GC/CM Services for Oak Heights Elementary School Replacement Project
Request for Qualifications
Edmonds School District
October 28, 2019

1. Request for Qualifications - GC/CM Services

The Edmonds School District is requesting Statements of Qualifications to provide General Contractor/Construction Manager services for its replacement of Oak Heights Elementary School. Statements of Qualifications are due at Noon on November 18, 2019. There will be an optional project information meeting on Monday, November 4, 2019, at Noon in Board Room B, Educational Services Center, 20420 68th Ave West, Lynnwood. 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

Background
The Edmonds School District is presenting a $600 million bond measure to its voters on February 11, 2020. The project in this RFQ is part of the larger District Master Plan to improve educational outcomes and relieve current overcrowding at the elementary level. The District will be issuing RFQs for GC/CM services for two additional projects in the near future. There is more information at the following site:

https://www.edmonds.wednet.edu/community/2020_capital__technology_levy___construction_bond/2020_capital_construction_bond

This bond measure would fund a wide variety of projects, and allocates $61.6 million for Total Project Cost for replacing Oak Heights Elementary. The estimated Guaranteed Maximum Price (GMP) is $38.5 million. It also allocates $66 million for completing a new Elementary School immediately South of Lynnwood High School at District property known as Site 28. The Site 28 Elementary School Project will be the subject of a separate GC/CM selection process that will overlap this selection. The District will present more information about this second GC/CM selection at the optional project information meeting on November 4.

Similarities in timing, scope, and desired contracting method among these two projects have lead the District to combine the Architect selection process for these two Elementary projects, although we expect to hire two different Architecture firms. The full scope of Architect and GC/CM services the District will commission for these two projects will depend in part upon the outcome of the February 11, 2020 election.

Oak Heights Elementary School Replacement – The District intends to construct entirely new K-5 elementary level facilities for a 550 student capacity school and create the best feasible site layout. Oak Heights is a currently operating school and current staff, parents and students and community will be involved in the process. The District intends to replace the new Oak Heights Elementary on the same site as the existing
school. The school may remain in operation at the existing site until the new facility is available or may move to an interim site, possibly former Alderwood Middle School.

The design for the Oak Heights Replacement will be informed by recent District experience with new Elementary and K-8 Schools, and will reflect the District’s proposed move to K-5 grade configuration for elementary schools, and commitment to continuous improvement in educational program delivery. Snohomish County will be the principal permitting agency for both projects.

The Oak Heights project is eligible for OSPI School Construction Assistance funding as a New-In-Lieu of Modernization (N/L) project for only the existing square footage, and the District plans to front-fund the entire project. The Architect will assist the District with the D-Form process.

**Common Factors** - As mentioned above, there are some significant similarities among the Oak Heights and New Elementary at Site 28 projects. The District intends to use the General Contractor/Construction Manager (GC/CM) procurement approach for both projects, and hire the GC/CM at the same time as the Design Team so that the entire Design and Construction Team can work collaboratively from the earliest stages of the project. The District proposes hiring a separate GC/CM for each of these two projects.

The District will be implementing “GC/CM 3.0” on these projects to approximate Integrated Project Delivery (IPD). Another guide for the process will be the Association for Learning Environments (A4LE) seven core competencies required for their Accredited Learning Environment Planner (ALEP) designation. The District also intends to use research from the cognitive sciences and environmental psychology to inform how the built environment can support and enhance learning, e.g. “Welcome to Your World: How the Built Environment Shapes Our Lives,” by Sarah Williams Goldhagen.

The District has conducted conceptual planning and cost-estimating for both of these projects. They will have the same student capacity and approximately the same building area. District staff, assisted by a Civil Engineer, tested the feasibility of both projects by creating a site specific 3-D model of a structure having sufficient area to meet program needs, and of major site improvements. These feasibility studies are NOT designs and the actual design may be completely different. They are the basis for a complete, detailed cost estimate by spec. section, prepared by WT Partnership. These cost-estimates will be the starting point for a target value analysis approach to cost-control during design.

