BART Agreement Number: 6M8209 **Approval Date: 10/19/2026**

Work Plan A.05-04 DSDC for TCCCP New Traction Power Facilities, Eastbay

Scope:

The Consultant shall provide the following scope of services:

Task 1: Project Management and Project Administration
The following tasks describe the scope of work required to manage and administer the project.

Subtask 1.1 - Management and Administration
The Consultant Project Manager will perform the following activities in support of the project:

- Supervise and coordinate workplan activities
- Workplan communications/meetings/record keeping
- Workplan progress reporting

The Consultant Project Manager will be responsible for making sure the Consultant's Design Team follows the Project Management Plan (PMP) and Quality Management Plan (QMP) established for this Contract for the purposes of documenting policies, procedures, and responsibilities throughout the life of the work plan.

It is anticipated that work plan administration will include the following items:

- Invoices and monthly progress reports
- Work progress reporting
- Highlight of significant issues requiring resolution
- Financial reporting/tracking

Subtask 1.2 - Document Control
Documents and electronic files, CAD drawings, transmittal forms, letters, correspondence, and other miscellaneous documents will be managed using ProjectWise, SharePoint and/or other appropriate formats.

Subtask 1.3 – Change Notification
The Design team shall notify the BART PM of design changes that require resubmission to the AHJ, transit authority or other permitting agency at the time the change is proposed.

Task 2: Additional Design Services
The following tasks describe the scope of work required to manage and administer the project.

Subtask 2.1 – Procurement Period Support
The Consultant will provide project support during bidding, evaluation, and award.

The Consultant will produce a "Conformed Kit" of Contract Documents. Per BFS, this updates drawings and specifications modified via addendum during the contract bid period. Deliverable include signed and sealed drawings and specifications.

Subtask 2.2 – Additional Design of PG&E Transformer at KTF Site

Consultant will provide design services for additional design required for the location, mounting of, and interfacing with, the PG&E transformer at the KTF site. The Consultant shall also coordinate the re-design with the rest of the KTF package. Final design of the PG&E transformer will be completed by February 26, 2027, contingent upon timely reviews, feedback, and approvals by stakeholders including BART, PG&E, City of Oakland, and/or Caltrans.

Subtask 2.3 – JUMA Revisions

Consultant will provide design services for additional revisions to the JUMA exhibits as requested by Caltrans and BART.

Subtask 2.4 – Support for OSFM Permitting

Consultant will provide design services and support for Office of the State Fire Marshal (OSFM) permitting. Tasks may include meetings, modifications to drawing and specifications, drawing/package preparation, document upload/management, and responses to comments. Work includes development of drawings including Site Access, Life Safety, and Code Analysis and Checklist sheets to facilitate OSFM reviews and approvals.

Task 3: As-Needed Design Services During Construction

Consultant shall provide design services to support material procurement and construction via reviews and responses to construction/procurement submittals and RFI's.

Subtask 3.1 – Participation in Pre-Construction Activities and Ongoing Activities

The Consultant will provide the appropriate personnel to attend the Pre-Construction Meeting as a technical resource.

- The Consultant will provide technical clarifications and responses within 3 business days regarding Contract Drawings and Specifications as questions arise prior to the start of construction.
- The Consultant will review the submitted preliminary submittal list within 5 days to confirm completeness against design requirements.
- The Consultant Project Manager, or designated representative, will participate in project progress meetings and other meetings, as needed.
- The Consultant shall support BART purchasing efforts where necessary.

Subtask 3.2 – Technical Review of Contractor Submittals

The Consultant will review submittals for conformance with design intent, Contract Drawings, and Contract Specifications. The Consultant will return review comments using standard review action designations per Specifications Section 01 33 00, Submittal Procedures.

- Submittals will be responded to in 10 working days for initial submittals, and 3 business days for resubmittals, or as directed by the BART PM. The Consultant shall

notify the BART PM within 1 business day of receipt if the submittal cannot be reviewed within the standard window, due to volume or complexity.

