

REQUEST FOR PROPOSAL

CAMPUS STUDENT HOUSING PROJECT
30 July, 2001

PLANNING OFFICE
Western Oregon University
Monmouth, Oregon 97361

TABLE OF CONTENTS

- I** INTRODUCTION
- II** PROJECT DESCRIPTION
- III** DESIGN TEAM
- IV** BUDGET
- V** CONTRACTOR SELECTION PROCESS
- VI** CONTRACTOR SELECTION SCHEDULE
- VII** SCOPE OF SERVICES
- VIII** INSTRUCTIONS TO RESPONDENTS
- IX** PROPOSAL EVALUATION
- X** PROPRIETARY INFORMATION
- XI** PROTESTS
- XII** SUBMITTAL AND INTERVIEW INFORMATION
- XIII** CONTACT INFORMATION
- XIV** APPENDICES

I INTRODUCTION

Western Oregon University (WOU) intends to select a Construction Manager/General Contractor (CM/GC) for the Campus Student Housing Project (Project) from among those firms that respond to this RFP. It is the intention of WOU to enter into a contract with the selected CM/GC which will include a Preconstruction Services Fee (cost reimbursement in a maximum amount) for Preconstruction Services up through acceptance of a Guaranteed Maximum Price (GMP) for all work through construction and completion of the Project.

WOU will utilize the RFP process to obtain information to enable the selection of the most qualified CM/GC firm through evaluation of; A) The proposer's response to questions contained in this document; B) Information obtained during an interview with the Project RFP committee (for the highest rated proposals only); and C) The results of discussions with former and present clients of proposers. When selected, the CM/GC will work with a team composed of WOU, Mahlum Architects, and other Project consultants.

If WOU does not come to agreement on a GMP for the entire Project with the selected CM/GC, WOU reserves the right to terminate the CM/GC Contract in order to enter into a Contract with one of the other finalists.

This RFP shall not commit WOU to enter into any agreement, to pay any expenses incurred in preparation of any response to this RFP, or to procure or contract for any supplies, goods, or services. WOU reserves the right to accept or reject any and all responses received as a result of this RFP if it is in the best interest of WOU to do so.

II PROJECT DESCRIPTION

The proposed Project will be a new housing complex located on the north edge of campus west of the University Park Classrooms. This new development will be a combination of approximately thirty family style apartment units and a complex of dormitory suites accommodating 200 undergraduates. The apartments will typically be traditional two bedroom units constructed in multiple unit buildings. The dormitory suites will provide individual sleep/study rooms which share a common bathroom and kitchenette. Each suite will have its own exterior entry. Laundry rooms will be provided as required to serve the entire dormitory complex.

The scope of work for this Project will cover all site preparation and improvements, including landscaping, irrigation, parking, etc. The facilities must be ready for occupancy by fall term of 2002.

WOU is seeking contractors with recent experience in housing construction of similar size and scope that can meet the criteria and schedule of this Project.

III DESIGN TEAM

The primary members of the design team are:

ARCHITECT

Mahlum Architects
1231 NW Hoyt
Suite 102
Portland, OR 97209

LANDSCAPE ARCHITECT

Cameron, McCarthy Gilbert & Scheibe
160 E Broadway
Eugene, OR 97401

CIVIL ENGINEER

KPFF Consulting Engineers
111 SW Fifth Ave. Suite 2500
Portland, OR 97204-3626

CIVIL CONSULTANT

Boatwright Engineering, Inc.
2613 12th St SE
Salem, OR 97302

STRUCTURAL ENGINEER

James G Pierson Inc.
320 SW Stark St, Suite 535
Portland, OR 97204

MECHANICAL & ELECTRICAL

Interface Engineering, Inc.
6542 SE Lake Rd
Milwaukie, OR 97222

IV BUDGET

The estimated direct construction budget for this Project is between \$7.5 to \$8.2 million. In addition to the new facilities, this figure includes site preparation, infrastructure, parking, landscaping, irrigation and other necessary site improvements. It also covers the entire GMP, including Preconstruction Services, Estimated Cost of the Work and CM/GC fee. It does not include A&E fees, furniture and equipment, owner's contingency and other "soft costs" associated with the Project.

V CONTRACTOR SELECTION PROCESS

Beginning with this RFP, the selection process is intended to evaluate the qualifications and capabilities of interested CM/GC firms to provide construction management services to WOU for this Project. The responses to this RFP will be evaluated by a selection committee made up in part by the campus Planning Coordinator, the Housing Director, the Project Architect and other WOU staff and design team members. A minimum of three (3) to five (5) finalists will be selected for interviews. On basis of the interview and follow-up reference checks, one firm will be selected to develop a contract for CM/GC services.

Only those companies that can demonstrate recent experience in university and/or commercial housing projects of similar size and scope will be considered for this Project. Of those, preference will be given to contractors familiar with the regional construction industry market.

