

REQUEST FOR PROPOSALS for GC/CM SERVICES (RFP)
Educational Services Center (ESC) HVAC/ Lighting/ Roof Upgrades Project
Edmonds School District
Issued to Proposers on Short List
June 10, 2021

1. GENERAL

The following is provided as a portion of the Edmonds School District GC/CM procurement process to assist Proposers on the Short List in preparing for their Project discussion (aka “interview”) and submitting their Proposal.

1.1 Project Description:

The Edmonds School District has modified its approach to GC/CM based on lessons learned during past projects. The District is seeking a GC/CM to work collaboratively with the District and other members of the Project Team from the earliest stages of the Project to actively participate in developing the design and to suggest and implement process improvements. This approach includes having the GC/CM suggest how the District can be a better Owner. The District wants the GC/CM to be a full member of the team in the spirit of Integrated Project Delivery (IPD). The intent is to have a very open, collegial process from the start.

The Project will replace and upgrade systems for the District’s Educational Services Center (ESC), including Roof, Envelope, HVAC, and Lighting systems. The ESC is a two story, 57,400 SF purpose-built office building, constructed in 1991, located on five-acre site at 20420 68th Avenue West, Lynnwood, immediately south of Edmonds Community College. The facility houses most of the District’s central services, including: Administration, Student Learning, Student Services, Special Education; Diversity, Equity and Outreach; Business Services and Finance, Capital Projects, Communications, Facilities Operations, HR and Payroll, Food and Nutrition Services, and Technology.

The District staff and the retained design team, led by McGranahan Architects, have completed a feasibility study to upgrade or replace certain elements of the Educational Services Center. The estimated Guaranteed Maximum Price (GMP) for these improvements is approximately \$5.2 M. The District hopes to complete the construction work prior to the start of the 2022-23 school year. Additional project details appear in the Request for Qualifications (RFQ) for the Project.

The District is providing the following draft documents to shortlisted firms to supplement information provided in the RFQ:

- AIA 133 – Agreement Between Owner and Construction Manager
- A133 Attachment 3 - Description of Preconstruction Phase Services
- AIA 201 – General Conditions of the Contract for Construction
- Cost Responsibility Matrix
- Specifications, Divisions 0 and 1
- Original 1990 Educational Service Center Plans
- Plans for the 2002 Expansion to the Educational Services Center
- Aerial Photo of Site

1.2 Revised Project Schedule

Selected GC/CM Service Milestones	
August 4, 2021	Anticipate Issuing Notice to Proceed with Preconstruction Services
January 31, 2022	Anticipate Issuing Construction NTP – ESC System Upgrades
August 31, 2022	Substantial Completion - ESC System Upgrades
October 3, 2022	Final Completion

1.3 Revised Selection Schedule

The following are tentative targets:

GC/CM Selection Process	
Date	Activity
May 13, 2021	Advertise and Issue Request for Qualifications
June 7, 2021	Receive Statements of Qualifications and begin review
June 10, 2021	Announce shortlist and Issue Request For Proposals, including Agreement and General Conditions
June 16, 2021	Conduct interviews
June 24, 2021	Receive cost proposals; evaluate and identify highest rated firm
June 30, 2021	Receive design phase services fee proposal from recommended firm and submit recommendation for award to School Board
July 13, 2021	School Board decides on recommendation

2. FACE TO FACE PROJECT DISCUSSION (AKA, “INTERVIEWS”)

2.1 Meeting Schedule and Short-listed Firms:

The following firms have been chosen by the ESC Upgrades Project selection committee for a Project discussion and submission of Proposals:

Firm	Discussion Time
FORMA	8:00 AM
BNB	9:30 AM
Lydig	11:00 AM

The discussions will occur on June 16, 2021 via Zoom. All members of your presentation team will receive an email invitation for this event. You will need to give Nick Chou at the District the names and email addresses for all participants on your team no later than June 13, 2021. (email: choun@edmonds.wednet.edu ; mobile: (425) 508-9344)

The following individuals will be on the District’s interview team:

Nick Chou, Design and Construction Manager, CPO
 Andrew Greene, District Legal Counsel (Perkins Coie)
 Edward Peters, Capital Projects Office Director
 Michael Nelson, Construction Coordinator, CPO
 Taine Wilton, Design and Construction Manager, CPO

