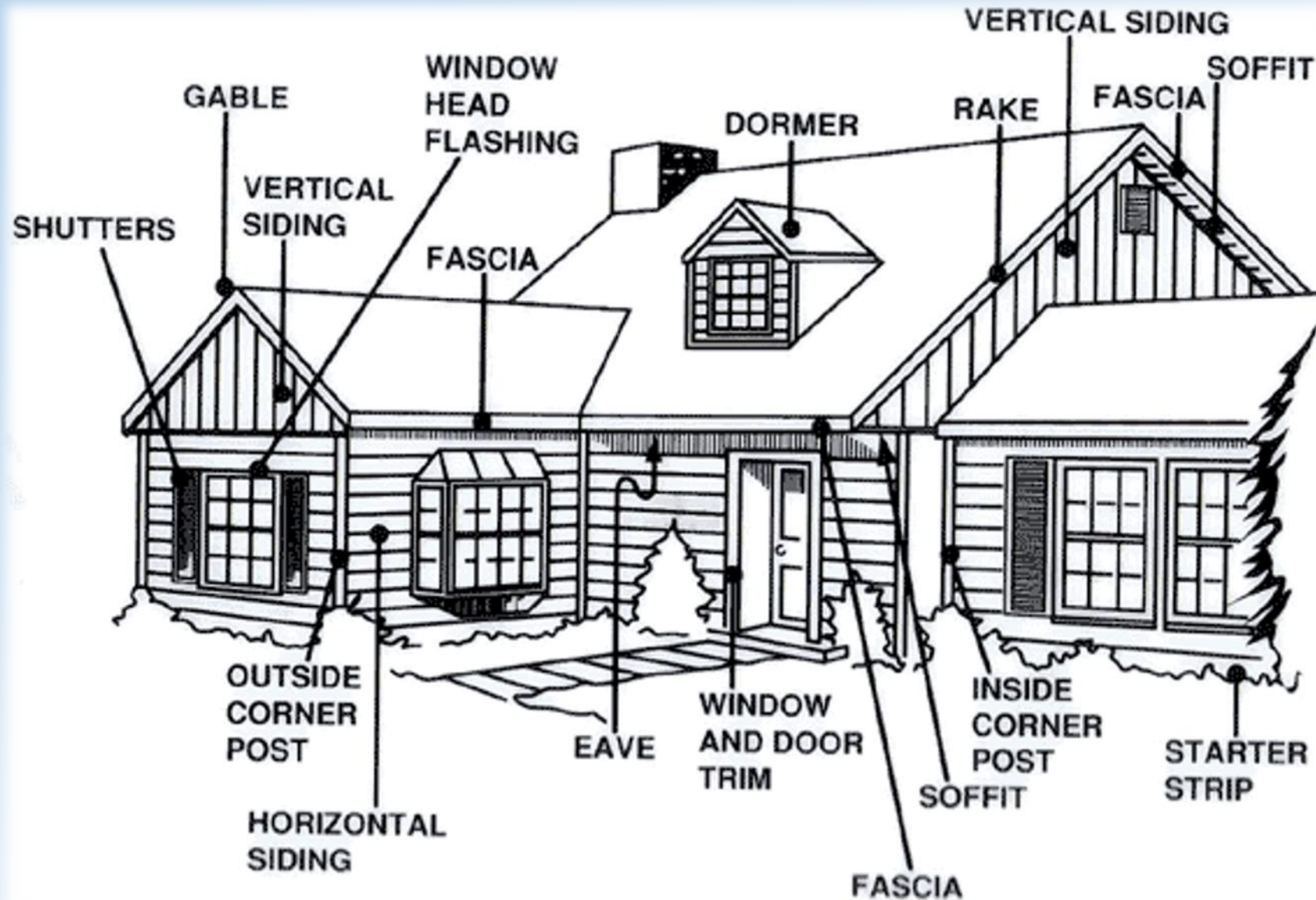
Facilities Advisors:

- Help the board determine the Facts about the exterior of their buildings
- Educate the Board and owners on viable options, considerations & solutions during capital planning for the buildings' exteriors (risks, rewards, value)
- Quantify the amount and replacement cost of the building envelope components at the property
- Provide sound and unbiased advice to the Board and Homeowners at Harbortown
- Deliver an accurate and actionable capital plan resulting in a predictable, responsible and fair per owner per month financial impact over the next 30-years.

Harbortown Board: *(examples below – need Board input and confirmation)*

- Execute our fiduciary responsibility
- Find the highest value and long term solution for maintaining the exterior of our buildings.
- Communicate the facts and options with the community throughout the planning process

