

GC/CM Services for Educational Services Center (ESC) HVAC, Lighting, and Roof
Upgrades Project
Request for Qualifications
Edmonds School District
May 14, 2021

1. Request for Qualifications - GC/CM Services

The Edmonds School District is requesting Statements of Qualifications to provide General Contractor/Construction Manager services for Educational Services Center (ESC) HVAC, Lighting and Roof Upgrades Project. Statements of Qualifications are due at Noon on June 7, 2021. You can see the RFQ on the District website:

(https://www.edmonds.wednet.edu/departments/capital_projects)

or call Sharon James, CPO Support Technician, (425) 431-7163. Please check the District website frequently for Addenda to the RFQ which will be published only on this website.

2. Project Description and Background Information

Project Background and Goals

The intent of this project is to 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.

Approximately 200 employees are assigned to the ESC. It operates, at least partially, year-round, including school board meetings and various training and community functions during non-business hours. Some functions have a reduced presence in July. The facility must remain in operation during the construction of the proposed improvements, although there may be some opportunities to relocate some functions via work-from-home or other options.

With the exception of a 4,463 SF addition in 2003 the ESC is largely as-built thirty plus years ago. Its systems are obsolete and at the end of their useful service life. For example, it uses T-12 lighting fixtures for most areas. There are roof leaks and the HVAC system does not function satisfactorily.

Funding for ESC systems upgrades is a technology and capital projects levy measure approved by voters on February 11, 2020. The estimated Guaranteed Maximum Price (GMP) is approximately \$5.5 M. The District hopes to begin construction in late February/early March 2022 and achieve Substantial Completion by mid-August 2022.

Project Scope

The District contracted with McGranahan Architects to design the project. Their team includes Metrix Engineers for mechanical systems and Travis Fitzmaurice Wartelle Balangue Engineers, Inc., for electrical systems. The team has completed a conceptual design analysis, including alternatives investigations, which is the basis for scope, budget and schedule.

The following are brief descriptions of existing conditions and the conceptual design for major scope elements. The project will include some upgrades to AV systems and other additional elements to be determined during final design to support project goals. The District will provide shortlisted firms access to digital plan and specifications archives for the existing building.

HVAC

Existing HVAC System

The existing HVAC system is original to the building construction and consists of a variable air volume system with packaged rooftop equipment. Two natural gas fired boilers supply hydronic heating water throughout facility. Rooftop air handling units with hydronic heating coils and DX cooling provide primary air to parallel fan powered terminals units with heating coils and squeeze boxes located above the ceilings of the zones served. The HVAC system includes a direct digital control system.

New HVAC System

The new system will be a high efficiency variable air volume system with new packaged rooftop equipment. Two condensing gas fired boilers will supply low temperature heating water throughout the facility. Rooftop air handling units with heat recovery, hydronic heating and DX cooling will provide primary air to series fan powered terminal units with heating coils located above the ceilings of the zones served. In order to further improve occupant comfort, the quantity of zone terminal units will be increased and existing linear slot diffusers replaced with conventional supply air mixing devices. A new building automation system will provide HVAC system controls.

Lighting

Existing Lighting System

The existing building lighting consists of fluorescent lighting fixtures with limited controls. The systems are not energy efficient.

Existing Fixtures Types are as follows:

- a) Open Office: Recessed 2 x 4 Lithonia Optimax
- b) Office/Conference: Recessed 2 x 4 Lithonia Optimax
- c) Entry: Wall Wash and pendant/downlight

- d) Board Rooms: Lithonia Optimax and downlight
- e) Storage Rooms: Wraparound
- f) Restrooms: Misc Fluorescent recessed and wraparound
- g) Stairs: Wall Sconces and downlights

New Lighting System

The existing lighting will be replaced with higher efficiency LED fixtures, which surpass current Washington State Energy Code for installed wattage.

