

Request for Proposal

Lease Crutcher Lewis
EMU Renovation and Expansion
University of Oregon

August 16, 2013
Lewis Project No. PR11641
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I. INTRODUCTION

Lease Crutcher Lewis, LLC, serving as the Construction Manager/General Contractor (CM/GC) for the University of Oregon is soliciting **proposals from qualified Mechanical/Plumbing and Electrical Subcontractors** for the preconstruction services and construction of the EMU Renovation and Addition in Eugene, Oregon. Terms and conditions of the proposal are outlined in Lease Crutcher Lewis, LLC (CM/GC) "Request for Proposal", dated August 16, 2013, attached to and made a part of the Contract Documents.

Proposals will be received at the offices of Lease Crutcher Lewis, LLC, (CM/GC), 550 SW 12th Avenue, Portland, Oregon 97205, until 1:00 PDT, September 4, 2013 at which time the proposals will be privately opened. Proposals shall be clearly marked "UO EMU". Two (2) original copies and One (1) digital copy (flash drive) of the Proposal are required.

Lewis intends to enter into a contract with the selected firms for work that will initially include Preconstruction Phase Services only, for the scope of work. There are provisions for adding Construction Phase Services at the sole discretion of Lewis through acceptance of a Guaranteed Maximum Price (GMP) by contract amendment.

Lewis, in partnership with UO and SERA, will evaluate each Proposal with respect to the evaluation criteria outlined in section VIII of this RFP. At its sole discretion, Lewis may elect to short list and interview finalists in order to more fully understand the relative qualifications.

This RFP does not commit Lewis to enter into any agreement, to pay any expenses incurred in preparation of any response to this request, or to procure or contract for any supplies, goods or services. Lewis reserves the right to accept or reject any or all proposals not in compliance with the RFP or if it is in the public interest to do so.

A mandatory pre-bid conference for Mechanical/Plumbing and Electrical Subcontractors will be held at the Lease Crutcher Lewis office, 550 SW 12th Avenue, Portland, OR 97205, on Monday, August 26, 2013 at 3:30 pm.

In accordance with Oregon Administrative Rule (OAR) 580-063-0020, Lewis will use the request for proposals (RFP) competitive procurement process to select and enter into a Contract with a Mechanical and an Electrical firm.

Lewis and the rest of the University of Oregon's EMU project team recognize the stringent requirements and complexities for the design and construction of this project and therefore are interested in selecting the contractor representing a 100% integrated team approach. We look forward to hearing from you shortly. If you have any questions please feel free to call Mark Butler at (503) 223-0500.

II. PROJECT SCOPE, SCHEDULE AND BUDGET

The project consists of renovation of large portion of the existing building and new construction of a three story student union building. The total gross square footage is approximately 80,000 SF of new construction and 130,000 SF of Renovation. The project site is located at the center of the University of Oregon campus, on the corner of 13th Avenue and University Street in Eugene, OR. It is anticipated the project will be a phased, fast track construction project. Some specifics of the design and construction sequence are as follows:

- Full MEP design by SERA/Glumac
- Early Phase of Construction includes 8,000 sf. renovation to create a new Craft Center in the basement of the 1950's era building starting January 1st, 2014.
- Overall Projection Duration expected to be January 2014 through May 2016.

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- Partially occupied building throughout construction
- LEED silver equivalency project at a minimum.
- Fast track design and permitting process

The preliminary schedule for the design and construction is as follows:

- | | |
|---------------------------------------|-------------------------|
| - Schematic Design | Complete |
| - MEP RFP & Preconstruction Selection | September 12, 2013 |
| - 50% Design Development Estimate | September 27, 2013 |
| - 100% Design Development Estimate | November 29, 2013 |
| - Craft Center Bid Package Pricing | December 19, 2013 |
| - Craft Center Construction | January 2014 – May 2014 |
| - Demo Bid Package | March 2014 |
| - 50% CD Estimate | April 24, 2014 |
| - New Building Bid Packages | May 28, 2014 |
| - Building Construction | Aug 2014 – May 2016 |
| - Renovation Bid Packages | August 1, 2014 |
| - Project Completion | May 2016 |

The total building construction cost is project to be approximately \$68 Million.

