

MASTER ENABLING AGREEMENT *Rev. 2022-0104*

For use on any CSU project

SERVICE PROVIDER
 TRUSTEES

This AGREEMENT is made and entered into this 1st day of January, 2025 pursuant to the Public Contract Code 10700, et seq., by and between the Trustees of the California State University on behalf of

<i>Campus, hereafter referred to as Trustees, and</i> California State University, Office of the Chancellor	Amendment No.: N/A	Agreement No.: 24-854	Is agreement for Design Professional services: Yes (GP-8b)	Project No.: MRB00
<i>Service Provider, hereafter referred to as Service Provider.</i> IDeAs Consulting, Inc.	CSU Vendor ID No.: 1009101518	License Number: E-20938		DIR No.: N/A

WITNESSETH: That the Service Provider in consideration of the statements and conditions herein contained, agrees to furnish labor, materials, and equipment and to perform work necessary to complete, in a skillful manner the following: Provide mechanical and electrical peer review for public works for the California State University systemwide.

The Service Provider shall provide such services as more fully described in the following Rider and Exhibits, which by this reference are incorporated herein and made part of this Agreement:

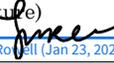
Rider	A	Agreement General Provisions,	consisting of six (6) pages;
Exhibit	A	Scope of Work	consisting of four (4) pages;
Exhibit	B	Service Order Authorization to Proceed Sample,	consisting of one (1) page;
Exhibit	C	Service Provider Rate Schedule,	consisting of one (1) page.

The term shall begin upon receipt of an executed Agreement from the Trustees and shall end as of June 30, 2026, with the option given the Trustees of extending the Agreement with the same terms and conditions for two (2) additional, two (2) year periods. Work elements started during the term shall continue to their completion and acceptance by the Trustees.

Campuses and the administrative office shall execute a Service Order and Authorization to Proceed to secure Service Provider's services under this Agreement

Service Provider shall report to: California State University, Rachel Patterson, University Engineer (562) 951-4017.

The basic services amount to be expended under this Agreement shall be determined by the overall usage of each participation campus and the administrative office of the California State University. Payment shall be made in accordance with Rider A, Exhibits A, Exhibit B, and Exhibit C.

Trustees of the California State University							Service Provider						
Campus California State University, Office of the Chancellor							Firm Name IDeAs Consulting, Inc.						
By (Trustees' Authorized Signature)  <small>Lindsey Rowell (Jan 23, 2025 17:50 PST)</small>							By (Authorized Signature) 						
Printed Name and Title of Person Signing Lindsey Rowell, Chief of Energy, Sustainability and Transportation							Printed Name and Title of Person Signing David Kaneda, Principal and Thought Leader						
Address of Campus Project Administrator 401 Golden Shore; Long Beach, CA 90802							Address of Service Provider 21350 Vai Avenue; Cupertino, CA 95014						
SCO Acct	Fund	Sub Fund	Agency	Yr.	Ref/Item	Category	Program	Element	Component	Chapter	Fiscal Yr.	Legal Ref.	
N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Fund Name			PS Account		PS Fund	PS Dept. ID	PS Program	PS Class	PS Project/Grant				
N/A			N/A		N/A	N/A	N/A	N/A	N/A				
Amount Encumbered		<i>I hereby certify upon my personal knowledge that budgeted funds are available for the period and purpose of the expenditures stated above.</i>											
\$0.00													
Amount of Increase		Signature of Accounting Officer							Date				
\$0.00		N/A \$0 MEA											
Amount of Decrease		<i>I hereby certify that I have examined the written Agreement and find the same to be in accordance with the requirements of California State University Contract Law. G. ANDREW JONES, General Counsel</i>											
\$0.00													
Total Amount Encumbered		By Attorney							Date				
\$0.00		 <small>Andy Maiorano (Jan 24, 2025 15:40 PST)</small>							01/24/2025				

This Agreement may be executed in counterparts all of which taken together shall constitute one and the same Agreement. The exchange of copies of this Agreement by electronic mail in "portable document format" ("PDF") form or by other similar electronic means shall constitute effective execution and delivery of this Agreement and shall have the same effect as copies executed and delivered with original signatures.

