

PROPOSAL INSTRUCTIONS AND TERMS CONDITIONS FOR REQUEST FOR PROPOSALS FOR ARCHITECT & ENGINEER SERVICES AT THE URBANDALE COMMUNITY SCHOOL DISTRICT

INTRODUCTION AND BACKGROUND

The Urbandale Community School District is located in Polk County, within metropolitan Des Moines, Iowa. To create equity within the District, it is being proposed that two (2) four section elementary school buildings be constructed on the sites occupied by Olmsted Elementary School, and Valerius Elementary School. The projected enrollment for the two new buildings is 2500.

The District has invested in capital improvements in the past several years with no direct cost to local taxpayers through leveraging available financing pathways. Over the past year, the District completed a Quantified Learning Environment Outcomes process that pointed to the need for the district to direct more aggressive updates to the district's elementary infrastructure. A citizen's leadership committee recommended the construction of two (2) four section elementary schools that would house the students currently in Jensen, Olmsted, Rolling Green, and Valerius Elementary schools. Anticipated completion of all buildings is 2025.

As the district has no additional buildings to serve as transitional attendance center during the construction of the new buildings, building construction will be phased so each building is constructed separately.

SCOPE OF SERVICE ANTICIPATED NEEDS

The District is embarking on a capital project with a desired public vote as early as February 2018 but no later than September 2018. The scope of the work and development process will remain straightforward and pragmatic due to the aggressive timeline, culture of the community, anticipated financial size of \$59 million, and identified needs. The anticipated work will impact 4 elementary buildings. The District is looking for a partner in crafting a long-range capital improvement plan while executing a streamlined, efficient, and cost-effective immediate capital project referendum within the next 6 months. The architect & engineering services may be offered through a full service firm or in collaboration among firms. The District is looking for a stable, consistent, and experienced team to actively advise and, collaborate with the selected construction management firm, and co-facilitate with District representatives during all phases of the capital project (pre- referendum, pre-construction, bid and procurement, construction, and post-construction.)

SCOPE OF POTENTIAL CAPITAL PROJECT COMPONENTS

The following represent potential components for the next capital project as identified in the 2017 Quantified Learning Environment Outcomes assessment completed by BLDD Architects & Engineers, as well as internal review of operational and instructional needs. Within the QLEO alone, the needs of the

district are monetized to include design, construction, and incidental expenses which sum total \$59,000,000.00. Therefore the approach for identifying capital project components will remain straight forward, pragmatic, and streamlined to ensure that the next capital project meets our operational and instructional needs within the limited budget scope afforded in the debt service schedule. A final list with more recent estimates for construction costs will be developed during the pre-referendum phase in fall 2017.

East Elementary School

- Multi (2) Level, 4 section Buildings
- Adequate parking, play areas and greenspaces
- 21st Century learning spaces

Central Elementary School

- Multi (2) Level, 4 section Buildings
- Adequate parking, play areas and greenspaces
- 21st Century learning spaces

It is expected that the design of each building will be similar to the other.

ANTICIPATED CAPITAL PROJECT TIMELINE

The anticipated project schedule and key milestone dates are:

Board of Education Approval of Architect & Engineer	September 25, 2017
Preliminary Project Scope & Planning	October 2nd, 2017
Board of Education Approval of Capital Project Resolution	October 23, 2017
Public Capital Project Vote	February 13, 2018 [Tentative]
Bid Process	February, 2019 (pending passage of referendum)
Construction	Spring, 2019

ARCHITECT & ENGINEERING SERVICES OUTLINE

The selected architect & engineering firm(s) are to coordinate and manage the capital project by playing an active role in the District's Project Team, consisting of architect/engineering firm, construction manager, superintendent, central office administrators, and district building and grounds manager.

For contract purposes, the Owner anticipates using an Owner modified AIA Document B132-2009 contract for architect & engineer services. This document is to be used as a guide for defining services to

be provided by the Architect/Engineer Firm. The following is an outline of those services – it is not meant to be all inclusive.