Project Schedule and Activity Constraints - The District plans to open the Oak Heights Elementary Replacement to students in September, 2022 and to open the New elementary at Site 28 in September, 2023. These dates may be adjusted. The selected GC/CM team will work with the District to review and refine the schedules. The following are some key scheduling issues:

- District enrollment growth over the course of the 2020 Bond program
- Re-boundary planning and implementation of the District’s NE Quadrant, which includes both projects
- Planning and implementation of the District’s grade reconfiguration for Elementary and Middle Schools
- Availability of Interim sites for Oak Heights and other projects
- Land use entitlements and permitting
- Programming and conceptual design
- Design phases and reviews
- Construction start and duration

**Summary of Current Oak Heights Elementary School Site and Facilities**

Address: 15500 18th Ave. W, Lynnwood, WA  
Site Size: 9.4 Acres  
Building Size: 49,355 SF (2014 Study and Survey) plus Six relocatable classrooms  
Current Headcount Enrollment (Grades K-6): 621 (September, 2019)

3. **Project Schedule and Selected GC/CM Service Milestone**

The following are tentative targets.

<table>
<thead>
<tr>
<th>Selected GC/CM Service Milestones</th>
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<tbody>
<tr>
<td>January 14, 2020</td>
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<tr>
<td>February 11, 2020</td>
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<td>May, 2021</td>
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<td>June, 2021</td>
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<td>June 2021</td>
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<td>June 15, 2022</td>
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<td>September 2022</td>
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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 District will be evaluating, and seeks GC/CM input on, the use of Mechanical and Electrical Contractor Construction Management (MC-EC/CM). 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.

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 opening the new facility on the schedule that best serves educational and operational needs, and keeping the existing site safe during construction.

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:

- What are the trade-offs between keeping the school on-site and moving it to an interim location, assuming one is available?
- Is there any merit to adjusting the schedules for Oak Heights and the anticipated New Elementary at Site 28? Could the New Elementary serve as an interim site for Oak Heights?
- If the school remains on site, how can safe pedestrian and vehicle access and parking be maintained during construction?
- If the school remains on site, could the portables remain? If not, how would we accommodate the six classrooms?
- If the school remains on site, what options remain for play space?
- How would staying on site affect schedule and what would the cost impacts be (i.e. full time flagger, restricted site access, barrier walls, etc.)?

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, such as how storm-water will be managed during construction. Exploration and study of existing conditions and improvements including underground utility systems and underground injection controls by the GC/CM would facilitate the design of the most cost-effective civil package. 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. 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. The GC/CM will assist the team with the submittal of these tasks to the OSPI D Form process.

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.

This project will comply with the Washington Sustainable Schools Protocol (WSSP) and will continue the District’s commitment to improving instructional technology and energy efficiency. Our experience with several recent projects is that these commitments require the use of new technologies that can have unexpected impacts on the design, construction and user satisfaction. Having the GC/CM’s perspective on these products and systems prior to the construction phase will help mitigate these impacts during construction by allowing better coordination and detailing during design.
The School District is interested in bid packaging and other techniques to improve the quality of construction especially for high performance elements such as the building envelope, HVAC systems and storm water systems.

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.
- Possible use of Mechanical and Electrical Contractor Construction Management (MC-EC/CM)
- 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
- 1/2 percent for art
- Project Closeout
- Operation and Maintenance Manuals and training

5. SOQ Submittal Process

Statements of Qualifications are due no later than Noon on Tuesday, November 18, 2019, to Edward J. Peters, 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.

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 resumes and project data sheets. 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 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.

- 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 school 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. Assessing and recommending site logistics requirements. Protection of wetlands and Wildlife habitat.
- Value Analysis – Proposing ideas and assessing alternative construction options, products and engineering systems for cost savings and life cycle cost design considerations. Relevant examples of VE proposals that met owner’s goals and objectives while reducing construction costs and meeting State OSPI D-form process requirements.
- 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. **W/MBE** (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:

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
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<tbody>
<tr>
<td>October 28, 2019</td>
<td>Advertise and Issue Request for Qualifications</td>
</tr>
<tr>
<td>November 4, 2019</td>
<td>Optional Informational Meeting, Noon @ ESC</td>
</tr>
<tr>
<td>November 18, 2019</td>
<td>Receive Statements of Qualifications and begin review</td>
</tr>
<tr>
<td>November 22, 2019</td>
<td>Announce shortlist and Issue Request For Proposals, including Agreement and General Conditions</td>
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<tr>
<td>December 3, 2019</td>
<td>Conduct interviews</td>
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<tr>
<td>December 9, 2019</td>
<td>Receive cost proposals; Evaluate and identify highest rated firm</td>
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<tr>
<td>December 20, 2019</td>
<td>Receive pre-construction services fee proposal from recommended firm</td>
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<tr>
<td>January 6, 2020</td>
<td>Submit recommendation for award to School Board</td>
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<tr>
<td>January 14, 2020</td>
<td>School Board decides on recommendation</td>
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The District selection panel for this project will include the following members:

**District Staff**
- Edward Peters, Capital Projects Office Director
- Nick Chou, Capital Projects Office Project Manager
- Taine Wilton, Capital Projects Office Project Manager

**Consultants**
- Andrew Greene, District Legal Counsel (Perkins Coie)

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.

Appendix:

**Project Delivery Method Checklist and Recommendation**

**Capital Projects Office**

Approved by Edmonds School District Board of Directors, October 22, 2019

**Project Name:** Oak Heights Elementary School Replacement  
**Address:** 15500 18th Ave West, Lynnwood, WA  
**Project Manager:** TBD  
**Architect:** TBD

**Scope of work outline:** Replace existing Oak Heights Elementary facilities on the same site. The completed facilities will be approximately 75,000 square feet. The existing facilities built in 1967 have exceeded their useful service life and do not meet contemporary functional/educational standards.

**Proposed schedule** (include any special constraints): The construction schedule will depend on several factors, including completing a re-boundary plan for the entire NE quad, the construction schedule for the New Elementary at Site 28 (near Lynnwood HS), the completion of Spruce Elementary Replacement Phase 2 and the availability of an interim site. These issues will not be resolved until late in the design process at the earliest. Construction could start in the Winter/Spring of 2021 and substantial completion could be in Spring of 2022, to allow the school to move-in over the Summer. Demolition of the existing school could occur during Summer of 2022, prior to school start in September, 2022. In the current replacement concept Oak Heights staff and students could occupy the site during construction, but we will be evaluating options for moving them to an interim site. Because involving the GC/CM in the design phase is a
principal value of this delivery method, we would like to complete the selection process and give the GC/CM notice to proceed with service during design no later than early January 2020.

Total project budget: $61.6M million

Proposed Budget Guaranteed Maximum Price for construction only: $38.5 million

Internal Project Review Questions are as follows (RCW 39.10.340) (Underline):
   (1) Implementation of the project involves complex scheduling, phasing, or coordination; Yes or No
   (2) The project involves construction at an occupied facility which must continue to operate during construction; Yes or No
   (3) The involvement of the General Contractor/Construction Manager during the design stage is critical to the success of the project; Yes or No
   (4) The project encompasses a complex or technical work environment; Yes or No
   (5) The project requires specialized work on a building that has historic significance; Yes or No
   (6) The project is, and the public body elects to procure the project as, a heavy civil construction project. Yes or No

Project Manager delivery method recommendation (Underline): GC/CM, DBB

Brief explanation:
In accordance with RCW 39.10.340, a project proposed for the GC/CM delivery method must meet at least one of the six criteria listed in the “Internal Project Review Questions” section above. The Oak Heights Elementary School Replacement project meets four of these criteria.
   • The schedule for the Oak Heights Elementary School Replacement project interconnects with multiple commitments the Edmonds School District has made for its 2020 bond.
   • The project may involve construction on an occupied site, due to factors that will not be determined until the design process is nearly complete. These factors include completing a re-boundary plan for the entire NE quad, the construction schedule for the New Elementary at Site 28 (near Lynnwood HS), the completion of Spruce Elementary Replacement Phase 2 and the availability of an interim site.
   • Involvement of the GC/CM during the design stage is critical to the success of the project because of the numerous and interconnected value, constructability, schedule and cost issues to be resolved. Experience on previous projects has taught us that we can best achieve our educational learning goals for the project by involving the contractor in the earliest stages of design. The GC/CM procurement method allows us to maximize the quality of the learning environment.
   • High performance systems for building envelope, HVAC, and storm water along with energy efficiency and sustainability are goals for the project. These systems all pose complex and technical work environment challenges and require careful coordination by the GC/CM. This project will be evaluated for use of the Mechanical Contractor/Construction Manager and Electrical Contractor/Construction Manager (MC/CM & EC/CM) procurement methods.

Project Manager delivery method recommendation (Underline): GC/CM, DBB