Rider A - Agreement General Provisions, Service Provider

1. Service Provider Relationship. The Service Provider, in the performance of this Agreement, is an independent contractor and is not an employee, agent, or officer of the Trustees.
2. Payments. Payments under this Agreement shall be made in arrears of work increment completed to the satisfaction of the Trustees and upon submission of an invoice in CSU invoice format. If not otherwise specified payments for services rendered will be processed monthly upon presentation of invoice.
3. Services. Trustees may issue a written order with respect to the services to be performed under this Agreement at any time before the completion of the services. Trustees shall pay Service Provider an amount for such services as provided in this Agreement, or if not so provided, Trustees shall pay Service Provider a reasonable amount, which shall be agreed upon by the parties.
4. Service Provider shall not utilize any information, not a matter of public record, which is received by reason of this Agreement, for pecuniary gain not contemplated by the terms of this Agreement, regardless of whether Service Provider is or is not under contract at the time such gain is realized (Education Code Section 89006).
5. Ownership. The report, survey, or other product developed by Service Provider pursuant to this Agreement is the property of Trustees and shall not be disseminated to others by Service Provider unless authorized by Trustees.
6. Termination for Convenience. Trustees may terminate this Agreement upon a three (3) business-day advance written notice to Service Provider. In the event of such termination, the Service Provider shall be paid only for the work satisfactorily completed.
7. Termination for Cause. Trustees may terminate this Agreement for cause should Service Provider fail to perform as herein provided. In the event of such termination, Trustees shall be relieved of the obligation to make any payment to the Service Provider and Trustees may proceed by other means with the work in any manner the Trustees deem proper.
8. Indemnification.
The Indemnification subsection below, next to the checked box, applies to this agreement, while the subsection next to the unchecked box does not apply to this agreement.
 - a. Provisions of item 8a shall apply if the agreement is with a Service Provider that does **not** qualify under the provisions of California Civil Code section 2782.8. The Service Provider agrees to hold harmless, defend, and indemnify the State of California, the Trustees of the California State University, the University, and the officers, employees representatives, and agents of each of them from any and all claims, damages, losses, causes of action and demands, and all costs and expenses incurred in connection therewith, including, but not limited to, attorneys' fees and costs resulting from or in any manner arising out of or in connection with any negligent act or omission or willful misconduct on the part of the Service Provider, its officers, agents, and employees, in the performance of this Agreement. This provision shall survive the expiration or termination of this Agreement.
 - b. Provisions of item 8b shall apply if the agreement is with a Service Provider that does qualify under the provisions of California Civil Code section 2782.8 and the scope of work is for design professional services. The Service Provider agrees to hold harmless, defend, and indemnify the State of California, the Trustees of the California State University, the University, and the officers, employees

representatives, and agents of each of them from any and all claims, damages, losses, causes of action and demands, and all costs and expenses incurred in connection therewith, including, but not limited to, attorneys' fees and costs to the extent arising out of, pertaining to, or relating to the negligence, recklessness, or willful misconduct on the part of the Service Provider, its officers, agents, and employees, in the performance of this Agreement. In no event shall the cost to defend charged to the Service Provider exceed the Service Provider's proportionate percentage of fault. However, notwithstanding the previous sentence, in the event one or more defendants is unable to pay its share of defense costs due to bankruptcy or dissolution of the business, the Service Provider shall meet and confer with other parties regarding unpaid defense costs. Service Provider's liability is not limited to recoverable insurance. This provision shall survive the expiration or termination of this Agreement.

The provisions of section 8b pertaining to the duty and cost to defend shall not apply to either of the following:

- 1) Any contract for design professional services per the provisions of California Civil Code section 2782.8, or amendment thereto, where a project-specific general liability policy insures all project participants for general liability exposures on a primary basis and also covers all design professionals for their legal liability arising out of their professional services on a primary basis.
 - 2) A design professional per the provisions of California Civil Code Section 2782.8, that provides design professional service and is party to a written design-build joint venture agreement and not the primary holder of the Trustees and Design-Builder contract.
9. Insurance Provisions. The Service Provider shall not commence work until the Trustees have received evidence of the insurance required in this section and approved it.
- a. Service Provider shall obtain the following policies and coverage. The insurance furnished by the Service Provider under this section shall provide coverage in amounts not less than the following, unless a different amount is stated in Exhibit A, Scope of Work Description:
 - 1) Comprehensive or Commercial Form General Liability Insurance:
On an occurrence basis, cover work done or to be done by or on behalf of the Service Provider and shall provide insurance coverage for bodily injury, personal injury, property damage, and contractual liability. The aggregate limit shall apply separately to the work. Limits of Liability:
\$2,000,000 General Aggregate
\$1,000,000 Each Claim - combined single limit for bodily injury and property damage.
 - 2) Business Automobile Liability Insurance:
On an occurrence basis, cover owned, scheduled, hired, and non-owned automobiles used by or on behalf of the Service Provider and shall provide insurance coverage for bodily injury, property damage, and contractual liability. Use Insurance Service Office (ISO) Form Number CA 0001 covering any automobile. Limits of Liability:
\$1,000,000 Each Accident - combined single limit for bodily injury and property damage.
 - 3) Workers' Compensation Insurance:
This insurance shall include Employers Liability limits of \$1,000,000 and other limits required under California law.
 - 4) Professional Liability Insurance:
Professional liability (errors and omissions) insurance on an occurrence basis is preferred,

covering work done or to be done by or on behalf of the Service Provider and providing insurance for professional liability in the amount of \$1,000,000 each occurrence. The Service Provider shall obtain and maintain professional liability insurance on a claims-made basis for no less than \$1,000,000 each claim and

\$2,000,000 annual aggregate, and certification of coverage shall be submitted to the Trustees upon signing of this Agreement. If the total contract amount exceeds \$1,000,000 the Service Provider shall renew and keep such insurance in effect for at least ten (10) years after the recordation of the notice of completion.

For any of the insurance described in the paragraphs above, the amount of limits can be satisfied by a combination of primary and excess or umbrella insurance.