The Architect & Engineering firm(s), will, or in some instances assist, the construction manager to:

- develop schedules;
- analyze project construction estimates;
- propose & evaluate alternative designs;
- analyze cost models;
- understand labor conditions;
- advise the most appropriate construction techniques and implementation strategies;
- provide value engineering and life cycle costing;
- coordinate and communicate the activities of the Project Team through all phases of the project;
- Present formal information to Board of Education & various other groups as needed;

More specifically, but not comprehensively, the following provides a guide for the various design phase service:

Pre-referendum/Schematic Design Phase

- Identify key project activities in a schedule
- Assist construction manager to complete review QLEO and Building Assessments to determine up-to- date facility evaluations
- Assist the District in defining parameters of project to assure that programming needs and budgetary constraints are aligned
- Develop schematic site & floor plans for review
- Prepare sketches and rational for buildings
- Provide conceptual and schematic estimates as a tool to guide decisions
- Provide budgets for preliminary designs that include incidental costs
- Provide support and documentation for BOE approval and voter referendum
- Attend public meetings to help District explain sketches, schematic designs, floor plans and cost estimates.

Design Development Phase

- Complete detailed preliminary design site plan and floor plans
- Update preliminary cost estimates as needed
- Update and determine master scheduling
- Recommend value engineering
- Monitor, confer, and advise cash flow analysis
- Collaborate with construction manager for construction logistics planning
- Provide support and document for BOE as needed

Pre-Construction/Bidding Phase

- Complete Construction Documents for bidding, including a detailed set of site, floor, structural, electrical, mechanical plans and specifications for bidding/construction purposes
- Secure approval from all jurisdictions of authority
- Collaborate with construction manager to complete a final cost estimate for project
- Work with Construction Manager to facilitate bid process, including preparation of notice to bidders and notice of public hearing, attending pre-bid conference to answer bidder questions, prepare necessary bid addendums, attend public hearing and board meeting where contract is awarded.
- Assist the District in resolving bid irregularities.
- Analyze and evaluate bid proposals and make recommendation, in conjunction with the construction manager, regarding the lowest responsive, responsible bidder.

Construction Phase

- Facilitate submittals and approval process within coordinated planning matrix of responsibilities, including but not limited to, change orders, pay applications, substitution requests, etc.
- Respond, as needed, to RFI's and provide implementation advisement
- On-site monitoring, reviews of as-built drawings, managing of punch list
- Continually evaluate project quality and progress for compliance with the Contract Documents and recommend appropriate actions to maintain schedule, if necessary
- Participate in progress meetings and prepare status reports as needed
- Evaluation and verify substantial completion

- Evaluate punch list items.
- Carry out such other requirements consistent with competent and responsible construction duties and procedures or as required by the District.

Post-Construction Phase

- Coordinate the Owner's occupancy requirements
- Coordinate all close out documentation
- Submit a breakdown of the actual cost incurred
- Ensure final transfer of all digital documents to District
- Advise the Owner on Chapter 573 claims submitted
- Make recommendations on final acceptance and retainage withholding in accordance with Chapter 26 and Chapter 573.
- Assist in start-up/commission work, as reasonably requested.

PROPOSAL FORMAT

Submissions should be in the form a simple, straight-forward business letter responding to the following items requested. NO binders and marketing materials are required or expected. If successful, you will find the Urbandale CSD has a culture which honors individuals' time, talent, and treasure. We are pragmatic, direct, and seeking a partner who will engage in open, honest, and transparent communication. Again, please note that a standard business letter responding to the items below is all that is expected and required.