VI CONTRACTOR SELECTION SCHEDULE

The timetable for this RFP process is as follows:

July 16, 17 & 18, 2001	Advertise RFP
August 14, 2001	Submit Proposal to WOU
August 20, 2001	Complete Selection Committee Review & Schedule Interviews with Finalists
August 23, 2001	Mandatory site walk-through w/ Finalists
August 29 & 30, 2001	Interview Finalists
August 31, 2001	Selection and Notification of Top Candidate

VII SCOPE OF SERVICES

WOU is seeking a CM/GC firm to coordinate and manage the building process as a member of a team made up of WOU, the architect and other Project consultants. In addition to expertise in construction methods, techniques, and coordination, the CM/GC firm should be skilled and/or knowledgeable in the following areas as related to the construction industry: schedule development, cost estimating, plans review, value engineering, constructability analysis, and applicable building codes and regulations. The CM/GC must also be familiar with the local labor and subcontracting market and be capable of working directly with subcontractors to generate viable pricing alternatives.

The key personnel assigned to this Project must have good communication skills. These people will be expected to participate in all design team meetings and activities throughout the design and construction phases.

The ideal CM/GC candidate will also be able to supply its own labor force and be prepared to bid on various portions of the Project, as outlined in the Agreement.

The CM/GC shall perform services in a constructive and productive manner in support of major decisions made by WOU and design team throughout the Design Development and Contract Document phases.

VIII INSTRUCTIONS TO RESPONDENTS

Respondents must observe the following requirements when submitting proposals:

Proposals must...

- follow the content format outlined below.
- be signed by an officer of the firm.
- address the insurance requirements contained in the Oregon State Board of Higher Education Standard General Conditions (attached as Appendix B)
- not exceed 25 pages including pictures, charts/graphs, tables and text. Material must be presented with text no smaller than 12-point type.
- note the contractor's Oregon Construction Contractor's Board registration number. Failure to be registered will be sufficient cause to reject a proposal as "non-responsive."

- list any previous contracts awarded through a CM/GC process.

The following items constitute a basis for the committee's scoring process (see Proposal Evaluation section below). Proposals must address each of these items. Please follow the stated format.

1 Firm Background (Weight = 1)

Describe your firm's history. Include information identifying the firm's annual volume, financial/bonding capabilities, and the firm's stability in the marketplace. Identify the firm's particular strengths and special capabilities. Include a company-wide organizational chart that identifies key personnel by position who would be assigned to this Project.

2 Firm Workload (Weight = 1)

Provide the status for current work within the firm and in terms of time and magnitude and discuss capacity to undertake this Project.

3 Firm Experience and Success (Weight = 3)

Describe your firm's relevant experience with:

- projects of similar size, type and complexity. Identify which project(s) most closely resembles WOU's Campus Student Housing Project and why.
- Construction Manager/General Contractor (CM/GC) projects
- projects for the Oregon University System (OUS)

Describe your firm's success in completing projects with similar schedules.

4 Experience of Key Personnel (Weight = 3)

For all management personnel, identify the length of their employment with your firm, their responsibilities in relation to this Project, and their primary office location.

Specifically identify proposed on-site management personnel. Describe their specific experience on projects of similar size and scope. Indicate their availability for this Project during the pre-construction and construction phases.

Provide a list of management individuals by job classification and define the relationship that they would have to this Project.

5 Claims Against WOU (Weight = 2)

Provide a narrative referencing other documents as applicable defining the firm's philosophy regarding claims against WOU. Please specifically address philosophy and actions on general, subcontractor and material supplier claims associated with delays, deficient documents, strikes and differing site conditions. Describe any efforts made to minimize these claims.

6 Proposed Site Coordination (Weight = 1)

Describe your firm's approach to the management and administration of on-site construction activities. Address mobilization, construction staging, site access, vehicular circulation, pedestrian circulation, noise, etc.

Identify constraints on construction activity in relation to inclement weather conditions.

Describe company policies and programs established to maintain on site safety.

Describe company philosophy, policy, and experience related to recycling construction debris.

7 Project Management (Weight = 2)

Describe the procedures your firm will utilize in the administration of this Project. At a minimum, identify the firm's skill and process in planning, scheduling, phasing, and monitoring projects. Describe how your firm stays current with industry standards in this area, and how these elements will benefit the Project's schedule and budget.

Define your expectations for the role of WOU and Architect. Describe the method of anticipated interaction between your firm and WOU and Architect.

8 Value Engineering/Cost Estimating (Weight = 3)

Describe your firm's methodology and experience with Value Engineering/Cost Estimating. Identify any particularly successful experiences and/or unique services your firm provides in this area. Identify areas of concern or opportunity.

9 Fee Reimbursement (Weight = 2)

- CM/GC Fee

Identify your Construction Management Fee as a percentage of the Estimated Cost of the Work (assumed to be \$8.26 million for this purpose) of work for this Project. This fee is to include at a minimum the management and construction elements specified in the appendices attached to this document.

- Pre-construction Services Fee

Indicate the basis for your fee, if any. For example, list hourly rates for personnel or list cost by task, such as value engineering, constructability review, assistance to WOU and Architect on design review, etc.

10 Scheduling (Weight = 2)

Provide a tentative schedule related to this Project and describe your firm's method and means of meeting the deadline.