Building Envelope Components

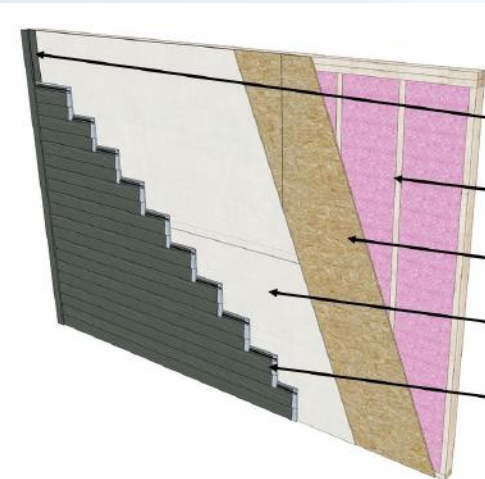
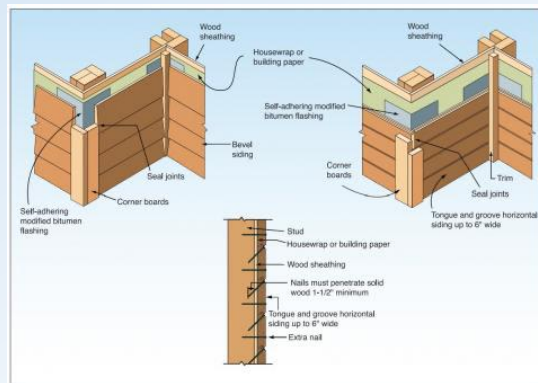
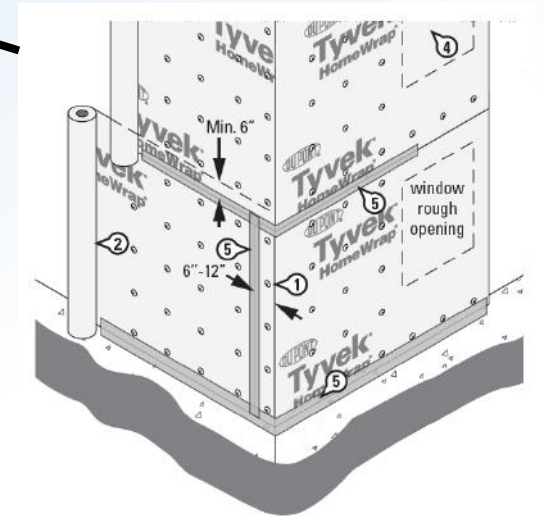
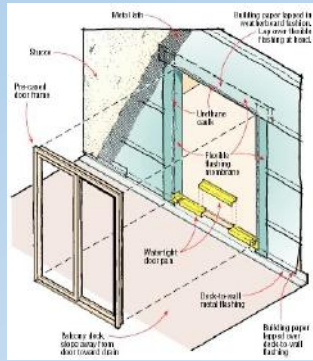
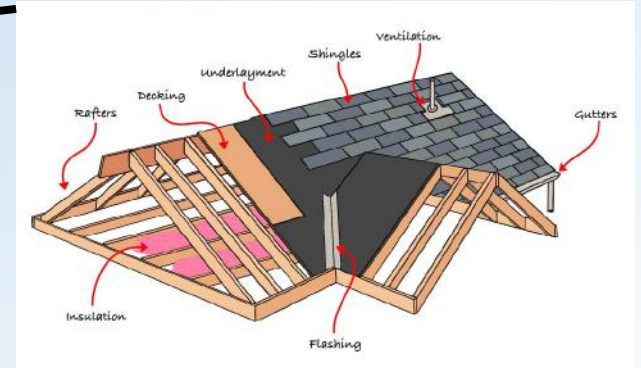
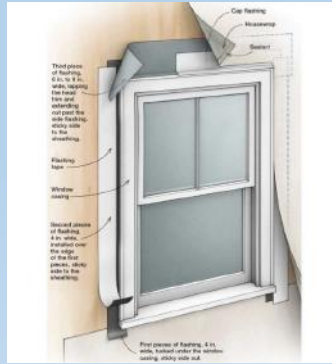
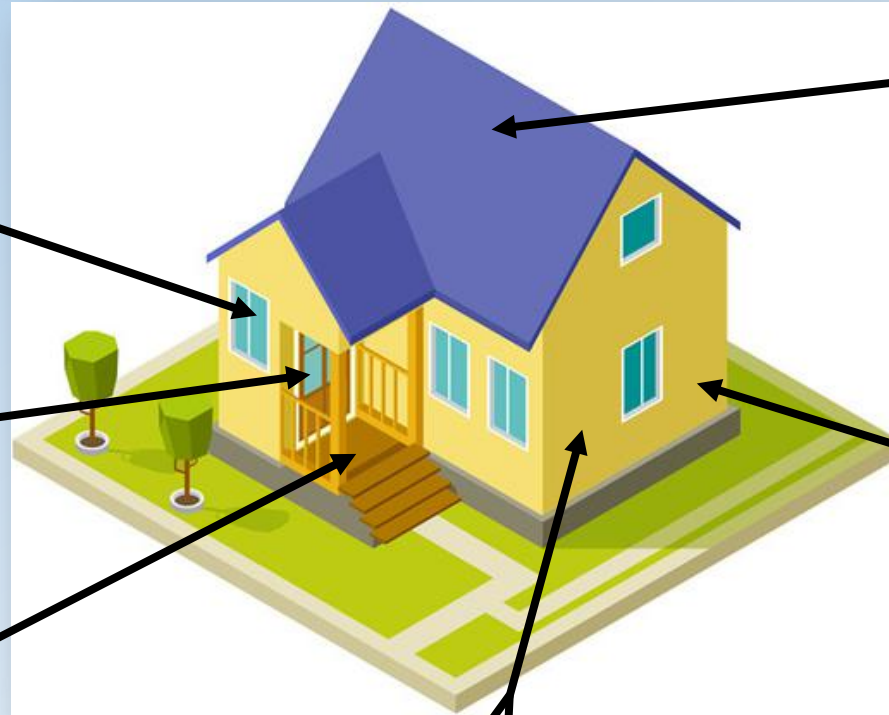