III. FORM OF AGREEMENT

Lewis will use our standard Subcontract Agreement form, attached as Exhibit F, as the basis for the final agreement. In addition, the subcontractor agrees to be bound to "Contractor" by the terms and conditions set forth in the Contract documents, including but not limited to The Construction Contract between The Oregon Board of Higher Education and LEWIS (available upon request). In addition, the subcontractor agrees to be bound by the contents and response of this RFP including Instructions to all Bidders and the Trade Interface Agreement (Exhibits C and G). **All Subcontractors must meet Lewis' standard subcontractor insurance requirements (Exhibit H).**

It is the intent of Lewis to enter into a subcontract with the selected Mechanical and Electrical Subcontractors. The initial scope of the subcontract will be limited to Preconstruction Phase Services for all of the work described in Part IV of the Request for Proposal. At Lewis' sole discretion; there are provisions for adding Construction Phase services through acceptance of a Guaranteed Maximum Price (GMP) by contract amendment.

Acceptance or rejection of the final construction documents phase construction cost estimate will constitute completion of Preconstruction Phase Services. If Construction Phase Services are added through acceptance of a GMP, an amendment to the subcontract will be executed. At the Owners and Lewis' discretion, a 100% Performance Bond may be required.

If it is determined not to continue this subcontract beyond the completion of Preconstruction Phase Services, the subcontractor's compensation shall be limited to the Preconstruction Phase Services maximum not-to-exceed fee stated in the Subcontract.

All proposers must comply with the following requirements; BOLI Prevailing Wage Law, ORS 279.350, be licensed with the Construction Contractors Board, ORS 671.530 and resident status, ORS 279.029.

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IV. SCOPE OF PRECONSTRUCTION PHASE SERVICES

Preconstruction Phase Services will be provide under the terms of this Contract and paid for on a cost-reimbursement basis with an established maximum not-to-exceed limit up to \$5000 for the Mechanical/Plumbing Subcontractor selected and \$4,000 for the Electrical Subcontractor selected. Costs incurred above this that are required to meet the stipulated preconstruction services shall be taken out of Fee, addressed in construction cost of work or absorbed by the selected subcontractor. The selected subcontractors shall perform the following Preconstruction Phase Services:

- Design Development Estimate and Constructability Review
- 50% CD Estimate and Constructability Review
- Preconstruction MEP coordination in conjunction with the Design Team
- 100% CD Estimate (potential basis of GMP Contract)
- Attend up to two (2) preconstruction meetings per month for 6 months. Meetings may be held in Eugene and/or Portland. All travel and time required to attend these meetings shall be included in the preconstruction cost reimbursement stated above.

V. SCOPE OF CONSTRUCTION PHASE SERVICES

If the Subcontract agreement is amended to include Construction Phase Service, those services will generally be provided under the terms of the attached sample General Conditions and Instruction to Bidders. These elements will be revised prior to final estimate and contract negotiations.

VI. SELECTION PROCEDURE AND TIMETABLE

Under this RFP, the selection procedure is intended to evaluate the capabilities of interested Mechanical and Electrical Subcontractors to provide services to Lewis and the University of Oregon for this project. Proposals will be evaluated by the selection committee in accordance with the criteria listed below. The subcontractors will be selected based on the overall merit of its proposal, using the criteria described in Section VIII and the information obtained from references, interviews (if any), any other reliable source.