- b. Insurers shall be authorized in the State of California to transact insurance and shall hold a current A.M. Best's rating of no less than **A: VII** or alternatively a carrier acceptable to the Trustees.

Verification of coverage shall be provided as follows:

- 1) The Service Provider shall submit to the Trustees copies of certificates of insurance and endorsements to the policies of insurance required by the Agreement as evidence of the insurance coverage.
 - 2) The scope of coverage shall be shown on the certificate of insurance.
 - 3) The Service Provider shall provide written notice of cancellation of coverage within thirty (30) days to the Trustees.
 - 4) The Service Provider shall notify the Trustees in writing of any material change in insurance coverage.
 - 5) Renewal certifications shall be timely filed by the Service Provider for coverage until the work is accepted as complete.
 - 6) Trustees reserve the right to require complete, certified copies of all required insurance policies, including endorsements required by these provisions, at any time.
- c. Insurance policies except for Workers Compensation and Professional Liability insurance shall contain, or be endorsed to contain, the following provisions:
- 1) For the general policies, the State of California, the Trustees of the California State University, the University, their officers, employees, representatives, volunteers, and agents shall be covered as additional insureds.
 - 2) For claims related to the work, the Service Provider's insurance coverage shall be primary insurance as respects the State of California, the Trustees of the California State University, the University, their officers, employees, representatives, volunteers, and agents. Insurance or self-insurance maintained by the State of California, the Trustees of the California State University, the University, their officers, employees, representatives, volunteers, and agents shall be in excess of the Service Provider's insurance and shall not contribute with it.
 - 3) The State of California, the Trustees of the California State University, the University, their officers, employees, representatives, volunteers, and agents shall not by reason of their inclusion as additional insureds incur liability to the insurance carriers for payment of premiums for such insurance.

- d. Additional Insurance Provisions

- 1) Any deductible under any policy of insurance required in this section shall be the Service Provider's liability.
 - 2) Acceptance of certificates of insurance by the Trustees shall not limit the Service Provider's liability under the Agreement.
 - 3) The Service Provider's obligations to obtain and maintain required insurance are non-delegable duties under this Agreement.
10. Personal Eligibility Certification. If the Service Provider is a natural person, the Service Provider certifies by signing this Agreement that s/he is a citizen or national of the United States or otherwise qualified to receive public benefits under the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (P.L. 104-193; 110 STAT. 2105, 2268-69), State of California Governor's Executive Order W-135-96.
11. Corporate Eligibility Certification. If the Service Provider is a corporation, the Service Provider certifies and declares by signing this Agreement that it is eligible to contract with the State of California pursuant to the California Taxpayer and Shareholder Protection Act of 2003 (Public Contract Code Section 10286, *et seq.*).
12. Nondiscrimination. In the performance of this Agreement the Service Provider and its consultants shall not deny the Agreement's benefits nor shall they discriminate unlawfully against any person on the basis of religion, color, ethnic group identification, sex, actual or perceived gender identity, age, physical or mental disability, medical condition, marital status, or age (over 40). Additionally, the Service Provider and its consultants shall insure that the evaluation and treatment of employees and applicants for employment are free of such discrimination as well.
- a. Service Provider shall comply with the provisions of the Fair Employment and Housing Act (Government Code Section 12900, *et seq.*), the regulations promulgated thereunder (California Code of Regulations, Title 2, Sections 11000, *et seq.*), and the provisions of Article 9.5, Chapter 1, Part 1, Division 3, Title 2 of the Government Code (Government Code Sections 11135-11139.5).
 - b. Service Provider shall permit access by representatives of the California Department of Fair Employment and Housing and the Trustees upon reasonable notice at times during normal business hours with at least 24 hours' notice, to its books, records, accounts, other sources of information, and its facilities as the Department or Trustees shall require to ascertain compliance with this Agreement.
 - c. Service Provider and its consultants/subcontractors shall give written notice of their obligations under this Agreement to labor organizations with which they have a collective bargaining or other agreement.
 - d. Service Provider shall include the nondiscrimination and compliance provisions of this Agreement in subcontracts to perform work under the Agreement (Government Code Sections 12990, 11135, *et seq.*, Title 2, California Code of Regulations, Section 11105)
13. Drug Free Workplace Certification. The Service Provider hereby certifies compliance with Government Code Sections 8355, 8356, and 8357 in matters relating to providing a drug-free workplace. In accordance with Government Code Section 8355, the Service Provider shall:
- a. Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations;
 - b. Establish a Drug-Free Awareness Program to inform employees about all of the following:
 - 1) The dangers of drug abuse in the workplace,
 - 2) The Service Provider's policy of maintaining a drug-free workplace,