What is a **BUILDING ENVELOPE?**

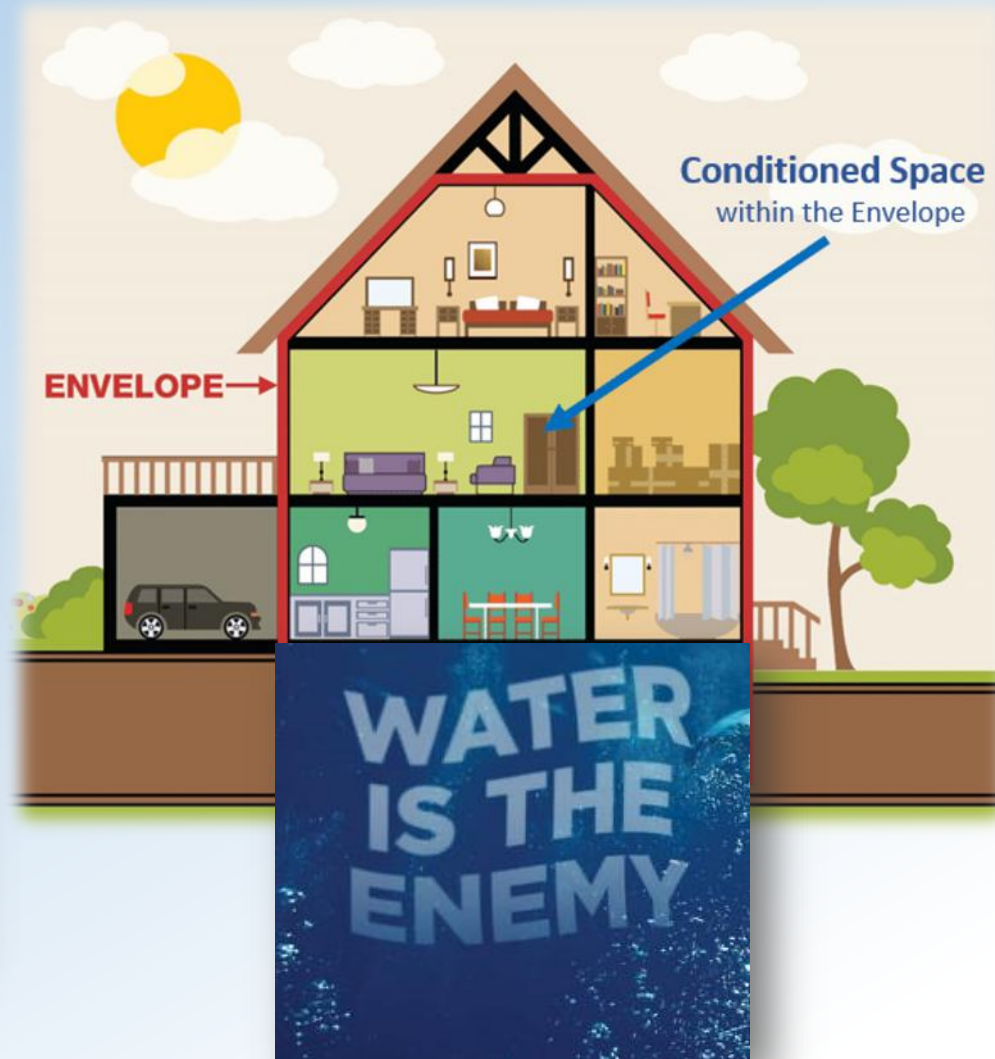


- **What is a building envelope?** *The building envelope includes all the building components that separate the indoors from the outdoors. Building envelopes include the exterior walls, foundations, roof, windows and doors.*
- **What is the purpose of the building envelope?** *The building envelope keeps outside elements, such as moisture and humidity, from entering and causing major damage. Envelope components are designed to prevent water leakage or infiltration to the interior by systems such as: A barrier system which is designed to repel and shed water at the outermost surface.*

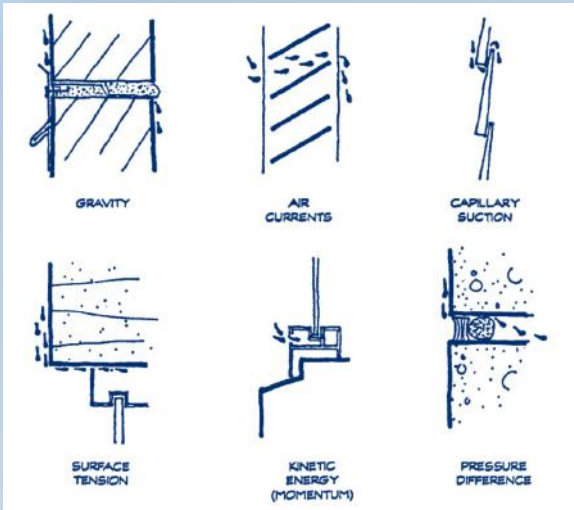
The Building Envelope System



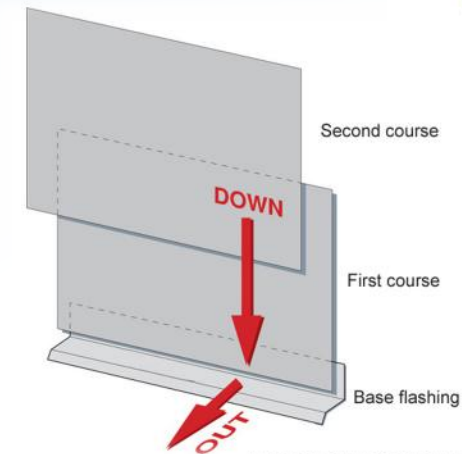
The Building Envelope System



Do we tuck our raincoats in our pants?



Think and act like water.



adapted from Building Science Corporation

WJE Report - SB326

- WJE was engaged to perform inspections as required by California Senate Bill 326 (SB326) and provided their findings in a report dated January 22, 2023



Harbortown Homeowners Association
Manor
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Harbortown Homeowners Association
Manor
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3.6 Other Observations

During the course of the SB326 inspections, general observations were made of the overall buildings. We would like to bring the following observations to your attention because they relate to items that can affect the performance of the EEEs or the safety of owners and residents while using or accessing them.

Throughout the complex the existing siding was seen to be in various states ranging from good to poor condition, with the conditions of trims, fascias, etc. varying similarly. These conditions can lead to water infiltration, both at and away from EEEs. Other needed maintenance was identified include painting to protect metal from corrosion and maintaining of sealants.

Downspouts and scuppers on the decks could be improved to much better control water. This includes downspouts from the roofs that drain water onto second floor decks, and scuppers that have reverse slopes and are not properly flashed and integrated into the building envelope.

We understand that a number of the buildings are supported on deep concrete pier foundations due to the soft soils on the site and that settlement of site soils since construction has been significant. During our inspections, WJE noted that significant settlement appears to have occurred at the base of a number of entry stairs. This has created stair riser heights that are significantly out of building code compliance (Figure 60). While not directly related to structural safety, these dimension changes can make the steps less safe for the residents to use. In addition, there are vertical gaps to the on-grade concrete construction at the bases of the stairs. WJE did not investigate the current structural support as they appeared to be

6.0 EXPECTED FUTURE PERFORMANCE AND REMAINING USEFUL LIFE

Waterproofing Systems

WJE recommendations include replacement or other repair of waterproofing systems in a number of locations. For existing waterproofing systems that remain, our thoughts on future performance follow.

The originally installed exposed waterproofing relies on periodic overcoating for continued function. Continued periodic installation of overcoating by qualified installers should maintain the existing system for the immediate future. The original waterproofing is now in the range of its anticipated life span, so it should be anticipated that at some point in the future full replacement of the waterproofing system will be required. The same is true of the flashing systems.

For the originally installed waterproofing system below the concrete topping slab, the system type and condition is not known so it is difficult to speak to future performance. In a number of instances, the water intrusion has been identified to occur below these waterproofing systems. We recommend that during repair a waterproofing expert review the exposed waterproofing to determine the type and condition and provide information about future performance.



AVELAR - Scope of Work

AIA Document B101® – 2017

Standard Form of Agreement Between Owner and Architect

AGREEMENT made as of the twenty-fifth day of August in the year two thousand twenty-three
(In words, indicate day, month and year.)

BETWEEN the Architect's client identified as the Owner:
(Name, legal status, address and other information)

Harbortown Homeowners Association San Mateo
c/o The Manor Association
1820 Gateway Drive, Suite 100
San Mateo, CA 94404

and the Architect:
(Name, legal status, address and other information)

AVELAR, Inc.
590 Ygnacio Valley Road, Suite 200
Walnut Creek, CA 94596

for the following Project:
(Name, location and detailed description)

Harbortown Homeowners Association San Mateo
Shoreline Drive, Wharfside Road, & Harbor Seal Court
San Mateo, CA 94404
High & Very High Priority Deck & Stair/Landing Repairs Post SB326 Inspection
The Owner and Architect agree as follows.

ARTICLE 1 INITIAL INFORMATION

§ 1.1 This Agreement is based on the Initial Information set forth in this Section 1.1.