11 References (no weight assigned)

Provide the names and current phone numbers of individuals representing three (3) Owners, three (3) Sub-Contractors, and three (3) Architects to be used as references for the key personnel identified in this proposal. Verify that the references identified had direct contact with your team member and had

direct involvement with the referenced Project.

While this question will not be uniquely scored, the results obtained in reference checks will be used to score all evaluation criteria. WOU may also check with other references that can provide qualification information on the submitting firm.

12 Agreements (no weight assigned)

WOU plans to use a version of the draft Agreement, Standard General Conditions, Performance/Payment Bond, and Tax Compliance Certificate, attached as Appendix A - D, as a basis for this Contract. List any concerns or modifications your firm will propose to these documents.

Proposals should be limited to 25 single sided pages including pictures, charts, graphs, tables, and text. Page size is limited to 8 1/2 x 11 inches with basic text information no smaller than 12 point type. The front and back cover, tab pages, and resumes of your key personnel, will not be counted within the 25 page maximum.

IX PROPOSAL EVALUATION

WOU's choice of the CM/GC will be made on the basis of scoring developed through the RFP submittal and interview process. The interview will be the final phase of the selection process.

The RFP selection committee will score each application on the basis of responses to the ten categories listed above. Each category will be scored individually by each committee member on the basis of 1 to 10 points (10 representing excellence). Each category total will be multiplied by the weight identified for that category. (If no weight is indicated, none is given.) The individual scores will be totaled to determine the highest rated firms. Item #11 requests information regarding references for individuals that will be connected with the Project. This item will not be uniquely scored, however, results obtained from these and/or other reference checks will be utilized in scoring the other categories. A maximum of two hundred (200) points is possible.

X PROPRIETARY INFORMATION

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

The Oregon Public Records Law exempts from disclosure only bona fide trade

secrets, and the exemption from disclosure applies only "unless the public interest requires disclosure in the particular instance". Therefore, non-disclosure of documents or any portion of a document submitted as part of a response may depend upon official or judicial determination made pursuant to the Public Records Law.

In order to facilitate public inspection of the nonconfidential portion of the proposal, material designated as confidential shall accompany the proposal, but shall be readily separable from it. Prices, makes, model or catalog numbers of items offered, scheduled delivery dates, and terms of payment shall be publicly available regardless of any designation to the contrary.

XI PROTESTS

Solicitation Protests:

Proposers may request a change of particular solicitation provisions, specifications, and conditions including comments on any specifications that a firm believes limits competition. Submit requests to: Paul Finke, Facilities Engineer, Western Oregon University, 345 N Monmouth Avenue, Monmouth, OR 97361. Protests shall be received by Paul Finke no later than 5:00 p.m. August 6, 2001. Such requests for change shall include the reasons for the request and any proposed changes to the solicitation provisions, specifications, and conditions.

Selection Protest:

Any proposer who claims to have been adversely affected or aggrieved by the selection of a competing proposer shall have five (5) calendar days after notification of CM/GC selection to submit a written selection protest. Address letters of protest to: Katherine J. Shears, Manager, Facilities Planning and Capital Construction, Western Oregon University, Monmouth OR 97361. Written protests must be received by 4:00 p.m. of the fifth day after the post marked date on the selection notification letter.

XII SUBMITTAL AND INTERVIEW INFORMATION

Proposals must be received no later than 3:00 PM, Tuesday, August 14, 2001. Documents received after that time will not be considered.

Submit ten (10) copies of proposals to:

Katherine J. Shears
Western Oregon University
Planning Office
345 N. Monmouth Ave
Monmouth Oregon

A mandatory site walk-through will be held Thursday, August 23, 2001, 10:00 a.m. at Physical Plant Conference Room. Up to five (5) finalists will be invited to attend this

walk through. The purpose of this walk-through is to explain the Project requirements and answer any questions. Attendance at site walk-through is mandatory. Proposals submitted from finalists who do not attend will not be considered.

Interviews will be held on August 29 and 30, 2001. Time and location of the interviews are yet to be determined. Not more than the five (5) highest scoring firms will be invited for interviews.

Each interview is scheduled for no more than 35 minutes for presentations and 15 minutes reserved for questions by the Committee. The entire process will not exceed more than one (1) hour in duration, 50 minutes for presentation/questions plus 10 minutes set up. Members of the CM/GC's on-site management team are encouraged to be present at the interview.

XIII CONTACT INFORMATION

All questions and/or comments regarding this RFP should be directed to either:

Katherine J. Shears
Manager, Facilities Planning and Capital Construction
Ph: 503 838-8042
Fax: 503 838-8081
E-mail: shearsk@wou.edu
or
Paul Finke
Facilities Engineer
Ph. 503 838-8129
Fax: 503 838-8081
E-mail: finkep@wou.edu

XIV APPENDICES

The following appendices are included in this RFP:

- Appendix A: CM/GC Form Agreement
- Appendix B: Standard General Conditions
- Appendix C: Performance & Payment Bond
- Appendix D: Tax Compliance Certificate
- Appendix E: BOLI Prevailing Wage Rates

END OF RFP