

A133 Attachment #3
Description of Preconstruction Phase Services
General Contractor/Construction Manager Preconstruction Services
Educational Services Center (ESC) HVAC/Lighting/Roof Upgrades Project
Edmonds School District
June 10, 2021

I. GENERAL

The GC/CM shall actively participate as a member of the Project team with the Owner, the Architect, and Owner's other consultants during all design phases prior to the Construction Phase. The GC/CM shall be responsible for providing the necessary consulting expertise to ensure the Owner's goals for Project scope, budget, quality, and schedule are met.

During the Preconstruction Phase, the GC/CM shall provide necessary professional personnel to fulfill the GC/CM's obligations to perform the required Preconstruction Services, including but not limited to those who were named in response to the *Request for Qualifications for GC/CM Services* and participated in the selection interview. These professional personnel shall include but are not limited to a single project manager or higher-level manager to attend regularly all meetings described herein and provide or oversee the services the GC/CM is obligated to perform to ensure development of a functional, constructible, high quality, and cost-effective Project.

Work to negotiate the GMP/MACC is not a part of the work contemplated under this section and will not be reimbursed by the Owner.

The descriptions below summarize but do not necessarily include all work required by the Contract. Also see the A133 Agreement.

The not-to-exceed amount for Preconstruction Services is set forth in the Contract. If the MC/CM and/or EC/CM approach is used, its costs will be in addition to these amounts.

II. PRECONSTRUCTION

A. PRELIMINARY DESIGN PHASE RESPONSIBILITIES

In addition to the general services normally provided by a GC/CM during the Preconstruction Phase, the GC/CM shall provide the following services:

- 1) Attend approximately six (6) project management meetings with the Owner and Architect. Attend, as requested, specific design discipline meetings with the Owner and Architect for the purpose of contributing to and helping develop the design. Attend pre-application conferences with governing jurisdictions. Attend one (1) Design Phase review meeting conducted by the Owner. Attend one (1) School District Board of Directors business meeting.
- 2) Develop with the Owner and Design Team a work plan for current and subsequent phases that incorporates processes that reflect a collaborative approach to achieving the Owner's goals for the project.
- 3) Examine and review existing site and building assessments made by the Architect and others and, if necessary, recommend and provide, when authorized by the Owner, additional tests or investigations to verify existing conditions and/or capability of existing systems.
- 4) Review and update the Owner's preliminary Project schedule, including potential construction phasing, to ensure its viability and make recommendations.
- 5) Make a recommendation to the Owner on whether to consider MC/CM and EC/CM procurement for the Project. If approved by the Owner, develop procurement documents and manage the selection processes for MC/CM and EC/CM subcontractors, and complete the selections as early as possible.
- 6) Provide and present a preliminary site logistics plan to maintain safety during construction.

Temporary provisions should be included, such as: controls for vehicular and pedestrian circulation and access in and around the site, offices, utilities, stormwater management facilities, waste management facilities, material delivery, hoisting and lay-down areas.

- 7) Review draft Division 1 documents prepared by the Architect to match design conditions and SGC and NSS requirements.
- 8) Comment on construction feasibility, constructability, and safety including alternative sequencing of work, designs or materials, if appropriate, including estimating services when requested by the Architect and approved by the Owner to evaluate critical elements of the design as they are formulated.
- 9) Monitor the development of the design documents. Update cost savings tracking system monthly for discussion at project management meetings. Provide cost savings and constructability reviews of specific elements of the design when requested by the Architect and approved by Owner.
- 10) No later than the 50% completion point of the Design Phase, prepare a preliminary, time-scaled master summary schedule bar chart and tabular report representing planned progress of the total Project in adequately detailed activities from the end of design through the notice to proceed with construction to Final Completion utilizing the latest version of Microsoft Project or similar software acceptable to the Owner. This schedule shall reflect the concept indicated in the preliminary Project schedule or changes to that concept as may have been developed. The summary schedule shall identify work to be performed by the Architect, the GC/CM and Owner, including permitting and other influencing work and the work of major Subcontractors. In developing the activities for this schedule, the GC/CM shall consult with both the Owner and Architect to ensure that the responsibility for and duration of activities that involve their work are acceptable and accurate. Indicate milestones for early subcontract buyout packages and/or material procurement packages. The summary schedule shall accurately summarize the anticipated detailed schedule that is to be submitted as the GC/CM's Project schedule.
- 11) Prepare the Subcontracting Plan defined in Section 2.1.6 of the A133 Agreement for the Owner's approval. Identify all proposed subcontract bid packages, any contemplated alternative subcontractor selection process permitted by RCW 39.10, all subcontract bid packages for which the Construction Manager expects to compete, preliminary subcontractor scopes of work, the timing of solicitation of subcontractor bids for the packages to meet the Project schedule, major coordination issues with other packages, efforts to generate interest in the subcontractor community, and means to enhance the opportunity for local businesses to participate in performing the work. Determine whether to make a pre-bid determination of subcontractor eligibility as permitted in RCW 39.10.400.
- 12) Identify long-lead subcontract bid packages and material procurement packages that could be advertised prior to the completion of Construction Documents. If the Owner concurs that the Project will benefit and funds are available, the Owner may, at its option, elect to authorize the GC/CM to advertise and award subcontracts or material procurements for long lead-time items in advance of completion of Construction Documents in accordance with the Contract Documents. The Owner's decision not to authorize these early activities shall not constitute delay. The GC/CM assumes any and all risks related to or associated with its recommendation to advertise and award subcontracts and/or material procurements in advance of the completion of Construction Documents, including but not limited to increased Cost of the Work caused by escalation, inflation, market conditions, or further development of the Construction Documents. All provisions of this Contract, RCW 39.10.210, and 39.10.340 through 39.10.410 otherwise applicable to subcontract bidding shall apply to any early advertising and award of subcontracts and/or material procurements.
- 13) Review the final Drawings and Specifications and provide value engineering recommendations and coordination and constructability comments on the design to the Owner and Architect. Conduct and provide a safe-working condition hazards analysis. Verify that accepted cost savings recommendations are implemented.