Prepare construction documents and provide construction administration services for implementing prioritized architectural & structural deck and stair/landing repairs as identified in the Wiss, Janney, Elstner Associates, Inc. (WJE) report dated March 1, 2023.

UNDERSTANDINGS

- In an effort to facilitate a complete understanding of the issues involved in the reconstruction project, the Owner shall provide all available documents, drawings, maintenance records, reported leaks, etc. to AVELAR for its use.
- This proposal is solely based on relying on the accuracy and completeness of the WJE Report provided to our office. AVELAR has not been retained to verify the accuracy of the report at this time. Should AVELAR discover any obvious discrepancies to the report during the course of providing our services, additional fees may apply to address any additional scope of work items.
- This proposal is based on high and very high priority repairs only as outlined in the WJE Report dated March 1, 2023.
- Construction Documents (Phase 2) and Construction Administration (Phase 4) are subject to adjustment based upon final approval of the Scope of Work identified in Phase 1.

ARTICLE 11 COMPENSATION

§ 11.1 For the Architect's Basic Services described under Article 3, the Owner shall compensate the Architect as follows:

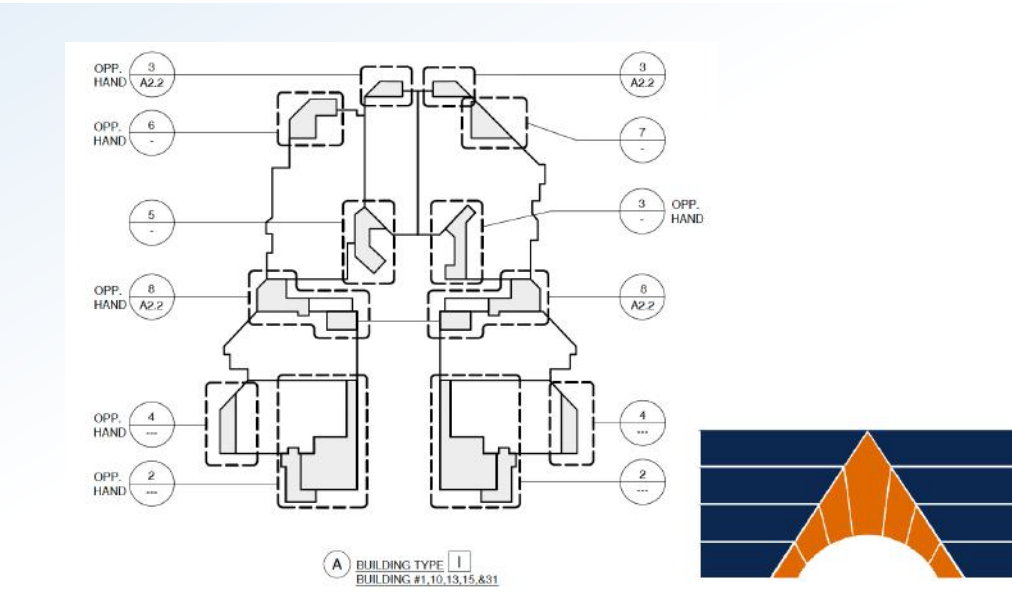
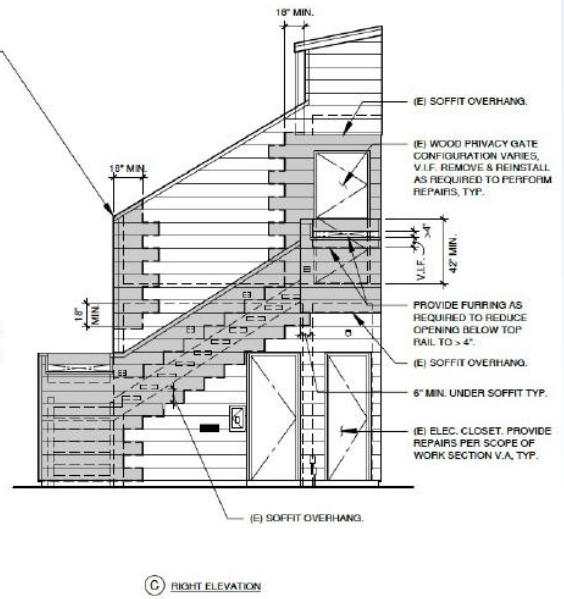
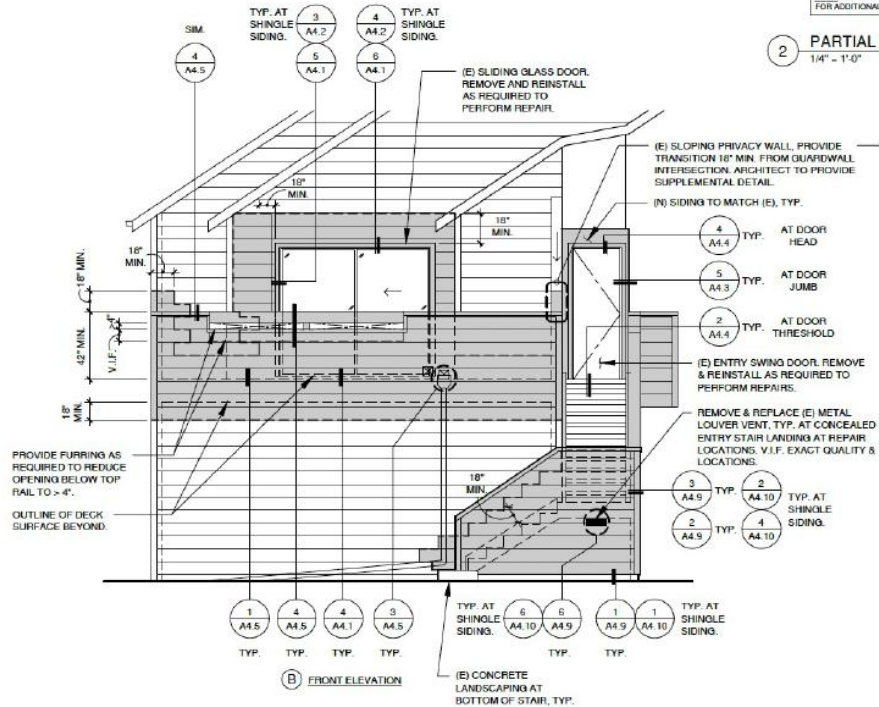
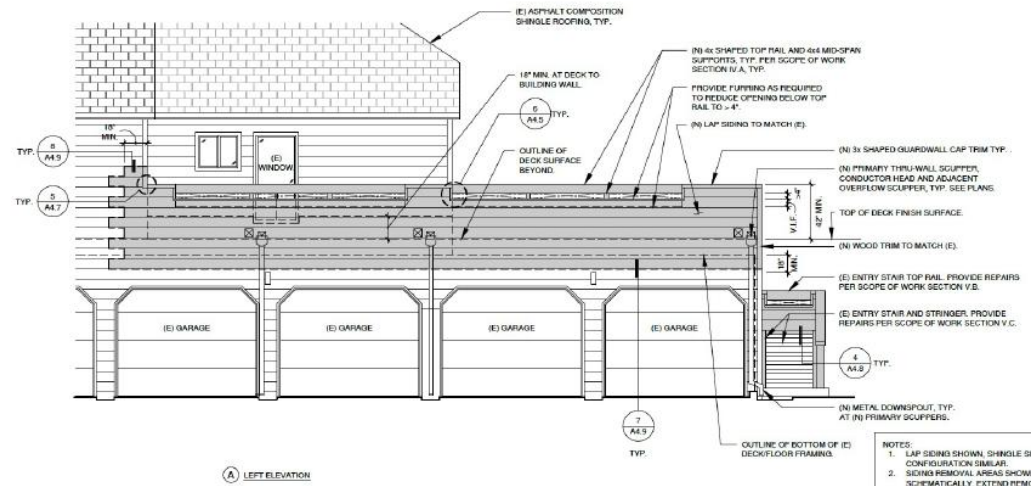
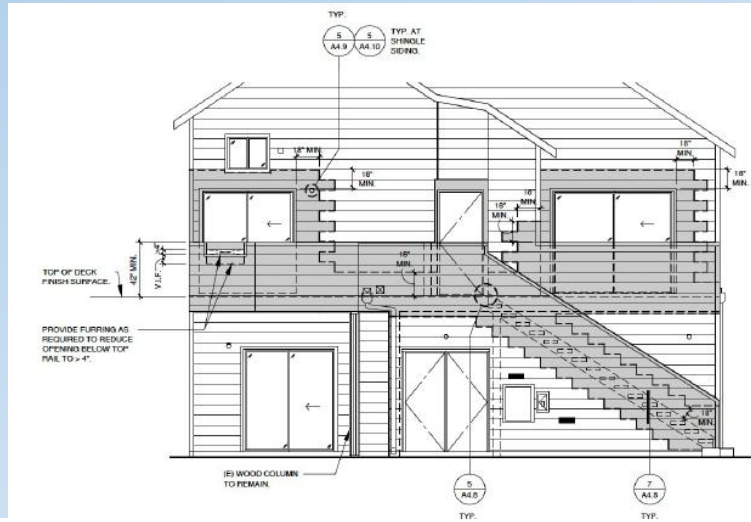
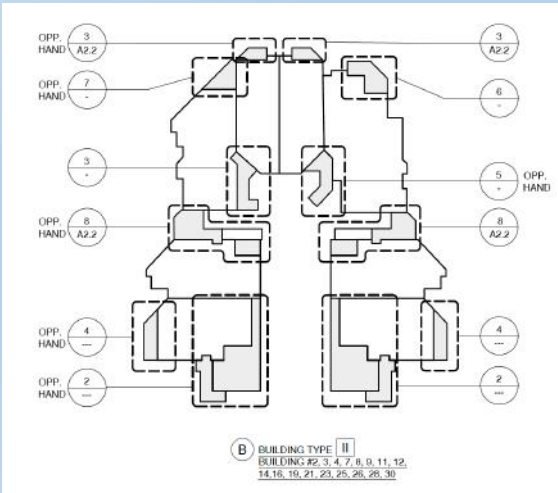
Phase 1 – Project Scoping	\$18,500.00
Phase 2 - Construction Drawings and Specifications	
Documents 50%	\$40,250.00
Documents 100%	\$40,250.00
Phase 3 -Bidding/Negotiations	\$9,500.00
Phase 4- Construction Administration	
Estimate 6-8 hours/week average - \$8,320.00 per month x 10-12 months	\$99,840.00
Total Fee for Architectural Services	\$208,340.00