Dion Serra, Architect PM, McGranahan Architects
Josh Robischon, Mechanical Engineer (Metrix Engineers)

2.2 Meeting Format - Proposers should regard this discussion as the interactive kick-off meeting for the Project rather than a traditional interview presentation. The format, described in detail below, provides a total of 75 minutes for the discussion. Proposers are allowed 15 minutes at the beginning of the discussion to present their team and organization. The remaining 60 minutes will be an interactive conversation about the topics described below. The participants should be the individuals committed to the Project with whom the District and Architect will work. The selection panel wants to hear from and discuss the Project with the Project Manager, Superintendent, Cost Estimator and others with whom they will be working on a regular basis, including those having a major role in design/preconstruction services, e.g. the Project Manager and Cost Estimator, and the Construction phase, e.g. the Project Engineer. We want to understand what key individuals will be doing on the Project and what it is like to work with them. Proposers should work with Michael Nelson prior to the day of the interview to verify that presentation materials work properly on the District's Zoom platform.

2.3 Formal Team Introduction – As indicated above, each firm will be allowed up to 15 minutes to introduce their team. The District wants you to address the following two topics during this portion of the meeting:

Project Team, Organization, Roles and Responsibilities. Why and how are the individuals you propose right for this particular Project? What do the various titles of key team members mean, i.e., what will they be doing during the design and construction phases? Are you committed to using your proposed staffing on the ESC Upgrades Project? Under what circumstances might your proposed staffing change? What is the likelihood of changing or expanding your staffing during the design, preconstruction and construction phases?

Case Study – Present one project similar and directly applicable to the ESC Upgrades project. For example, you might describe a major school or college building upgrades project that involved complete systems replacements on a tight, occupied site with challenging phasing. What challenges did you help resolve and what innovations did you contribute to the success of the project? For example:

- How did you manage restricted parking and access?
- How did you ensure continued operation and uninterrupted critical services for the occupied building?
- What did you do that reduced costs or benefitted the schedule?
- How did you maintain a safe environment for both the construction site and the occupied building?
- What did you learn that will be helpful to the Project Team on the ESC Upgrades project?

While the focus here is on one case study, you may wish during the remainder of the discussion to have other recent project examples available to help demonstrate your experience and abilities as they relate to the ESC Upgrades project. We also may ask additional follow-up questions about your case study.

It is not necessary or desirable to use this time to explain the general qualifications and experience of your company and team. Presenting such information is likely to be counter-productive because it is already covered in your Statement of Qualifications. The panel will move into the next portion of the meeting after 15 minutes.

2.4 Project Discussion Topics – Consistent with making this meeting the kick-off for the Project, be prepared to have a full group dialogue on the following agenda items during the interview. This dialogue involving all of your team members will continue through the remainder of the Project.

- **GC/CM Services during the Preconstruction Phase**

In general, what will you do for the Project and how will you do it? Discuss the “Description of Preconstruction Phase Services,” which is Attachment 3 to the A133 Agreement. The panel is interested in any suggestions you may have for improving this phase of the Project and scope of work. In particular, how can we approximate Integrated Project Delivery?

How will you help the District resolve significant Project design challenges and opportunities, such as the following:

- Maximizing scope given a fixed budget
- Determining the best schedule
- Furniture impacts and coordination
- Phasing and impacts to ESC and maintenance staff during construction
- Working with the Authorities Having Jurisdiction (AHJs) and accommodating permitting delays

- **Cost Estimating and Control, Final Design Quality**

Please review the scope of work presented in the RFQ and the attached sample cost model. These are provided to indicate an approach we are considering, rather than final results, content or process. We want to discuss your opinion of this initial effort and how to use it as a tool throughout the process.

Do you have a better approach to cost analysis, estimating and reconciliation than what is described in Attachment 3 and the A133 Agreement?

How do you propose to evaluate the costs of early design options when many of the details and systems are still to be developed, e.g., how do you estimate what’s not on the drawings?

How can we obtain realistic cost estimates and constructability input for HVAC and other systems on a project that does not qualify for EC-MC/CM? Our experience is that Mechanical and Electrical contractors have become more reluctant to expend significant effort on such services in anticipation of a potential open bid?

How can we produce the best quality Construction Documents (CDs)?