- 3) Any available counseling, rehabilitation, and employee assistance programs, and
 - 4) Penalties that may be imposed upon employees for drug abuse violations;
- c. Require that each employee engaged in the performance of the Agreement be given a copy of the statement required by subpart A, and require that each employee, as a condition of employment on the Agreement, agree to abide by the terms of the statement.
14. Disabled Veteran Business Enterprise. Responsive to direction from the State Legislature (Public Contract Code Section 10115, *et seq.*), the Trustees are seeking to increase the statewide participation of disabled veteran business enterprises in contract awards. To this end, Service Provider shall inform the Trustees of any contractual arrangements with consultants or suppliers that are certified disabled veteran business enterprises.
 15. Assignment. The Service Provider shall not assign benefits or delegate duties under this Agreement in whole or in part, nor assign any moneys due or to become due hereunder without the written consent of Trustees.
 16. Successors. The provisions of this Agreement shall extend to and be binding upon and inure to the benefit of the heirs, executors, administrators, successors, and assigns to the parties hereto.
 17. Notice. Notice for either party may be served by delivering it in writing to the party, or by depositing it in a U.S. mail deposit box with postage fully prepaid addressed as shown within the information block of the Agreement page. Nothing herein shall preclude the giving of notice by personal service.
 18. Audit. If the Agreement exceeds \$10,000, the contracting parties shall be subject to the examination and audit of the State Auditor of the State of California and the California State University Auditor for a period of three years after final payment under the Agreement. This examination and audit shall be confined to those matters connected with the performance of this Agreement, including, but not limited to, the cost of administering this Agreement (Government Code Section 8546.7).
 19. DIR Registration. In accordance with Labor Code Section 1720, *et seq.*, the Service Provider shall register with the Department of Industrial Relations (DIR) for this project and pay at least the prevailing wages on services/work aspects where a prevailing wage applies. Such services and/or work aspects include, but are not limited to, the Service Provider or its sub-consultant's provision of geotechnical studies, potholing involving digging, site surveying and/or construction Inspector of Record services as defined by the DIR.
 20. Agreement Changes. Alteration or variation of the terms of this Agreement shall not be valid unless made in writing and signed and dated by the parties. Oral representations, understandings, or writings not expressly incorporated in the Agreement are void. Unless identified within Exhibit A, Scope of Work, under a separate sub-heading entitled 'Modifications to Agreement', it is the intent of the Trustees to use the standard published form of this Agreement and Rider A without modification. The Agreement and Rider A shall not be modified without review and concurrence by CSU Office of General Counsel.
 21. Offshoring of CSU Contract Work. Service Provider warrants it certified under penalty of perjury in its bid for this Agreement that the Agreement, and any subcontract performed under the Agreement, will be performed solely with workers within the United States; and if this Agreement, and any subcontract performed under this Agreement, will not be performed solely with workers within the United States, Service Provider described in its bid any parts of the work to be performed by workers outside of the United States. Further, Service Provider warrants no work will be performed under the Agreement with workers outside the United States, except as described in Service Provider's bid. If Service Provider or its sub-supplier performs the Agreement with workers outside the United States during the life of the Agreement, and Service Provider did not describe such work in its bid, Service Provider acknowledges and agrees that:

- a. CSU may terminate the Agreement without further obligation for noncompliance, and
 - b. Service Provider will forfeit to CSU the amount CSU paid for the percentage of work that was performed with workers outside the United States and not described in Service Provider’s bid.
22. **Limitation of Duties and Services.** The parties acknowledge and agree that the Service Provider’s duties and services under this Agreement shall not include engaging or advising on public contracting on behalf of the CSU. Specifically, Service Provider’s duties and services shall not include preparing or assisting the Trustees with any portion of the Trustees’ preparation of a request for proposals, request for qualifications, or any other solicitation regarding a subsequent or additional contract with the Trustees for a project. The Trustees entering into this Agreement shall at all times retain responsibility for public contracting, including with respect to any subsequent phase of any project. Service Provider’s participation in the planning, discussions, or drawing of project plans or specifications for a project shall be limited to conceptual, preliminary, or initial plans or specifications. Service Provider shall cooperate with the Trustees to ensure that all bidders for a subsequent contract on any subsequent phase of this project have access to the same information, including all conceptual, preliminary, or initial plans or specifications prepared by Service Provider pursuant to this Agreement.

End of Rider A

Exhibit ‘A’- Scope of work IDeAs Consulting, Inc.

1. Capability of Staff:

Mechanical and Electrical Systems Peer Reviews (MSR-ESR) under this agreement may be performed by internal staff but shall be coordinated and reviewed by the respective appointed Mechanical Review Board member prior to issuance of any review or correspondence.

2. Authorization of Work:

- A. Only the CSU trustees’ representatives may authorize work under this Agreement. Work shall typically be coordinated through an individual campus staff project manager or Capital Planning, Design and Construction (CPDC) at the CSU Office of the Chancellor.
- B. MSR and ESR fees are pre-established, based on construction costs of the project being reviewed. If a review is terminated due to cancellation of the project during design, payment will be made for work completed.
- C. The Trustees do not guarantee a minimum assignment of work to the Service Provider under this Agreement. Work assignments will be made at the discretion of the campus.
- D. The Service Provider shall seek to avoid conflicts of interest and the appearance of conflicts of interest by not accepting assignments where there is current contractual relationship between the Service Provider and the engineering firm whose work is being reviewed.
- E. Work assignments under this Agreement will be authorized by a Service Order and Authorization to Proceed (Exhibit B).
- F. Service Orders and Authorizations to Proceed may be issued under this Agreement during the Agreement term. Work authorized within the term of this Agreement may be conducted and completed after the expiration of the contract term of this Agreement unless the Agreement is terminated prior to the expiration of its term in writing by the trustees.
- G. The term of the “Service Order and Authorization to Proceed” shall begin on the date indicated on the Authorization and conclude with the completion of the project or its termination.