Preliminary Reconstruction Schedule:

- Finalize & Execute Owner/Architect AIA B101 Agreement..... 08/25/23
- Begin Project Scoping..... 08/03/23
- Begin Construction Drawings and Specifications 08/21/23
- Complete Construction Drawings and Specifications10/05/23
- Issue Construction Documents for Bidding.....10/06/23
- Construction drawings submitted to Building Department for permits..... 10/09/23
- Receive General Contractor Bids.....11/10/23
- General Contractor Selected.....11/27/23
- HOA/General Contractor's Agreement Executed.....12/08/23
- Building Permits issued12/11/23
(Contingent on local jurisdiction's schedule & response)
- Construction begins (Estimated term of construction 10-12 months)..... 01/02/24
- Construction completed January 2025



DECK BIDS (Avelar Bid Details)

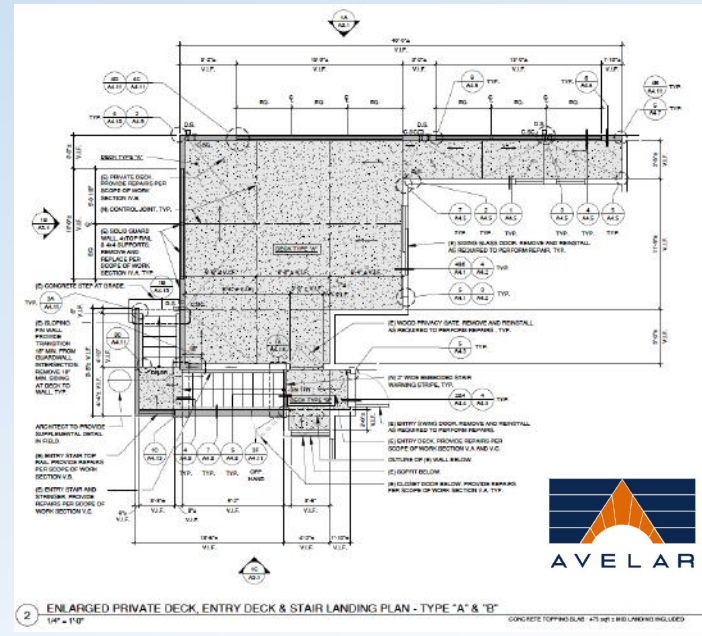
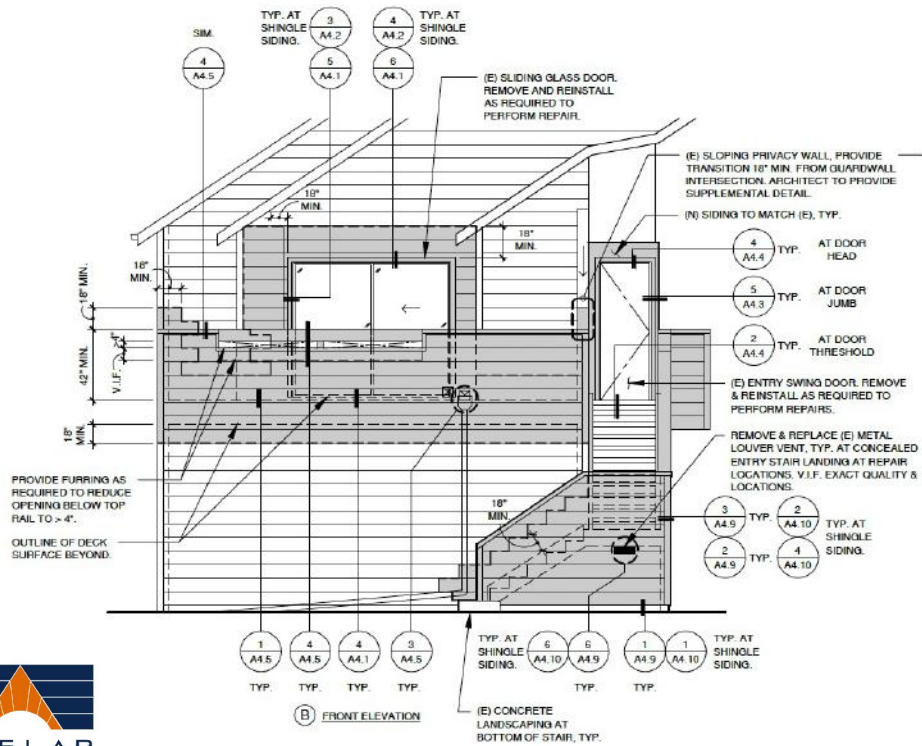


DECK BIDS

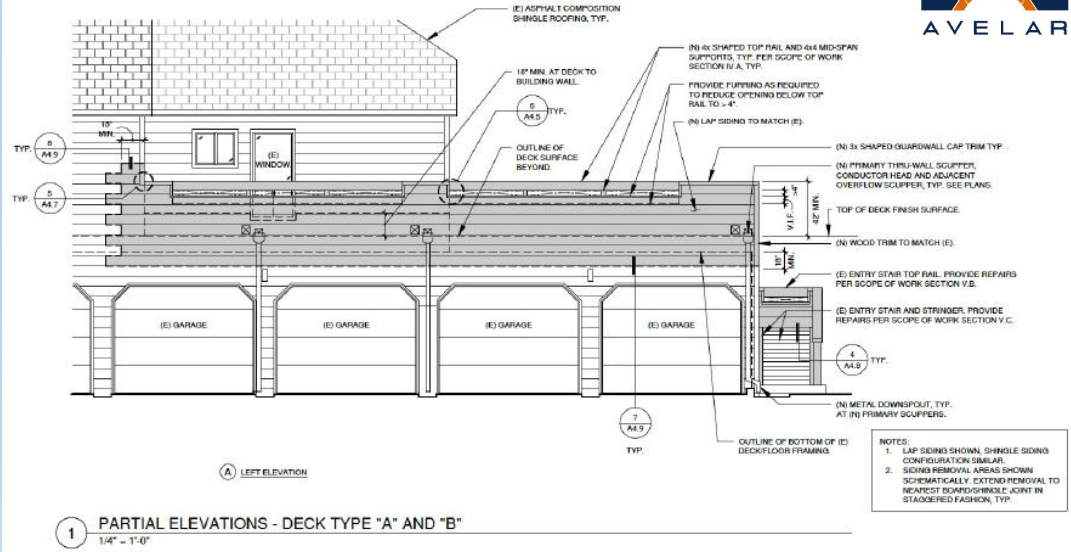
420 of 533 not in current Scope

	IV	V	IV	II	II	II	VI	II	VI	III	III	III	III	IV	IV	
100% COUNT	DECK MATRIX BY STYLE BY BUILDING: DO NOT DELETE ACTUAL															
	A - Private Deck	B - Landings	C - Private Deck	D - Private Deck	E - Private Deck	F - Entry Deck	G - Entry Deck	H - Private Deck	I - Entry Deck & Stair	L - Private Deck	K-3 - Private Deck	K1 - Private Deck	K2 - Private Deck	M - Private Deck	N - Private Deck	Total By BLDG
Building - 5	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 10	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 13	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 15	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 31	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 2	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 3	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 4	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 7	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 8	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 9	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 11	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 12	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 14	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 16	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 19	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 21	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 23	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 25	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 26	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 28	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 30	2	2	2	2	2	2	2	2	2	2	-	-	-	-	-	20
Building - 1	0	0	0	0	0	0	0	0	0	0	2	3	2	5	2	14
Building - 6	0	0	0	0	0	0	0	0	0	0	2	2	1	4	1	10
Building - 17	0	0	0	0	0	0	0	0	0	0	4	1	0	5	0	10
Building - 18	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	8
Building - 20	0	0	0	0	0	0	0	0	0	0	4	0	0	4	0	8
Building - 22	0	0	0	0	0	0	0	0	0	0	4	0	0	4	0	8
Building - 24	0	0	0	0	0	0	0	0	0	0	0	3	1	3	1	8
Building - 27	0	0	0	0	0	0	0	0	0	0	0	4	3	4	3	14
Building - 29	0	0	0	0	0	0	0	0	0	0	0	4	3	3	3	13
CLUBHOUSE	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total By Type	44	44	44	44	44	44	44	44	44	44	16	19	12	34	12	533