How will you ensure that staff knowledge learned during design will be translated to the construction phase?

How can we make productive, specific use of BIM during the design phase while balancing cost and responsibility for the design?

- **Establishing the Guaranteed Maximum Price for this Project.**

How can we resolve the School District’s need for realistic cost commitments prior to commencement of construction with the GC/CM’s interest in reducing cost exposure risk by securing subcontractor bids before setting a GMP? How can the District minimize the risk to maintaining its GMP budget when approving “Mini-MACCs”?

Please comment on the approach to establishing the GMP presented in the A133 Agreement, including the following: definitions of Specified General Conditions and Negotiated Support Services, use of Allowances, and use of Contingency.

- **Subcontractor Bidding & Procurement.**

How will you involve the School District and Design Team in developing bid packages?

How can we improve and ensure MWBE firm participation?

What risks do you consider when structuring a bid package?

What do you consider “best efforts” in attempting to attract subcontractor bidders?

How will you create “responsibility” criteria for the subcontract bid packages?

What do you do with a troublesome low bidder?

- **Project Management**

How do you work with the District and Design Team during construction?

What items are an appropriate use of the MACC contingency and how do you decide what items to propose for such funding?

How do you decide which subcontractor requests to pass on to the School District and which to tell the subcontractor to make go away?

How do you manage District Staff and neighbor concerns?

How do you work with the Authorities Having Jurisdiction (AHJs)?

How do you manage the close-out process, including subcontractors and the continuity of your own personnel?

- **GC/CM Concerns**

Please comment on and ask questions about the proposed Contract Documents, including the revised A133 Agreement, the revised A201 General Conditions, Division 01, and cost responsibility allocations in the Cost Responsibility Matrix.

Please address any additional information you may have obtained from this RFP or your investigations after your response to the RFQ. Any other questions or comments are welcome.

3. PROPOSAL

3.1 Acknowledgments

3.1.1 In submitting a Proposal, the Proposer acknowledges that:

.1 It will provide, for the duration of the Project, all of the individuals on the team designated in its written response to the Request for Qualifications and will maintain continuity of staffing throughout the life of the Project.

.2 It has taken steps reasonably necessary to ascertain the nature and location of the Work, and it has investigated and satisfied itself to the general and local conditions which can affect the Work or its cost.

.3 The drawings included with this Request for Proposals are for information only, and will not be used for construction.

.4 It has familiarized itself with any ongoing or anticipated construction in the neighborhood of the Project and anticipated pedestrian and traffic congestion, limited parking, lane and street restrictions and closures and the requirement that the work be coordinated with ongoing operations.

.5 The Proposal is based upon a schedule and assumptions that incorporate these conditions and the requirements of the Contract Documents.

3.1.2 Should a Proposer find discrepancies or omissions in the RFP documents, or should Proposer be in doubt as to the meaning of any document, the Proposer must at once notify the District. If appropriate, the District will send written instructions to all short-listed Proposers by addenda.

3.1.3 So that responses can be communicated to all Proposers, submit questions concerning this RFP in writing to Edward Peters, Capital Projects Director, Edmonds School District, no later than 4:00 PM on June 14, 2021. Ed's e-mail address is: peterse@edmonds.wednet.edu. His mobile phone number is: (206) 999-6820.

3.2 Preparation of Proposals for Project

3.2.1 First: Three important Proposal figures are to be submitted on the Proposal Form included with this RFP:

- A percentage for the "Percent Fee."
- A fixed, lump-sum amount, as indicated, for the "Specified General Conditions Work." (The terms "Fee" and "Specified General Conditions" are defined in the GC/CM Agreement attached to this RFP.) Note, compensation for services during the Design and Preconstruction Phases is not applicable to the Proposal amounts requested above.
- A monthly general conditions rate in the event that the Construction Phase exceeds seven (7) months for reasons that are the District's responsibility.

3.2.2 The following instructions apply to preparing a responsive Proposal.

.1 Use the supplied Proposal form. Where so indicated on the Proposal form, sums should be identified in both words and figures; in the event of a discrepancy between the two, the amount written in figures will govern and the words will be considered to resolve any ambiguity in the figures.