3. Mechanical Systems Review (MSR):

The MSR is a required review for CSU major capital projects. The ESR review is recommended, but optional and elective by the campus.

- A. For each project submitted and accepted for review, the Service Provider shall perform a Mechanical and/or Electrical Systems Review (MSR-ESR) of the building(s) or project.
- B. The primary purpose of the mechanical and electrical systems peer review is to offer a knowledgeable professional ‘second opinion’ and strategic insights on the functionality and efficacy of the project’s mechanical systems. Although code compliance comments may be presented as a part of this review, the review is not intended as a substitute for an independent code compliance check that the campus will typically be conducting separately to this work. While the peer review process supports the project’s design development, the project architect/engineer of record retains full responsibility for the design documents including their completeness and function.
- C. The Service Provider may suggest potential design options, analysis perspectives, and relay CSU Systemwide experience in materials performance considerations that the design team can build upon in the development of the project.
- D. The Service Provider may provide recommendations of possible methods for the resolution of technical issues encountered in the design and construction (the responsibility for implementing these suggestions rests completely with the Architect/Engineer of record).
- E. The Service Provider shall provide MSR-ESR during each design phase (Schematic, Preliminary, and Construction Documents). Develop review comments addressing the specific project. Categorize each comment into one of three tiers:
 - (1) Required: Must be resolved as part of the back-check process for project to move into next phase.
 - (2) Recommended: Review response must provide a defensible explanation including break-even point if cost is the primary determinant for a recommended comment not being incorporated.

- (3) Advisory: General recommendation that needs to be acknowledged by campus but is elective to be incorporated.

- F. If response resolution for Required or Recommended level comments cannot be reached at the campus level (differing professional opinions are perfectly reasonable), bring such issues to the attention of CPDC. CPDC will seek to achieve a broader secondary MRB Board consensus as needed and then CPDC will issue a timely resolution determination on the respective issue(s).
- G. Provide recommended corrections in the form of design review comments in Word (readable) format.
- H. For each review send copies to the campus project manager, design team, and to CPDC.
- I. During the construction phase of a project, the Service Provider shall be available as a part of this work as a resource to the trustees for review and assessment of technical issues that may be encountered.
- 4. MSR-ESR of Major Capital Design-Bid-Build and Construction Manager at Risk Projects:
 - A. During the Schematic Design Phase, the Service Provider shall:
 - (1) Participate in at least one meeting with campus personnel and the project architect/engineer of record at the campus. Become familiar with project scope, project goals, physical constraints, established budget, and campus design guidelines. Identify critical systems and equipment requiring seismic certification and bracing, examine the available information on the condition of the campus infrastructure and site utilities and point for interconnection, condition and capacity of building(s) systems, review the engineering concepts employed to achieve energy efficiency criteria, and discuss basis of design concepts and potential alternatives with the project team. When providing an ESR, become familiar with project scope, project goals, physical constraints and established budget, campus design guidelines, identify critical systems and equipment requiring seismic certification and bracing, review the available information on the condition of the campus electrical power and IT infrastructure and interconnection requirements, building(s) electrical and IT systems, discuss capacity constraints, review the engineering concepts employed to achieve energy efficiency criteria, lighting and energy controls, emergency power and life safety, and discuss basis of design concepts and potential alternatives with the project team.
 - (2) Approximately 75% through Schematic Design phase, in anticipation of a CPDC project review, provide a letter to the campus stating the MSR-ESR reviewer concurs (or not) with the proposed design approach of the mechanical systems.
 - (3) Continuing with the peer review and involvement through the completion of the Schematic Design Phase.
 - (a) Review submittal documents including the plans and outline specifications, basis of design report, schematic level construction cost estimate and life cycle cost analysis of various systems analyzed and the proposed system and identify if submittal is materially complete; and
 - (b) Develop review comments taking into account the building, building site, and local environmental conditions; and
 - (c) Focus on confirming fundamental design assumptions and validating concepts, systems, and integration. The review at this phase is the most 'strategic' and the most critical.
 - B. During the Preliminary Design Phase:
 - (1) Review project plans, outline specifications, construction cost estimate, and the basis of design report.
 - (2) Focus on confirming concepts, systems, and assumptions. The review at this phase shall seek to confirm that the implementation of the 'approved' schematic documents is being appropriately developed and resolved. Assess if the project is 'on target' to provide a well-functioning, energy efficient facility within the established budget.
 - C. During the Construction Document Phase:
 - (1) Review updates to the basis of design report, project specifications and construction cost estimate to confirm that the design is consistent with the design approved from the Preliminary Design phase.