New fixtures will be as follows:

- a) Recessed: Lithonia Optimax: LED retrofit kits – Existing fixture body remains
- b) Recessed: Downlights: LED retrofit kits
- c) Wall Sconces: New LED wall sconce
- d) Wall Washers: New LED wall washer
- e) Strips/Wraparounds: LED retrofit kits
- f) Special Fixtures: New LED fixtures

The existing lighting controls will remain. A few select areas will receive upgraded controls to allow for dimming

Roof

Existing Roof System

30+ years old 3-Ply Built-Up Roof, over rigid insulation over steel decking.

New Roof System

Single-ply (EPDM, PVC, TPO) system applied over new protection board over existing roofing to remain, plus cricketing and drainage improvements as necessary. Also, new parapet coping and flashing associated with new roof top mechanical units & equipment.

Owner, Architect and Contractor Roles: Integrated Project Delivery

The District will be implementing “GC/CM 3.0” on this project to approximate Integrated Project Delivery (IPD). The District has selected the Design Team for the ESC upgrades and will expect both the GC/CM and the Design Team to work collaboratively through all phases.

Project Schedule and Activity Constraints –

- Construction on a tight, occupied site housing essential District-wide services
- Scarcity of interim sites for ESC functions, including parking
- Land use entitlements and permitting
- Design phases and reviews
- Construction start and duration

3. Project Schedule and Selected GC/CM Service Milestone

The following are tentative targets.

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

4. GC/CM Services and Issues

4.1 Introduction - The GC/CM services to be provided during the design (and BEFORE construction begins) are as critical to the School District as those during construction. The School District is seeking a collaborative partner for the entire design and construction process. The School District anticipates that the use of the GC/CM process during the design phase will allow the District to obtain critical contractor insight on value engineering, constructability, phasing, sequencing, and other logistical challenges as these issues relate to schedule, cost, and site logistics.

The majority of the work on this project is mechanical and electrical construction. Although the Edmonds School District has used MC-EC/CM on some previous projects, this project does not meet the statutory dollar limits for the MC-EC/CM approach. Our experience with MC-EC/CM is that the Owner can maximize value by involving the MC-EC/CM in Schematic Design or earlier. For the ESC Upgrades Project we are seeking a GC/CM who can help us realize similar benefits while using statutorily approved methods to procuring mechanical and electrical work. It is equally important that the GC/CM's process involve the owner throughout to maximize both quality and budgetary goals.

More subtle, but equally important, is the value received through improved communication between the Owner, A/E team, and GC/CM given that their relationship begins early in the life of the project. The GC/CM's contributions can be best achieved by its commitment of expertise via their staffing plan. The School District expects that the overall constructability and permanency of the facility will be improved when the GC/CMs utilize highly qualified staff who are also allowed to participate early and often with top-level people in the Owner's organization and to weigh in on constructability issues and value analysis issues as they arise. Additionally, the District anticipates that the use of a GC/CM affords this project the opportunity for the GC/CM to secure the interest and availability of highly qualified sub-contractors.

During the construction phase, the School District expects the GC/CM to provide a high level of project management, including supervision and coordination, scheduling, cost control, quality control, and safety. Potentially overlapping design and construction phases add to the need for continuity of the GC/CM's project manager and other key staff.

4.2 Schedule/Phasing – Two paramount goals of the District are:

- completing the upgrades to improve functionality, durability, energy efficiency, and user comfort; and,
- keeping the existing District Central Office functions fully operational and safe during construction. It may be necessary to relocate some ESC functions temporarily, but there are no obvious and easy ways to do this.

Traffic in and around the vicinity of the site will need good management and advance planning by the GC/CM. With early involvement of the GC/CM, these variables can be addressed, while at the same time allowing the GC/CM to plan its own staging and delivery requirements.

There are several scheduling/phasing complexities:

- How can we maintain parent, student, staff and community access to ESC functions during construction?
- How can we guarantee uninterrupted functionality of District-wide services, e.g. voice and data communications, payroll, purchasing, etc.?
- How can we schedule related work, e.g. roof-top equipment installation and roofing replacement cost effectively while minimizing disruption of ESC functions?
- How can we maintain adequate total parking capacity, and access to the ESC loading dock during construction, or provide viable, cost-effective alternatives?
- How can we minimize noise and fugitive dust impacts during construction?