1. Brief Company Profile – name of firm, size of firm, type of firm, relevant firm background, name of team leader and members being assigned if this RFP is successful, location of the office from which the work on this project is to be performed. Clarification, as needed, if architect & engineering services are provided through a single full-service firm, or in partnership among specialized firms.
2. Experience – include details of experience with similar projects of size, complexity, and aggressive timelines, indicators of accuracy of project budgets & cost estimates in previous school construction projects, experience rating with on time completions of school construction projects, history of change orders expressed as a percentage of the project budget [excluding incidentals] in new work and renovation work, together with the general nature of such change orders, and demonstrated ability to optimize efficiencies
3. Reference – list five (5) references of past and present clients who may be contacted.
4. Specific Project Approach – provide details regarding any specific value-added or unlisted referendum, design/development, preconstruction, and construction phase and post-construction services your firm offers and the approach your firm would use to achieve owner's objectives. Please

focus on the ways you perceive your firm to be different than the market place of A/E services and most importantly how your firm can meet the needs of Urbandale CSD.

5. Proposed Staff – provide the proposed team organization and identify key personnel including the project manager and field superintendent (or similar roles). Please include resumes for all key staff, outlining their roles on similar projects.

6. Clarifying Commitment & Shared Purpose – please review the specific project needs, anticipated scope, and aggressive timeline to ensure that you are able to partner successfully moving forward. As the proposed timelines and scope indicate, the successful firm will need to commit to mobilizing a team immediately upon approval and working diligently through the next 6 months to bring a capital project referendum to vote in February 2018 (tentative). Submission of your RFP for consideration will acknowledge your willingness and capacity to participate in the timelines and activities described. Briefly articulate how your firm, specifically the proposed staff will be able to make Urbandale CSD a priority to ensure successful and timely implementation of the capital project.

7. Fees for Services – please indicate all relevant and specific fees for Architect & Engineering Services potentially rendered in the type of capital project proposed.

PROPOSAL EVALUATION CRITERIA

Proposals will be evaluated and scored on the basis of the following criteria:

1. Brief Company Profile (5 Points)

Consideration will be given to proposals that are able to mobilize, sustain, and complete the proposed capital project in the timeframe specified.

2. Experience (15 Points)

Consideration will be given to proposers demonstrating strong capabilities, experience and reputation in undertakings similar to those described in this RFP. Similar experience will be understood to include development of capital projects with similar scope, complexity, and timelines.

3. Reference (10 Points)

Consideration will be given to those proposers who are highly and sincerely recommended by past and present clients who may be contacted.

4. Specific Project Approach (20 Points)

Consideration will be given to the soundness, pragmatic, and sensible strategies and techniques proposed for adding value to achieve the District's objectives. The ability to customize and meet the level of support the District needs moving forward will be evaluated.

5. Proposed Staff (25 Points)

Consideration will be given to the quality, availability, and track record of the proposed team organization and identified key personnel.

6. Clarifying Commitment & Shared Purpose (10 Points)

Preference will be given to proposals demonstrating an ability to carry out the tasks and responsibilities outlined in the proposal within a project team, including a construction manager.

7. Fees for Services (15 Points)

Consideration will be given to proposals that promote fiscal responsibility within the District's budget and are within market pricing standards.

TERMS & CONDITIONS

1. The District is not liable for costs incurred in the preparation of this submission and any other subsequent submissions or presentations.
2. Any proposal may be withdrawn or modified by written request of the proposer, provided such request is received by the District within the date and time set for receipt of proposals.
3. The contents of the successful firm's proposal may become part of the contractual obligations if deemed appropriate by the District.
4. The District intends to award a contract on the basis of the best interest and advantage to the district, and reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with all qualified proposers or to cancel this RFP in part or in its entirety, if it is in the best interest of the District to do so.
5. The successful Architect & Engineering firm shall not discriminate against any individual in accordance with applicable federal, state, or local laws.
6. Any contract that may follow this RFP shall be subject to review and approval by District legal counsel and the Board of Directors. Acceptance or selection of a firm from this RFP process does not mean an approved and binding contract will ultimately follow for the services described herein.