- (2) Review the State of California Title 24 Energy Efficiency performance model to confirm the inputs match the Construction Documents. Confirm that project specifications include requirements of the State of California Title 24 Energy Efficiency Standards Acceptance Certificates.
- (3) Review the ninety-five percent (95%) plans including mechanical, plumbing, controls (including sequence of operations), and building automation system. The ESR shall review the electrical plans including normal power, emergency power, lighting and lighting controls, plug load controls, IT service, metering and electrical systems sequence of operations, and building automation system interface.
- (4) Confirm that the construction documents submitted for review include complete equipment schedules, energy compliance forms, floor plans, flow diagrams, sections and details. The ESR shall confirm that the construction documents submitted includes complete power system studies including short circuit, coordination and arc flash hazard, completed load schedules; energy compliance forms, power and lighting plans, single line diagrams, sections and details. The Service Provider shall inform the campus project manager if the submittal is materially incomplete.
- (5) Provide copies of Construction Document reviews to the campus-assigned plan check review firm separately providing review work on the project. This will be reciprocal to the Service Provider as well so that initial plan checks and MSR-ESR comments are shared and considered in the development in each respective review. It is not necessary to incorporate these plans check comments or to delay the MSR-ESR peer review pending the plan check back-check resolution. It is necessary to secure the plan check initial review and consider it prior to the Construction Document phase MSR-ESR review report issuance. Coordinate with the campus for plan review firm contact information.

5. MSR-ESR of Design-Build Projects:

MSR-ESR of Design-Build Projects shall generally follow the procedures for Design-Bid-Build projects set forth above, but shall modify the review emphasis to reflect differences in delivery methods (i.e., limited review of costs in later phases, and more focus on confirming that quality/functionality is not being diminished from that agreed to at the end of Schematic Design phase).

6. Back-Check Review:

- A. Provide back-check review(s) of resubmitted plans during the course of the project. This back-check shall include an assessment of whether comments made in the prior reviews have been addressed and identify any prior comments that have not been satisfactorily addressed and their impact on the project if constructed as presented.
- B. Issue copies of back-check comments to campus, design team and CPDC.
- C. At the completion of the design review provide a letter to the campus with an electronic copy to the CPDC that MSR/ESR comments have been resolved to the satisfaction of the reviewing board member.

7. Project Deliverables and Distribution:

- A. MSR/ESR peer review reports at Schematic, Preliminary and Construction Document phases.
- B. Issue copies to campus, project design team, and CPDC for each review and back-check.
- C. Issue a copy of the Construction Document peer review and back checks to the campus assigned plan check review firm separately providing services on this project.
- D. Distribute copies of reports and back-checks via email.
- E. Marked up plan sets are not required or desired.
- F. Issue hard copy letters of concurrence to the campus at the completion of each review.
- G. Provide copies of reports and letters to CPDC via email.
- H. Provide a copy of the final letter of concurrence to the plan check review firm via email.

8. Coordination with Mechanical Review Board:

MSR-ESR Reviewer shall periodically report to the Mechanical Review Board (MRB) on review issues and concerns that may have CSU Systemwide implications and advise on how the MSR and ESR review process can be improved and/or streamlined in the future.

9. Extra Services:

- A. Extra Services Authorization shall be at the discretion of the trustees and shall not include work that is incidental to a MSR-ESR. Extra Services are not anticipated to be needed in the typical course of providing these reviews. The following would be examples of potential Extra Service work:
 - (1) Pre-design project studies.
 - (2) Extended participation in campus design development beyond peer review, such as additional attendance at project design meetings or project site visits beyond the initial campus kick-off participation that is a part of the base MSR-ESR scope.
 - (3) Substantial stop/restart or re-characterization of original peer review scope.
 - B. Extra Services require pre-authorization in writing by the project manager.
10. Reimbursable Expenses:
- A. The fee for a Service Provider’s MSR-ESR is inclusive of expenses incidental to this work. Reimbursable expenses are not anticipated in the typical course of providing a MSR-ESR.
 - B. The following are not reimbursable expenses:
 - (1) Travel expenses incurred for one (1) trip to the campus during the schematic phase is a part of this scope.
 - (2) Shipping charges, phone calls, faxes, consumables, etc. occurring in the course of providing the MSR-ESR services under this Agreement.
 - C. Additional travel when requested by the campus may be reimbursable as part of an Extra Service.
11. Project Administration:

The master agreement and scope for this project is managed centrally by the Office of the Chancellor. Individual campuses are authorized to secure (and pay for) services under this agreement. All correspondence regarding design review activities and processes shall be sent to Ebi Saberi, University Architect with a copy to Lindsey Rowell, Chief of Energy, Sustainability, and Transportation.
Direct inquiries as to process, review challenges and all general agreement questions to:

California State University, Office of the Chancellor
Capital Planning, Design and Construction
401 Golden Shore, 4th Floor
Long Beach, California 90802-4210
Attention: Rachel Patterson, Chief Energy, Sustainability, and Transportation
Telephone: (562) 951-4017
Email: rpatterson@calstate.edu

Direct inquiries regarding individual projects and normal review interaction to the respective campus authorizing the work.

End of Exhibit A

THE CALIFORNIA STATE UNIVERSITY

**Exhibit 'B'- Service Order and Authorization to Proceed,
[Mechanical] [Electrical] Systems Review**

[Date]

Mr. Kaneda
IDeAs Consulting, Inc.
21350 Vai Avenue
Cupertino, CA 95014

Dear Mr. Kaneda

[Project Name], [Project Number]
[Campus]
Service Order and Authorization to Proceed Number [insert]

In accordance with the provisions of the Systemwide Master Enabling Agreement Number [insert] you are hereby authorized to provide [insert as appropriate].
[Provide mechanical systems peer review for the subject project].