Estimated timetable for the RFP process:

August 16, 2013	RFP Advertisement
August 26, 2013 (3:30 PM)	Mandatory Pre-Proposal Conference
Sept. 4, 2013 (1:00 PM)	Proposal Submittal Deadline
Sept. 5, 2013 through Sept. 12, 2013	Proposal Review and Interview (if any)
Sept. 13, 2013	Subcontractor Selection / Notification

VII. SUBMITTAL AND INTERVIEW INFORMATION

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If Interviews are used for the selection of subcontractors, the format of the interview will be left up to the proposing subcontractors; however, they will be supplied with a list of topics that must be incorporated into the presentation and questions by the selection committee should be anticipated. Interviews will not typically exceed one hour. Members of the Proposer's proposed on-site project management team must be present at the interview.

All Questions and Comments regarding this RFP or the Selection process should be directed to:

Mark Butler, Project Manager

Telephone: (503) 223-0500
Facsimile: (503) 223-0500

VIII. INSTRUCTIONS TO PROPOSERS AND CRITERIA

Proposals Must:

- 1) Follow the format outlined below and be signed by an officer or principal with the authority to contractually bind the firm.
- 2) Be contained in a document not to exceed twelve (12) single-sided or (6) double sided pages including whatever pictures, charts, graphs, tables, and test the firm deems appropriate to be part of the review of the firm's qualifications. A separate transmittal letter, front and back covers, and blank section/numerical dividers will not be counted in the page limit. Sample Estimate requested in section 2 is exempt from this limit. Resumes of key individuals proposed to be involved in this project are also exempted from this limit. Page size is limited to 8 ½ x 11 inches, with basic test information no smaller than 12-point type. The proposer must follow the format defined below. The combined sections need to be clearly defined on the divider tabs so the reviewers can easily find the information.
- 3) The scoring breakdown for the proposals is as follows:

SECTION 1 – QUALIFICATIONS: 25PTS

- Discussion of your firm's ability and approach to meet the project schedule requirements for budget refinement and construction
- Proposed construction team (resumes and references). Key personnel will be committed to the project by contract specifically including PM, Foreman and Estimator.
- References for similar work involving proposed team members. This should be organized as an executive summary of your team's experience in renovations and higher education projects.
- List of similar higher education projects with a total construction value of over \$30+million completed in the past 5 years. Specifically indicate projects in which you provide preconstruction services.
- Corporate and team member's experienced working within City of Eugene jurisdictional authority.

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- How your firm will address procurement and construction of any of the trades not performed by your firm in-house (i.e. HVAC controls, sheetmetal, Tel/Data, etc.) *University of Oregon and Lease Crutcher Lewis will require competitive pricing of work performed by sub-tier subcontractors and for major equipment purchases that are part of your Guaranteed Maximum Price for this project.*

SECTION 2 – PRECONSTRUCTION SERVICES: 30 PTS

- Explain and provide examples of your BIM 3D modeling capability and experience specifically with REVIT and navis works software (specify current version being used for coordination in-house) including clash detection software and capabilities.
- Provide a SAMPLE detailed estimate from a similar job from the DD or early CD phase of preconstruction. – This does not count in the page count limitations.
- How would your firm assist in energy efficient goals for the project. How would your company participate in system selection and validation with the Mechanical Engineers.
- The section is available for each Proposer to address ideas, processes, strategies, etc. that could benefit the development of the project, such as options analysis and value engineering.

SECTION 3 – FEE REQUIREMENTS: 15PTS

- **Provide fee for construction as a percentage of the actual Cost of the Work** (which includes all reimbursable costs, including subtier subs and suppliers). The Cost of the Work and the Construction Fee will comprise the GMP. (**$GMP = FEE \% \times Actual\ Cost\ of\ Work$**) Please reference the attached Reimbursable Costs of Work / Fee Matrix (Exhibit B).
 - Note that any change orders, if necessary, after GMP is established will be marked up using the prescriptive allowable markups (15%Labor, 10%Material, 10% Equipment and 5% Subtier Subcontracts) as detailed by OUS Contract.
 - Note that for items such as safety and tools, compensation will be based on actual costs instead of general percentage markups for these items.
- **Provide your labor rates** for any and all anticipated reimbursable crew member classifications. Rates shall include all fringes and labor burden costs, and shall become the basis for substantiated billings against the GMP.
- **Provide your Burden rate** including taxes, insurance, health, vacation, bonus, PTO, etc.
- **Provide your Insurance rate.**
- **Provide your Bond rate.**