The District expects the GC/CM to work with the District and the Design Team prior to construction to develop a schedule and construction plan that will resolve these issues.

4.3 Design Phase, Cost Estimating, Value Engineering and Constructability The site usage, coordination, and scheduling complexities mentioned above have obvious impacts on developing the design and feasibility. These are examples of the types of issues the GC/CM will be expected to address while conducting cost-estimating and design reviews during the design phase.

The GC/CM will be an active participant in cost estimating throughout the design phase. The District's cost-estimating consultant will provide thorough cost analysis throughout the project. The consultant will meet and collaborate with the GC/CM's cost estimator to develop common estimating definitions, conventions and presentation formats.

On some early GC/CM projects, the District used the traditional method of reconciling independent cost estimates by the GC/CM and the Architect's cost estimators at each design phase. The District, Architect and GC/CM then reviewed and approved the reconciliations. On more recent projects, the District has been successful in applying a "Continuous Target Value" approach. The team de-emphasized phase estimates and reconciliation by reviewing cost implications of the on-going design on a regular and frequent basis. We are interested in improving this process and learning whether alternative approaches to cost analysis and control during design might be preferable. Any owner references proposing firms can supply on this topic will be especially helpful in understanding alternative approaches.

The GC/CM will also be an active participant in reviewing the ongoing design for value analysis and constructability. For value analysis, the District is looking for the GC/CM to identify opportunities to meet specific project goals and objectives most cost effectively without compromising other values such as design quality. Similarly, the District wants the GC/CM to provide constructability reviews that will maintain desired levels of quality, minimize changes to the Work, and keep the project on schedule and within budget.

4.4 Construction Phase Risk – Beyond the obvious benefit of obtaining a contractor’s opinion of cost early is the value of focusing on minimizing construction phase risks for all parties. For example, phasing and scheduling challenges might create the perception of greater subcontractor risk during buy-out, which would be reflected in their bids. The School District anticipates that the GC/CM method can produce both a real and perceived reduction of that risk and, thus, a fiscal benefit. Real reduction in risk on this project should result from the GC/CM’s involvement in traffic and safety management, utilities and related features, packaging subcontract work, and preparation of a workable staging plan and schedule. Prior to bidding the various sub-contracts, the GC/CM will be expected to suggest approaches to handling perceived risks.

4.5 Technical environment – It is the intent of the District that the selected GC/CM will be able to make beneficial use of the design team’s building information model (BIM) during the pre-construction process. While specific uses have not yet been defined, the GC/CM will be expected to suggest beneficial uses of the model. Some uses may include quality assurance coordination, materials quantities verification, and expedited shop drawing and early fabrication/delivery packages. The District is also interested in how the GC/CM’s use of technology, such as 360° cameras and other techniques, during the design and construction phases will enhance the processes and contribute to its efficiency.

4.6 Bidding and Construction Phase Responsibilities – The GC/CM’s responsibilities will be described in the Agreement and related Division 00 and 01 contract documents, which will be provided to shortlisted firms with the Request for Proposals (RFP). These documents will include the AIA’s standard forms A-133 (2009), A-201 (2007), revised to comply with Washington State law and School District policies and procedures. The following are some of the key construction phase service issues for this project:

- Bid packaging/Subcontracting plan
- Subcontractor pre-qualification and bidding
- Outreach to minority and women-owned businesses, small business entities, and disadvantaged business entities.
- Ability to meet GMP and GMP Cost Control
- Ability to Control Schedule
- Compliance with Apprenticeship requirements
- Safety
- Quality Control and Testing
- Management of sub-contractors
- Project Closeout
- Operation and Maintenance Manuals and training

5. SOQ Submittal Process

Statements of Qualifications are due no later than Noon on June 7, 2021, to Edward J. Peters, ALEP, Capital Projects Director, at the Edmonds School District Educational Services Center, 20420 68th Avenue West, Lynnwood, WA, 98036-7400. FAX or electronic submittals are not allowed. Firms must submit eight copies of their SOQ. If you have questions, please call Nick Chou, Design and Construction Manager, (425) 431-7161 or e-mail him at, choun@edmonds.wednet.edu.