SCOPE OF WORK



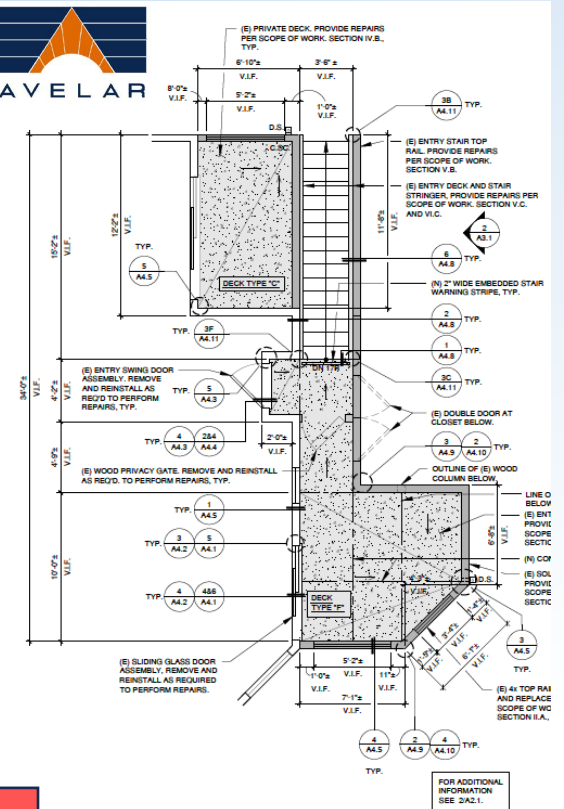
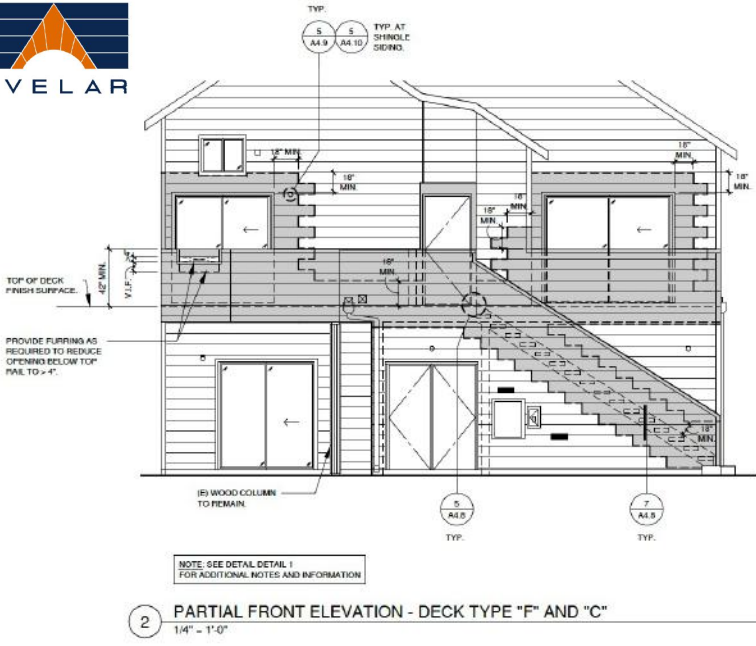
SCOPE OF WORK



Not included in
SCOPE of WORK



SCOPE OF WORK



Not included in SCOPE of WORK



SCOPE OF WORK



Not included in
SCOPE of WORK

BID RESULTS (113 of 533 locations)



AVELAR BID RESULTS - 5 x Bidders (07/10/2024)

	AC Enterprises	GB Group	IQV	Reconstruction Services	Robert Brown
BASE BID	\$ 3,501,463.00	\$ 3,098,676.01	\$ 3,544,456.00	\$ 5,935,636.41	\$ 4,826,186.00
Permits Fees (3%)	\$ 105,043.89	\$ 92,960.28	\$ 106,333.68	\$ 178,069.09	\$ 144,785.58
Architectural Fees	\$ 208,340.00	\$ 208,340.00	\$ 208,340.00	\$ 208,340.00	\$ 208,340.00
Contingency (30%)	\$ 1,050,438.90	\$ 929,602.80	\$ 1,063,336.80	\$ 1,780,690.92	\$ 1,447,855.80
TOTAL BID	\$ 4,865,285.79	\$ 4,329,579.09	\$ 4,922,466.48	\$ 8,102,736.43	\$ 6,627,167.38

HIGH PRIORITY DECKS



AVERAGE BID RESULTS – 113 Decks

(reserve planning)

BID ITEM	AVERAGE (weighted)
<i>Section I</i>	\$ 75,738.91
<i>Section II</i>	\$ 263,040.91
<i>Section III</i>	\$ 281,723.10
<i>Section IV</i>	\$ 1,835,762.76
<i>Section V</i>	\$ 473,591.37
<i>Section VI</i>	\$ 399,699.55
<i>Section VII</i>	\$ 437,526.76
BASE BID TOTAL	\$ 3,767,083.37
<i>Permit Fee (3%)</i>	\$ 113,012.50
<i>Architectural Fees</i>	\$ 208,340.00
<i>Contingency (30%)</i>	\$ 1,130,125.01
Overall Reconstruction Cost Total	\$ 5,218,560.88

HIGH PRIORITY DECKS



DERIVED REMAINING DECKS (420 of 533)

	DERIVED REMAINING DECKS (420 of 533)				
	AC Enterprises	GB Group	IQV	Reconstruction Services	Robert Brown
DERIVED BALANCE	\$ 7,404,679.52	\$ 6,009,801.44	\$ 7,526,278.80	\$ 15,937,349.12	\$ 9,956,185.60
Permits Fees (3%)	\$ 222,140.39	\$ 180,294.04	\$ 225,788.36	\$ 478,120.47	\$ 298,685.57
Architectural Fees	\$ 440,584.67	\$ 440,584.67	\$ 440,584.67	\$ 440,584.67	\$ 440,584.67
Contingency (30%)	\$ 2,221,403.86	\$ 1,802,940.43	\$ 2,257,883.64	\$ 4,781,204.74	\$ 2,986,855.68
TOTAL BID	\$ 10,288,808.44	\$ 8,433,620.59	\$ 10,450,535.48	\$ 21,637,259.00	\$ 13,682,311.52

**MEDIUM / MODERATE PRIORITY
DECKS**

UPDATES TO THE RESERVE STUDY

2 x Projects

current bids for high priority deck work

=

a special assessment of **\$6,146,698**

medium & moderate deck work

=

a special assessment of **\$7,916,597**

DERIVED ALL DECKS (533 of 533)

	533 DECKS AT ONCE <i>(high plus modium/moderate)</i>				
	AC Enterprises	GB Group	IQV	Reconstruction Services	Robert Brown
BASE BID	\$ 10,906,142.52	\$ 9,108,477.45	\$ 11,070,734.80	\$ 21,872,985.53	\$ 14,782,371.60
Permits Fees (3%)	\$ 327,184.28	\$ 273,254.32	\$ 332,122.04	\$ 656,189.57	\$ 443,471.15
Architectural Fees	\$ 648,924.67	\$ 648,924.67	\$ 648,924.67	\$ 648,924.67	\$ 648,924.67
Contingency (30%)	\$ 3,271,842.76	\$ 2,732,543.24	\$ 3,321,220.44	\$ 6,561,895.66	\$ 4,434,711.48
TOTAL BID	\$ 15,154,094.23	\$ 12,763,199.69	\$ 15,373,001.96	\$ 29,739,995.43	\$ 20,309,478.90