SECTION 3 – GENERAL CONDITIONS: 5PTS

- Provide General Conditions costs for construction services as indicated in the General Conditions column on attached Exhibit B. These costs will form the basis for the General Conditions as part of the GMP.

SECTION 4 – PERFORMANCE REQUIREMENTS: 25PTS

As part of this section, proposers shall describe how they will address the following items. Your written proposal should also affirm your ability to satisfy these requirements:

- Procurement of long lead equipment and other elements necessary to comply with the schedule. Meet or exceed all schedule milestones in both preconstruction and construction.

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- Produce budgets in form satisfactory to Lease Crutcher Lewis, SERA, Glumac and University of Oregon. We anticipate (2) budget iterations prior to design completion.
- Addressing LEED and SEED issues
- Address Local and MWESB subtier subcontractor and vendor participation. Please describe process and how you plan to address any participation goals the project or your company has for MWESB involvement.
- Substantiated GMP – Open book including invoices and substantiated labor quantities with the labor rates identified above.
- Work closely with Lewis, SERA and Glumac and other design members to provide feedback on design packages in relation to permit submissions, procurement issues, and value engineering through balance of design phase.
- Establish a satisfactory GMP prior to design completion.
- Maintain GMP estimate through project completion without additional change orders and increased costs.
- Contractor must provide for a minimum of three supplier bids for all major equipment and materials where possible. Review of all bids will be conducted by Lease Crutcher Lewis, Glumac, and University of Oregon.
- Participate in preconstruction design meetings, as requested.
- Provide updated Revit drawings and disk reflecting accurate as-built information for Owner's records at completion of project on CADD.
- Meet all of the requirements of the Construction Document
- Provide complete O&M manuals, bound and divided according to Specification, and O&M training for Owner's facility personnel.
- Provide substantiated monthly billings upon request of Contractor.

IX. PROTESTS

Any proposer who responds to this request for proposal and claims to have been adversely affected or aggrieved by the selection process shall have five calendar days after notification of the selected subcontractor to submit a written protest to: Bart D. Ricketts, Lease Crutcher Lewis, LLC (CM/GC), 550 SW 12th Avenue, Portland, OR 97205. This written notification is to be received by 5:00 P.M. within the identified five-calendar-day period.

X. PROPRIETARY INFORMATION

Lewis will retain the RFP and one copy of each original response received, together with copies of all documents pertaining to ward of a contract. These documents will be made a part of a file or record, which will be open to the public after responder selection and award, is announced. If a response contains any information that is considered a trade secret under ORS 192.501(2), mark each sheet of such information with the following legend: "this data constitutes a trade secret under ORS 192.501(2), and must not be disclosed except in accordance with the Oregon Public Records Law, ORS Chapter 192."

Fees and Labor rates will be publicly available regardless of any designation to the contrary.

XI. ENCLOSURES

The following exhibits are included in this RFP:

Exhibit A: Advertisement for Bid

Exhibit B: Direct Cost / Fee Matrix

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Exhibit C: Instructions to Proposers.

Exhibit D: Sample Invitation to Bid for Mechanical / Plumbing Scope

Exhibit E: Sample Invitation to Bid for Electrical Scope

Exhibit F: Reference Sample Lewis Subcontract. Comply will all requirements

Exhibit G: Sample Trade Interface Agreement. Comply with all requirements

Exhibit H: Standard Lewis Insurance requirements. Comply with all requirements.

Exhibit I: Preliminary Master Schedule

Exhibit J: July 1, 2013 BOLI Prevailing Wage Rates.