- The Consultant will provide written commentary on nonconforming submittals with references to the applicable specification section, drawing, and/or standard. Comments shall be specific and actionable. The Consultant shall return submittals on a standard review stamp or cover sheet, with each comment itemized and numbered, and clearly indicating the review action designation.
    - Submittals with non-conformances or disposition of 'Rejected' must have specific review comments to provide evidence and explanation of the disposition.
    - Notify the BART PM of any submittals with proposed disposition of 'Not Reviewed.'
- The Consultant will maintain an independent log of submittal and RFI documents, however it is the responsibility of BART's field engineering team to maintain complete records of all documents approved for use in the field. This log shall be made available to the BART PM upon request and shall be reconciled with the RE's submittal register at regular intervals.

Subtask 3.3 – RFI and NCR Technical Responses

The Consultant will review Contractor Request for Information (RFI) and Non-Conformance Reports and provide technical responses. The Consultant will coordinate multi-discipline RFI responses as needed. The Consultant will provide written responses on BART's standard RFI form, or the format required by the Engineer's document management system.

- Standard RFIs will be responded to in 3 business days. The turnaround of complex RFIs requiring calculations or multi-discipline coordination shall be directed by the BART PM. The Consultant shall notify the BART PM within 1 business day of receipt if the RFI cannot be answered within the standard window.
- The Consultant will review and respond to NCRs in 3 business days.
- Responses shall directly and completely answer the RFI question posed, or address the proposed corrective actions of NCR. Where response requires judgement or interpretation, the Consultant shall state the design basis of that judgement. Responses shall not be ambiguous, non-committal, or simply restate the Contract Drawings or Specifications without interpretation.
- The Consultant shall provide sketches, marked-up drawing details, or supplemental calculations as necessary as an attachment to the RFI response. Sketches shall be clearly labeled, dated, and initialed by the responsible engineer.
- The Consultant will flag any RFI or NCR that, in the Consultant's judgement, represents a potential Change in scope, differing site condition, or an error or omission in the Contract Documents. The potential change in scope shall be explicitly flagged in the RFI response, with brief explanation. The Consultant shall not be responsible for resolving scope or cost implications in an RFI response.

Subtask 3.4 – Design Clarifications and Supplemental Instructions

The Consultant will prepare Field Clarification Notices (FCNs) or Supplemental Instructions (SIs) when required. The Consultant will provide revised design details, sketches, or supplemental drawings to address conditions identified during construction as applicable. The Consultant shall develop and provide permanent systems settings as requested by

BART (Equipment settings are provided by the Contractor/Vendor and reviewed). The Consultant shall coordinate clarifications across all design discipline. FCNs and SIs shall be prepared on a standard form to be agreed with the BART PM prior to construction start.

- FCNs and SIs shall be complete and self-contained, such that a field crew or inspector will understand what is required without reference to prior correspondence. Where clarification modifies a dimension, elevation, material, or installation method shown in the Contract Drawings, the Consultant shall include a revised detail or sketch.
- Each FCN/SI shall include: a unique sequential number, the date of issue, the originating RFI or condition that prompted the clarification (if applicable); the affected drawings and/or specification sections; and the responsible engineer's stamp and signature.
- The Consultant shall not issue an FCN or SI to authorize work that constitutes a Change in Scope or material deviation from the Contract requirements. Where a field condition requires a Change, the Consultant shall advise the Engineer accordingly.
- The Consultant will transmit FCNs and SIs to the BART PM and Engineer and shall not issue directly to the Contractor.

Subtask 3.5 – Technical Support for Contract Changes or Value Engineering

The Consultant provide technical support in the evaluation of Contractor change proposals and Contractor Value Engineering proposals.

- The Consultant will prepare scope descriptions and design documentation for proposed changes involving modifications to the design or Contract Specifications, as directed by the BART PM.
- The Consultant will review Contractor Change Proposals for technical accuracy and consistency with scope.
- The Consultant shall review and respond to Contractor Value Engineering (VE) proposals for technical merit and design compatibility. The written response shall address each element of the Contractor's VE proposal, clearly stating whether each element is acceptable, conditionally acceptable, or not acceptable, with reasoning. The review shall evaluate technical equivalence to the specified design, compatibility with adjacent systems and overall design intent, life-cycle implications, and any impact on safety-critical systems, BART operational standards, or third-party agreements. The Consultant will independently assess whether the Contractor's claimed savings are realizable given design and procurement realities.
- The Consultant will prepare design sketches or revised drawings required to define the scope of changed work.
- The Consultant will prepare the Engineer's independent cost estimate (ICE) and time assessment [which shall not be anchored to or derived from the Contractor's proposal]. The ICE shall separate labor, materials, equipment, and any applicable subcontractor costs, and shall identify the basis for each line item. The ICE shall be sufficiently detailed for the RE to use as the basis for a pre-negotiation plan. Estimate shall also include an assessment of schedule impact, specifically whether the changed work affects the crucial path. Where the Consultant's estimate and Contractor's change proposal differ materially, the Consultant shall

provide the Engineer with a written reconciliation identifying the source of discrepancy.