.2 State the proposed Percent Fee as a percentage, based upon an estimated total Cost of the Work which includes the anticipated cost of subcontractor work, Specified General Conditions, the Negotiated Support Services and a Contingency of five percent (5%). Note: In the GC/CM Agreement, the cost of builder's risk insurance is to be included in the Percent Fee. For the purpose of submitting the Proposal Form, however, proposers should assume that the cost of builder's risk insurance will be 0.5% of the Cost of the Work. (Thus, this percentage should be included in the Percent Fee.) If the actual cost of builder's risk insurance is different (higher or lower than 0.5%), as validated by the District

via actual cost records and audit if needed, the Percent Fee will be adjusted by change order once builder's risk insurance is purchased.

3. Enter a dollar amount for the Specified General Conditions assuming an approximate 4-month construction schedule. There may be an opportunity for up to three months of off-site work under a limited notice to proceed prior to the commencement of on-site construction. Enter a Monthly Rate for SGCs for up to six additional months of SGCs. (This monthly rate will be multiplied by six and added to the lump sum Specified General Conditions cost for purposes of selecting a GC/CM.)

.4 The Fee and Specified General Conditions include all taxes imposed by law except Washington State Sales Tax that will be due on progress payments. Do not include such sales tax in the Proposal.

.5 Type or clearly print the Proposer's business name, address, other contact information, Contractor's Registration Number, UBI Number, and Employment Security Department number in the spaces provided.

.6 An authorized representative of the Proposer must sign the Proposal Form.

.7 Acknowledge receipt of all addenda by identifying the addendum number in the space provided in the Proposal Form.

.8 Make no other entries, modifications, or qualifications to the Proposal Form. The District reserves the right to reject any or all Proposals and to waive as an informality any non-material irregularities in the Proposal Forms received.

3.3 Submission and Withdrawal of Proposals

3.3.1 Proposals must be submitted in sealed envelopes or packages no later than **1:00 PM on June 24, 2021**, to the District at the main reception desk at the Edmonds School District Educational Services Center, 20420 68th Avenue West, Lynnwood, WA 98036. Address the Proposal to the District, to the attention of Edward Peters, Capital Projects Office, and include on the sealed envelope the Project name, Proposal submittal deadline date and time, and the name and address of the Proposer.

3.3.2 Receipt of Proposals or modifications by facsimile, e-mail, telephone, or orally will not be considered.

3.3.3 The District will publicly open all sealed cost Proposals at 2:00 PM on June 24, 2021, socially distanced, in the front parking lot of the Edmonds School District Educational Services Center, 20420 68th Avenue West, Lynnwood, WA 98036.

3.3.4 A Proposer may withdraw its Proposal by submitting a written request to the address noted in Section 3.3.1 above, or via e-mail, prior to the date and time set for opening the sealed cost Proposals.

3.3.5 Any Proposal or modification received after the deadline set forth in Section 3.3.1 may not be considered. Any request for withdrawal of a Proposal received after the deadline set forth in Section 3.3.3 may not be considered. The time of receipt at the office designated in this RFP is the time/date

stamped or printed by District on the Proposal envelope or package or other documentary evidence of receipt maintained by District.

3.4 Final Selection

Final selection of a GC/CM for Preconstruction Services and GMP negotiations will be made consistent with the requirements set forth in the Request for Qualifications as supplemented by this RFP. The District will provide final qualifications scoring to all shortlisted firms at the time it opens the sealed cost Proposals. The twenty (20) points allocated for cost Proposals will be awarded on the following basis:

- The Owner will multiply the Percent Fee submitted with each cost Proposal by the estimated Cost of the Work to determine a calculated fee total for the purposes of the Proposal.
- The calculated fee total will be added to the submitted amount for Specified General Conditions to determine a total Proposal amount. The SGCs will be calculated by adding the lump sum SGC price anticipated for the Project to the calculated SGC price for an additional six months.
- Twenty (20) points will be assigned to the lowest Proposal amount. Points will be assigned to other Proposals by determining the percentage difference between the proposer and the lowest proposed amount. (This will be determined by taking the lowest proposed amount divided by the proposed amount of the proposer, times twenty.)