The Service Provider shall not perform services in excess of this Service Order without prior written authorization to proceed from the University.

Service Provider shall coordinate services with:

[CSU Campus Name]
[Campus Department]
[Executive Dean or designated campus project manager]
[Campus Address]
[Campus Project Manager's Phone Number]

The total amount to be expended under this Service Order shall not exceed [written and numerical dollar value] inclusive of reimbursables, regardless of Service Provider's cost in performing these services. Service Provider shall submit all invoices with the Agreement and Service Order and Authorization to Proceed number on each invoice to the project manager named above.

Questions regarding this authorization shall be directed to the above-named project manager.

Approved:

Fund Certified:

[Name]
[Department Head]
[Department]

[Name]
[Accounting/Fiscal Officer]
[Department]

cc:

**Exhibit ‘C’- Service Provider Rate Table
 IDeAs Consulting, Inc.**

1. Fee Schedule:

Capital Projects: MSR-ESR fee shall be computed in accordance with the fee schedule shown below. Fees are based on total project construction budget as identified in the project budget (CSU Form CPDC 2-7, Total Construction). The construction budget for the project may be obtained from the campus project manager or directly from CPDC A/E. Fee schedule is as follows:

Total Construction Value (CSU Form CPDC 2-7, Line 5)	Mechanical Systems Review Lump Sum Fee	Electrical Power and Lighting Systems Review Lump Sum Fee
Less than \$634,000	Negotiated	Negotiated
\$634,000 to \$2,000,000	\$6,000.00	\$6,000.00
\$2,000,001 to \$6,000,000	\$8,000.00	\$8,000.00
\$6,000,001 to \$10,000,000	\$10,000.00	\$10,000.00
\$10,000,001 to \$30,000,000	\$12,000.00	\$12,000.00
\$30,000,001 to \$50,000,000	\$15,000.00	\$15,000.00
Over \$50,000,001 to \$90,000,000	\$18,000.00	\$18,000.00
Over \$90,000,000	\$22,000.00	\$22,000.00

2. Payment and Invoicing:

- A. Payments for services shall be made in arrears for work completed to the satisfaction of the trustees upon presentation of a written invoice.
- B. Payments will be authorized at the following milestone points:
 - (1) Fifty percent (50%) upon completion Preliminary Phase Review.
 - (2) Fifty percent (50%) upon completion Construction Document Phase Review.
- C. Extra services, if any, shall be paid in arrears when completed.
- D. Reimbursable expenses, if any, shall be paid in arrears when incurred.
- E. Invoicing for services and reimbursable expenses shall:
 - (1) Be sent to the campus named in the Service Order and Authorization to Proceed.
 - (2) Identify campus, project name, project reference number, Service Authorization Order number.
 - (3) Indicate work and the percentage completed.

End of Exhibit C



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

11/15/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER AssuredPartners Design Professionals Insurance Services, LLC 19689 7th Ave NE, Ste 183, PMB #369 Poulsbo WA 98370	CONTACT NAME: Rhonda Ausbun PHONE (A/C. No. Ext): 360-483-2126 FAX (A/C. No): 360-483-2126															
	E-MAIL ADDRESS: rhonda.ausbun@assuredpartners.com															
License#: 6003745 IDEACON-01		<table border="1"> <thead> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A : RLI INSURANCE COMPANY</td> <td>13056</td> </tr> <tr> <td>INSURER B : Hudson Insurance Company</td> <td>25054</td> </tr> <tr> <td>INSURER C :</td> <td></td> </tr> <tr> <td>INSURER D :</td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : RLI INSURANCE COMPANY	13056	INSURER B : Hudson Insurance Company	25054	INSURER C :		INSURER D :		INSURER E :		INSURER F :	
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INSURED IDeAs Consulting Inc 21350 Vai Avenue Cupertino CA 95014																

COVERAGES **CERTIFICATE NUMBER:** 269948000 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	Y	Y	PSB0008975	8/1/2024	8/1/2025	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	<input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY	Y	Y	PSB0008975	8/1/2024	8/1/2025	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<input type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
A	<input type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	PSW0004979	8/1/2024	8/1/2025	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	Professional Liab; Claims Made			PRB0619119394	8/1/2024	8/1/2025	\$1,000,000 Per Claim \$2,000,000 Aggr

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 The certificate holder is an additional insured per the attached.
 Insured owns no company vehicles; therefore, hired/non-owned auto is the maximum coverage that applies.
 California State University, the State of California, the trustees of the California State University, their officers, employees, representatives, volunteers, and agents are additional insureds regarding the general liability and auto liability per attached. General liability is primary and non-contributory per attached. For claims related to the work, the Service Provider's general liability insurance coverage shall be primary insurance as respects the State of California, the Trustees of the California State University, the University, their officers, employees, representatives, volunteers, and agents. Insurance or self-insurance maintained by the State of California, the Trustees of the California State University, the University, their officers, employees, representatives, volunteers, and agents shall be in excess of the Service Provider's insurance and shall not contribute with it. The State of California, the Trustees of the California State See Attached...