COMBINED ALL DECKS

UPDATES TO THE RESERVE STUDY **1 x Project**

High & Medium priority deck work combined

=

a special assessment of **\$14,063,295**

Other Planning Considerations & Liabilities

- I. Fencing
- II. Potential Settling Issues
- III. Potential Plumbing Repairs
- IV. Potential Lagoon unknowns

AVG FINANCIAL IMPACT – per owner per month

YEAR	OPTION 1 <i>(High Priority 1st – phased over 8 years)</i>	OPTION 2 <i>(Complete over 3-years)</i>			
FY 2024					
FY 2025					
FY 2026					
FY 2027					
FY 2028					
FY 2029					
FY 2030					
FY2031					
FY 2032					
FY 2033					
FY 2034					

EXAMPLE LAYOUT –
Financial impact
per owner per month



NEXT STEPS

- **BOARD DECISIONS:**

1) Proceed with Avelar's Bid Scope (high priority, 113 deck locations)

YES

NO

2) Adjust scope with Avelar (entire buildings or entire elevations) and re-bid revised scope of work.

YES

NO

3) Adjust scope with Avelar and re-bid to include all 533 locations

YES

NO

4) Conduct an Invasive Building Envelope Evaluation on the components outside of the WJE Investigation and Report

YES

NO

Reasoning for Recommendation

RECOMMENDATION: *Conduct an Invasive Building Envelope Evaluation on the components outside of the WJE Investigation and Report*

- The buildings are 45 years old, and their envelope is coming to the end of their life cycle;
- An invasive evaluation will provide a clear picture to the Board of the overall condition of the buildings and allow insight into the actual overall building's life cycle; and
- This will provide a clearer financial picture of the options from a selection of Repair > High Priority Decks > Include High to Medium Decks > Replace entire fascia sides if repairs are needed or > Replace all building envelopes.

NEXT STEPS IF THE BOARD DECISION IS **“PROCEED WITH DECK REPAIRS NOW”**

1. A discussion and decision on funding the work
2. Further discussions and clarifications with Avelar (see *“Questions for Avelar” slide included*)
3. Avelar to get further clarification from bidders and conduct interviews with bidders (see *“Questions for Bidders” slide included*)
4. Updating the community on decisions and the plan

Questions for Avelar

1. What is the expected life of the bid scope of work?
2. How soon should we expect to have to do the same or similar repairs/replacement on the remaining deck locations at the property?
3. Are there building envelope elements or components outside of the defined scope of work that could impact the performance or useful life of the scope or work? (ie this scope of work fails due because of a problem beyond the area/scope of the project)
4. Our buildings are 44+ years old. After your visits to the property and review of the WJE report, how much life do you think is left on the building envelope components outside of the scope of this bid? Do you believe we will face a major building envelope project in our near future? Should we consider further investigation of our building envelope prior to proceeding with this deck project?
5. Do you believe these 5 x bids are “apples to apples?”
6. Have you confirmed the accuracy of the bid with each bidder, based on the large differences in the line item results?
7. What sort of Schedule of Values would you use to manage the progress of the work to ensure the progress payments are fair and equitable to all parties?
8. How do you propose to accurately manage the large contingency? Will you be able to confirm quantities carried in the base bid (What we are buying by accepting the base bid) so the use of contingencies can be accurately accounted?
9. See the comments in the PDF files attached – what are Avelar’s thoughts on each?
10. Based on what you have seen visually at the property and the age of the buildings, do you believe this scope of work is the best or should a more comprehensive and holistic approach be considered by the Board?

Questions for Bidders (page 1 of 2)

1. Confirm bidders attended the Prebid and made site visits to the property.
2. After visiting the site do you believe our 44+ year old buildings have other major building envelope projects coming in the near term? Do you believe this scope of work considers and sets us up to limit re-working the new work with future building envelope work adjacent to the area or work? Do you have any recommendations for expanding or adjusting the current scope of work? Do you believe alternate new siding and trim products should be considered with this scope of work? What are your thoughts on expanding the scope to include complete elevations at the specific locations (i.e.. corner to corner, foundation to eve). Is it more cost effective to replace siding and trim on an elevation approach versus and spot replacement and integration approach?
3. The bid results are wide ranging. Would you be able to further breakdown your bid or provide a proposed schedule of values by building, scope section, and/or deck type?
4. With such a large contingency (30% of base bid), can the bidders confirm the specific quantities and details carried in the Base Bid numbers by each contractor for items such as quantity of plywood, quantity of siding, etc.... Shouldn't we as the owner, know for sure what we are buying with the base bid so we can clearly understand what is extra/covered in the contingency?
5. Can bidders describe how they would manage "contract modifications" or "change orders?" Examples of the identification, approval, documenting, reporting process.
6. How do bidders propose to communicate & coordinate with individual owners throughout the project?
7. Will workers be all over the sight at different locations at once or will work be localized to specific buildings and areas? What measures will be taken to manage the site and minimize the disturbance to owners?
8. Once you start at a building will you complete all the work at a building or come back and forth throughout the project duration?

Questions for Bidders (page 2 of 2)

9. **SECTION I** – please explain what you carried here or carried throughout the bid in other sections? Why did you not breakout this section as requested in the bid?
10. **SECTION II** - how many locations do you believe are specified to be done here (FYI – our count is 10)? *If their count is different have them explain how and what they counted.*
11. **SECTION III** – how many locations do you believe are specified to be done here (FYI – our count is 16)? *If their count is different have them explain how and what they counted.* Please explain your approach to bidding this section – there is a 300k+ swing between the 3 closest bids for this section which is a difference of +/- \$19,000 difference per location (this is significant)
12. **SECTION IV** - how many locations do you believe are specified to be done here (FYI – our count is 39)? *If their count is different have them explain how and what they counted.*
13. **SECTION V** - how many locations do you believe are specified to be done here (FYI – our count is 18)? *If their count is different have them explain how and what they counted.*
14. **SECTION VI** – There are significant differences. How many locations do you believe are specified to be done here (FYI – our count is 21)? *If their count is different have them explain how and what they counted.* Please explain your approach to bidding this section – there is a 200+ swing between the 3 closest bids for this section which is a difference of +/- \$10,000 difference per location (this is significant)
15. **SECTION VII** – Did bidders carry painting in each section (II – VI) as instructed in the bid documents? How is there a difference of 150k between the 3 closest bidders for this section?
16. **UNIT BID PRICING** – can you explain how you priced item B – plywood deck sheathing? Can you explain how you priced items F – lap siding and cedar shingles? What is included with each?
17. **UNIT BID PRICING - Gutters** – confirm what material bidders carried for gutters and downspouts. Bid documents specify “galvanized steel”, primed, painted and sealed.