3.5 Protest Procedures

3.5.1 A Proposer protesting for any reason the District's GC/CM selection or any other aspect arising from or related to this RFP, must submit a written protest to the District within four business days of the event giving rise to the protest and, in any event, no later than four business days after the District's announcement of the highest ranked Proposer. (Intermediate Saturdays, Sundays and legal holidays are not counted as business days.) The written protest must include the name of the protesting Proposer, a detailed description of the specific factual and legal grounds for the protest, copies of all supporting documents, and the specific relief requested.

The written protest must be delivered in person to the address below and sent simultaneously via email to peterse@edmonds.wednet.edu.

Edward J. Peters
Capital Projects Director
Edmonds School District
Educational Services Center
20420 68th Avenue West
Lynnwood, WA 98036-7400

3.5.2 Decision on Protest - The District will consider all written protests submitted in accordance with the protest procedures set forth above. The District may provide any other Proposer(s) the opportunity to respond in writing to the protest. If the protest is not resolved by mutual agreement of the protesting Proposer and the District, the District will review the issue(s) raised in the protest and furnish a final and binding written decision to the protestor and any other affected Proposer within six business days of the District's receipt of the protest. If more than one protest is filed, the District's decision will be provided within six business days of the District's receipt of the last protest. If no reply is received from the District during this six business day period, the protest will be deemed rejected.

3.5.3 Waiver - Failure to comply with the protest procedures set forth herein will render the protest waived.

3.5.4 Condition Precedent - Timely and proper compliance with and exhaustion of these protest procedures will be a condition precedent to any otherwise permissible judicial consideration of a protest.

4. After Selection

4.1 Within five (5) business days of notification of its selection for preconstruction services and GMP negotiations, the selected GC/CM will be required to submit a Preconstruction Phase Work Plan (“Work Plan”) in accordance with the Agreement between the District and GC/CM.

4.2 The Work Plan shall be formatted to include: 1) a schedule of the activities included in the scope of work, 2) the anticipated number of hours needed to complete each activity, and 3) the name(s) of the individuals who will be used to complete each task and an hourly rate for each individual the GC/CM intends to use to accomplish the tasks assigned. The hourly rates multiplied by the number of hours needed to complete all tasks shall, unless adjusted pursuant to mutual agreement of the District and GC/CM, constitute the total compensation for Preconstruction Services. The Work Plan shall be consistent with the preliminary work plan presented in the interview or modified with approval of the District thereafter.

4.3 If the Work Plan is satisfactory, the District will advise the GC/CM and submit the Contract in the form contained in the RFP for the GC/CM's execution following School Board approval.

4.4 If the Work Plan is not satisfactory, the District will advise the GC/CM of the shortcomings in the Work Plan. The GC/CM will not be entitled to any compensation until a Work Plan, satisfactory to the District, is provided and the Contract is executed. Failure to submit an acceptable, initial Work Plan within the required time period may result in the District canceling the GC/CM's selection. The District may then, at its discretion, begin discussions with the next highest ranked Proposer.

END OF RFP

PROPOSAL FORM
Educational Services Center (ESC) HVAC/Lighting/Roofing Upgrades Project

TO: Edmonds School District, Attn.: Edward J. Peters
 20420 68th Avenue West
 Lynnwood, Washington 98036

The undersigned submits the following Proposal:

Pursuant to and in compliance with the Request for Proposal, the undersigned, having carefully examined the Contract Documents and conditions affecting the Work, and being familiar with the site, proposes to furnish all labor, materials, equipment and services necessary to complete the Work, as follows:

- 1. Construction Manager's Percent Fee (percentage assuming a total estimated Cost of the Work of (\$5,200,000):**

_____ %

- 2. Lump sum Specified General Conditions for an anticipated 4-month Construction Phase:**

_____ Dollars (\$_____).

Monthly rate for SGCs for up to six additional months. (The monthly rate will be multiplied by six and added to the lump sum Specified General Conditions amount proposed above for purposes of selection.)

\$_____ per month.

ADDENDA

Receipt of **RFP** Addenda numbered _____ is hereby acknowledged.

 Legal Name of Proposer

 (Name of Person with Actual Authority – Proposer's Representative)

 Title of Person with Actual Authority

 Signature of Person with Actual Authority, on Proposer's behalf

 Date Signed

Federal Tax Identification Number	Dept. of Labor & Industries Registration No.
Contractor's Washington Registration No.	Washington State Dept. of Revenue No. (UBI)