CERTIFICATE HOLDER California State University 401 Golden Shore, 4th Floor Long Beach CA 90802	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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ADDITIONAL REMARKS SCHEDULE

AGENCY AssuredPartners Design Professionals Insurance Services, LLC		NAMED INSURED IDeAs Consulting Inc 21350 Vai Avenue Cupertino CA 95014	
POLICY NUMBER		EFFECTIVE DATE:	
CARRIER	NAIC CODE	(Empty)	

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: 25 FORM TITLE: CERTIFICATE OF LIABILITY INSURANCE

University, the University, their officers, employees, representatives, volunteers, and agents shall not by reason of their inclusion as additional insureds incur liability to the insurance carriers for payment of premiums for such insurance.

Policy Number: PSB0008975
Named Insured: DeAs Consulting Inc

PSB0008975

PSW0004979

RLI Insurance Company

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

RLIPack[®] NOTICE OF CANCELLATION OR NONRENEWAL – DESIGNATED PERSON OR ORGANIZATION

Schedule

Designated Person or Organization:

— California State University

Email Address:

US Mail Address:

— 401 Golden Shore, 4th Floor
Long Beach, CA 90802

If we cancel or chose to nonrenew this policy for any reason other than nonpayment of premium we will provide written notice at least (30) days before the effective date of the cancellation or nonrenewal to the designated person or organization in the above schedule.

Such notice will be sent via the US mail address or E-mail address listed above. Proof of mailing or e-mailing will be sufficient proof of notice.

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

RLIPack[®] FOR PROFESSIONALS BLANKET ADDITIONAL INSURED ENDORSEMENT

This endorsement modifies insurance provided under the following:

BUSINESSOWNERS COVERAGE FORM - SECTION II – LIABILITY

1. C. WHO IS AN INSURED is amended to include as an additional insured any person or organization that you agree in a contract or agreement requiring insurance to include as an additional insured on this policy, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused in whole or in part by you or those acting on your behalf:

- a. In the performance of your ongoing operations;
- b. In connection with premises owned by or rented to you; or
- c. In connection with "your work" and included within the "product-completed operations hazard".

2. The insurance provided to the additional insured by this endorsement is limited as follows:

- a. This insurance does not apply on any basis to any person or organization for which coverage as an additional insured specifically is added by another endorsement to this policy.
- b. This insurance does not apply to the rendering of or failure to render any "professional services".
- c. This endorsement does not increase any of the limits of insurance stated in **D. Liability And Medical Expenses Limits of Insurance**.

3. The following is added to **SECTION III H.2. Other Insurance – COMMON POLICY CONDITIONS (BUT APPLICABLE ONLY TO SECTION II – LIABILITY)**

However, if you specifically agree in a contract or agreement that the insurance provided to an

additional insured under this policy must apply on a primary basis, or a primary and non-contributory basis, this insurance is primary to other insurance that is available to such additional insured which covers such additional insured as a named insured, and we will not share with that other insurance, provided that:

- a. The "bodily injury" or "property damage" for which coverage is sought occurs after you have entered into that contract or agreement; or
- b. The "personal and advertising injury" for which coverage is sought arises out of an offense committed after you have entered into that contract or agreement.

4. The following is added to **SECTION III K. 2. Transfer of Rights of Recovery Against Others to Us – COMMON POLICY CONDITIONS (BUT APPLICABLE TO ONLY TO SECTION II – LIABILITY)**

We waive any rights of recovery we may have against any person or organization because of payments we make for "bodily injury", "property damage" or "personal and advertising injury" arising out of "your work" performed by you, or on your behalf, under a contract or agreement with that person or organization. We waive these rights only where you have agreed to do so as part of a contract or agreement with such person or organization entered into by you before the "bodily injury" or "property damage" occurs, or the "personal and advertising injury" offense is committed.

ALL OTHER TERMS AND CONDITIONS OF THIS POLICY REMAIN UNCHANGED.

WAIVER OF OUR RIGHT TO RECOVER FROM OTHERS ENDORSEMENT—CALIFORNIA

We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule. (This agreement applies only to the extent that you perform work under a written contract that requires you to obtain this agreement from us.)

You must maintain payroll records accurately segregating the remuneration of your employees while engaged in the work described in the Schedule.

The additional premium for this endorsement shall be 2% of the California workers' compensation premium otherwise due on such remuneration.

Schedule

Person or Organization

All persons or organizations that are party to a contract that requires you to obtain this agreement, provided you executed the contract before the loss.

Job Description

Jobs performed for any person or organization that you have agreed with in a written contract to provide this agreement.

Signature: *Kelly Cox*

Email: kcox@calstate.edu

This endorsement changes the policy to which it is attached and is effective on the date issued unless otherwise stated.

(The information below is required only when this endorsement is issued subsequent to preparation of the policy.)

Endorsement Effective 08/01/2024

Policy No. PSW0004979

Endorsement No.

Insured IDeAs Consulting Inc

Insurance Company
RLI Insurance Company

Countersigned By _____