6. SOQ Contents & Selection Criteria

Statements of Qualifications must be limited to no more than 30 typed pages 8 ½ by 11 inch (no less than 11 point type), excluding, cover letter, resumes and project data sheets. Please include the email address and phone number of your firm's principal contact for this selection in the cover letter. The selection committee commits to reading up to thirty pages of material that responds to the criteria listed below. SOQs must respond directly to each of the following criteria in the order presented below.

Firm

1. **Understanding of Project Issues and Concept of GC/CM Services**
(Weighting: 5%) – Discuss the process the firm will implement to address the issues presented in Section 4 above and any other issues that will be critical to the success of the project.
2. **Firm Qualifications** (Weighting: 5%) –Provide a brief description of the history and capabilities of the firm. Describe the types of projects or services the firm normally performs and the relative dollar value of each. Specify the firm's proximity to the project location. If the firm is a joint venture, describe its members and structure and indicate the projects and services that reflect the efforts of individual members and other projects successfully completed by the members.
3. **Past Performance of the Firm in negotiated and complex projects**
(Weighting: 10%) - List the experience that the firm has had in completing GC/CM or similar projects, e.g., negotiated or Guaranteed Maximum Price. Provide a list of at least five (5) similar and completed projects in Washington State. For each project, provide a project description, the duration of construction, the final cost, a description of the Design Phase (AKA Pre-construction) Services performed, an owner reference (with telephone number) who is familiar with your firm's performance in completing the project, and note the individuals named in your proposed Project team who participated on the project team for the listed project. Also list for each project: 1) owner's original estimate; 2) original total contract cost (GMP); 3) final actual contract cost; 4) original substantial completion date; and 5) actual date of substantial completion. Indicate if any claims or major disputes were filed on the project, and if so, describe. If your firm has not completed five (5) GC/CM projects in Washington, then list projects you believe were successfully completed using a similar CM/GC, negotiated, or guaranteed maximum price format.

4. **Recent, current and projected workload of the firm** (Weighting: 5%) - Specify your firm's annual volume (in dollars) of construction for the past five (5) years, the anticipated volume for the current year and the planned volume for the next two (2) years. Discuss how your firm's participation in this project would affect that plan. Provide the firm's bonding capacity and address the ability of the firm to bond this project. List the name, contact person and telephone number the firm's bonding agent. Note: Short-listed firms may be required to supply commitment statements from their bonding agent and/or financial statements as part of the RFP process.
5. **Accident Prevention Program** (Weighting: 5%) - Describe your firm's approach to project safety and worker health. Provide information for a period of the past three (3) years indicating 1) the number of deaths, 2) the number of lost worker days due to accidents, and 3) the number of recorded OSHA incidents.

Proposed Team

6. **Organization, Capability, Commitment and Continuity of Proposed Team** (Weighting: 15%) – Discuss the roles of each key team member. Discuss any assignments that will be made later and the capability of the firm to cover those positions. Provide an organization chart showing role and percent commitment during each phase for each team member. Discuss your team's ability to comply with the proposed schedule through all phases of the project, including design, and how you plan to do so.
7. **Team Experience and Qualifications** (Weighting: 20%) – Provide resumes of qualifications and related experience of each committed staff member, including role and approximate duration. Provide at least three owner or architect references for each committed team member, including the last project on which the committed team member worked. Related experience should include K-12 educational facilities or related project types, experience with phased school or similar projects, experience on occupied school and office sites, experience with other publicly bid projects, experience with GC/CM, negotiated Bid or GMP work; experience related to other issues specific to this project. You may wish to use a matrix to summarize team experience.