- The Consultant will advise on any design change that may require re-evaluation of arc flash hazard boundaries, protective relay coordination, or utility interconnection agreements.
- The Consultant will update and maintain the RPA and CMR Stormwater Memo and associated attachments for compliance if design changes are made during Construction.

Subtask 3.6 – Periodic Site Observations

The Consultant shall conduct periodic site observations visits to each substation location, once per month (or as agreed upon with the BART PM) in addition to milestone visits. The Consultant will prepare a written Site Observation Report (SOR) following each visit, documenting observations, noted deviations, photographic record, and recommended actions if any. The Consultant shall promptly notify BART of any observed non-conformance with Contract Drawings or Specifications on the day of observation.

- The Consultant shall transmit the SOR within 3 business days of each site visit.
- SORs shall be written on a standard template to be agreed with the BART PM prior to construction start. SOR to include date and time of visit, substation locations visited, names of Consultant personnel present, names of Contractor and Engineer personnel encountered, weather conditions, a description of work observed, photographs with captions, noted conformances and non-conformances, and any recommend actions with a recommended responsible party and timeframe.
- SORs shall be factual without vague observations. Observations shall reference the applicable Contract Drawing or Specification section against which the work was assessed. Non-conformances shall be described precisely, noting what was observed, what was required, and where the discrepancy was located.
- Each SOR shall include at least one photograph.
- The BART PM shall identify and notify the Consultant of the attendance of milestone visits (minimum 14 days advanced notice). Key construction milestone observations shall include:
    - Foundation and civil construction (excavation, concrete pours)
    - Major equipment setting (transformers, rectifiers, switchgear)
    - Conduit, raceway, and cable installation
    - Grounding and negative return system installation
    - Electrical connections and terminations
    - Pre-energization readiness review

Task 4: As-Requested Design Support

Consultant will provide engineering evaluation, design, review, or other support as-needed by BART's engineering departments and as directed by the BART PM. Exact scope and delivery of as-needed support shall be outlined in requests made by BART.

b) This workplan will provide engineering support to review vendor submittals, coordinate with BART procurement team for ordering special materials, and will support engineering inspection to resolve RFIs including differing and unforeseen site conditions.
    1. It is assumed that standard RFI's and submittals will average 6 hours with a total combined value of 600 items for this workplan. It is assumed that a subset of these items will be considered complex and require additional time and will be elevated and noted to the BART PM.
    2. Vendor shop drawings for AC and DC Equipment Houses are assumed to be lengthy and complex contractor submittals and will require additional time to complete reviews. It is assumed that these will require up to 80 hours per structure to complete review and dispositions and include two rounds of reviews. This effort may need to be extended based on the quality of the contractor/vendor submittal and number and length of required meetings or workshops needed to resolve comments.
    3. Submittals for KTF jack-and-bore crossing and the required coordination with BART operations, engineering, and other groups is anticipated to be significant and
c) 40-hour RWP training for Consultant Safety Lead and 4-hour RWP training for individuals is included.
d) Record drawing preparation is excluded.
e) Geotechnical support has been included for limited as-needed engineering support during construction such as geotechnical (settlement) monitoring or surveying for differing/changing site conditions.
f) It is understood that this DSDC workplan will not cover the full duration of the project's construction.
g) Subconsultant services will be provided on an as-needed basis depending on the needs of the project.
h) Support meetings such as BART-requested project updates, coordination meetings with other projects, and focused technical meetings are considered as-requested design support.
i) Timing and level of effort for consultant design support is contingent upon contractor schedules, quality of contractor documents, and BART needs for support. Budget may need to be shifted between tasks within this workplan and/or durations may need to be modified over the duration of this workplan.

Prime: HNTB-FMG JV

Subconsultants	Amount
BESS Testlabs. Inc.	**$ 13,545**
ENGEO Incorporated	**$ 29,560**
Merrill Morris Partners	**$ 13,396**

Total Work Plan Value: $ 1,998,000