- 14) Prepare a construction cost estimate for the entire work in CSI modified Unifomat, or other format approved by the Owner, based upon the Design documents and the BIM model. Upon completion of the estimate, the GC/CM and the Owner's estimator shall reconcile their estimates and present to the Owner one estimate of the construction cost based upon mutually agreed assumptions including: phasing, scheduling requirements, the date of commencement of construction, duration of construction, escalation factors, design contingency, and Negotiated Support Services. The cost estimate shall be updated to include the Owner's and GC/CM's document review comments to achieve a total reconciliation of the cost estimate.
- 15) In the event that the reconciled estimate is higher than the Owner's budget, and as directed by the Owner, the GC/CM shall present to the Owner a list of cost-savings equal to or greater than the amount by which the estimate exceeds the budget and continue to work with the Architect to define a scope that is within the budget. The GC/CM will create and maintain a cost savings tracking system which identifies each cost saving proposal, provides a cost estimate of the savings to the Project if the cost saving proposal is accepted, indicates the date by which a decision must be made to incorporate the cost saving proposal, indicates the current status of the cost saving proposal and the team member with current action, and the date the cost saving proposal was accepted or rejected. Until the reconciled estimate amount is equal to or less than the MACC, or until the Owner increases the MACC, the Architect will not proceed to the Construction Documents phase.
- 16) Conduct a multiple stage, integrated value engineering (VE) process to maximize the value of the process. Integrate the VE process into project management meetings with the continuous target value analysis and documentation by means of a budget options log or equivalent tool. Complete final stage of the VE process. Work with the Owner and Architect to implement approved VE options.
- 17) Finalize scope, work plan, schedule and cost proposals for the GC/CM's preconstruction services.

B. CONSTRUCTION DOCUMENTS PHASE RESPONSIBILITIES

The GC/CM shall also provide the following services during the Construction Documents Phase.

- 1) Attend project management meetings with the Owner and Architect approximately every two (2) weeks to discuss the Project status and issues. Attend, as requested, specific design discipline meetings with the Owner and Architect for the purpose of reviewing and developing the design. Attend final design phase review meeting conducted by Owner. Attend one (1) School District Board of Directors business meeting.
- 2) Continue to evaluate and utilize the BIM model as an ongoing collaboration tool between the Owner, Design Team, and GC/CM. Update the target value portion of the cost model for each project management meeting.
- 3) Provide constructability comments and estimating services as requested by the Architect and approved by the Owner to evaluate specific critical elements of the design as they are formulated.
- 4) Verify that the Drawings reflect the existing Project site conditions.
- 5) Work with the Owner and Architect to develop and finalize phasing plans for the work as necessary.
- 6) Manage contracts for building engineering systems per RCW 39.04.290, if any.
- 7) Monitor the development of the Construction Documents. Identify changes to the approved design documents and update the cost saving item tracking system monthly for discussion at project management meetings. Verify that the Construction Documents reflect existing site conditions and improvements.
- 8) Upon receipt of the permit set of Drawings from the Architect, at approximately 50% Construction Documents, update the constructability review process and related activities, including issuance

of the required report. Monitor changes to documents for subcontractor bidding until documents are finalized. Verify that all review comments are addressed and incorporated into the final Construction Documents prior to subcontract bidding. Prepare the following deliverables:

- a) A 50% construction cost estimate for the entire estimated Cost of the Work in the format of the previously approved estimate as required by Section 2.1.5.2 of the A133 Agreement.
 - c) An updated Project schedule including a detailed construction schedule.
 - d) An update to the final site logistics plan.
- 9) Upon completion of the 50% estimate and under the oversight of any other estimators the Owner may retain, the GC/CM and the Architect shall reconcile their estimates and present to the Owner one estimate of the MACC based upon mutually agreed assumptions including: the date of commencement and duration of construction, escalation factors, design contingency, and Negotiated Support Services costs. The cost estimate shall reflect the Owner's and GC/CM's document review comments from previous phases to achieve a reconciliation. If the reconciled estimate exceeds the MACC, the GC/CM shall take whatever actions are necessary in conjunction with the Architect and Owner to reduce the Cost of the Work so that it is within the MACC.
- 10) When the Construction Documents of the Project are 50% complete, the GC/CM shall perform the following tasks and submit related documents to the Owner per the established schedule:
- a) A complete interdisciplinary quality assurance check to validate the level of completeness and coordination of the documents.
 - b) Finalize the constructability review process and related activities, including issuance of the final report.
- 11) Per Section 2.2 of the A133 Agreement, when Construction Documents are at least 50% complete the GC/CM shall:
- a) Update and present to the Owner an updated Project schedule to reflect changes that have occurred during design and provide an updated schedule for procurement of materials, subcontract buyout, and construction.
 - b) Prepare a detailed GMP estimate for the entire Work in the format of the previously approved cost estimate and negotiate, if possible, a final GMP and schedule. Work to solicit bids and to prepare for and conduct GMP/MACC negotiations is not a part of the Preconstruction Phase and will not be paid for by the Owner as part of Preconstruction Services.