Firm and Proposed Team

8. **Ability and Approach to Providing Design Phase (Pre-construction) Services** (Weighting: 15%) – Discuss and provide evidence of the proposed team's expertise and record of success providing the following pre-construction phase services. Describe how your firm would monitor and ensure that Owner's program scope is maximized and the Owner's construction budget and project schedule are met at every phase of Design and Contract Documents development.
 - The District wants to get specific mechanical and electrical input as early in the design process as possible, given statutory and logistical constraints.
 - Cost estimating – cost-tracking, developing common format with other parties, reconciling GC/CM's estimates with architects and owners, providing for escalation and market factors, providing Design and MACC Negotiated Support Services budgeting.

- Scheduling – Making recommendations for change and advising long-lead procurement packages to ensure the project schedule. Recommending phasing and sequencing of work to minimize impacts to ESC operations. Examples of phasing and sequencing, and other related project scheduling issues.
- Site-Investigations and logistics - Investigation of existing conditions to ensure the construction documents will reflect the actual site conditions.
- Design Document Review - Providing Design and Construction Document coordination comments, tracking and verifying their implementation.
- Value Analysis – Proposing ideas and assessing alternative construction options, products and engineering systems for cost savings and life cycle cost design considerations.
- Constructability - Relevant examples of constructability proposals that reduced changes to the Cost of the Work.
- Subcontract Plan - Subcontract Plan preparation and procurement planning.
- Collaborative Participation – Examples of successful cooperation with Owners and Architects, continuity of staff through the course of a similar project.

9. **Ability and Approach to Providing Bidding and Construction Phase Services** (Weighting: 15%) - Discuss and provide evidence of the proposed team’s expertise and record of success providing the following construction phase services. Describe how your firm would monitor and ensure that Owner’s program scope is maximized and the Owner’s construction budget and project schedule are met during construction.

- Bid packaging strategy, timing and contents.
- Scope of work firm proposes to self perform and ability to perform that work.
- Ability to meet GMP and cost control during construction.
- Ability to control schedule.
- Safety.
- Coordination and quality control results.
- Use of technology during construction
- Ability to address and resolve unexpected challenges.

10. **MWBE** (Weighting: 5%) – Describe your plan for outreach to minority and women-owned businesses, small business entities, and disadvantaged business entities. Describe past performance in similar outreach.

7. Selection Schedule and process

The following are tentative targets:

GC/CM Selection Process	
Date	Activity
May14, 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 conceptual design phase services fee proposal from recommended firm and Submit recommendation for award to School Board
July 13, 2021	School Board decides on recommendation

The District selection panel for this project will include the following members:

- 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 & Associates
- Josh Robischon, Mechanical Engineer (Metrix Engineers)

The District selection panel for this project may include other individuals.

Members of the selection panel will review properly submitted Statements of Qualifications (SOQs) and rate them using the criteria and weighting listed above. The District will create and announce a short list of firms to be evaluated for further consideration. Shortlisted firms will be provided with a Request for Proposal (RFP) including, interview instructions, and instructions for submitting a cost proposal, along with other written materials (e.g. pre-construction work plan and schedule), and the AIA standard forms A-133 and A-201, as revised for this project, and related Division 00 and 01 documents. Sealed cost proposals will be due from all parties after the interviews and will be opened in public after the interviews.

The District selection panel will conduct interviews in accordance with the instructions provided. After the interviews, the selection panel will rate the firms using the selection criteria and weighting listed in the RFQ for 80% of the selection, based on all the information presented. Soon after, sealed cost proposals will be received and reviewed for the remaining 20% of the calculation.

Members of the selection panel will meet with the firm to be recommended for selection and finalize the Design Phase (pre-construction) services fee. District staff will recommend selection and award of the Design Phase (pre-construction) agreement at a regular school district Board of Directors business meeting. Upon receiving School Board approval, District staff will issue a notice of award and upon receipt of a properly executed agreement issue a notice to proceed with pre-construction services. The Agreement and General Conditions will be provided to shortlisted firms.