

EPHRATA SCHOOL DISTRICT – GC/CM

- EPHRATA SCHOOL DISTRICT 2023 PROJECT

1. Could you share past data of MBE/DBE/SBE utilization for each line item or at a minimum share goal/requirement/forecast vs actual on each line item. If you did not track – place “X”.

Previous projects for Ephrata School District have been done as traditional Design-Bid-Build projects, as such MBE/DBE/SBE utilization has not been tracked. One advantage of switching to the GC/CM project delivery model will allow the school district to set and track MBE/DBE/SBE utilization goals for the project.

2. What is the DBE/WMBE goal/requirements for this project?

The GC/CM RFQ and contracting requirements will include the Washington State aspirational goals for diverse business inclusion as follows: 20% local business, 10% minority owned, 6% women owned, and 5% small business enterprises. This aspirational goal will be tracked through the project pre-construction and construction administration phases to compare the goal with the actual representation of the diverse businesses. Again, this is a public benefit that occurs using the GC/CM project delivery method.

Please see the attached inclusion plan.

3. Your Management team (Dax and Dolly), according to the project experience chart, has a total of one \$14.5M GC/CM project to the resume. What additional resources does CSG have to support GC/CM procurement and execution since this will be the district’s first venture into alternative delivery?

The GC/CM project delivery method is not a process that been utilized much in eastern Washington in past, but due the pandemic and rising construction costs we’ve been looking at alternative methods on maximizing the district funds to complete their bond obligations. CSG has additional resources available to assist in both the Kennewick office and Vancouver office where both teams have recently completed successful GC/CM projects.

4. Organizational controls are not actually depicted within the application. Please explain the roles and responsibilities and authority levels established for the project/program that have been noted as established in the application.

Dax Logsdon will be responsible for maintaining the budget for the project, he will oversee the design phase and GC/CM pre-construction phase up through GMP definition. At this point he will oversee at the executive level and not be involved in the daily activities. Dolly will assist Dax during the design and bidding phase. She will be responsible for financial controls of the projects. Dolly will also assist Dan Gordon as needed on daily tasks. Dan Gordon, who was not shown on the application will be the responsible in charge during the construction portion. He will be responsible for the following but not limited to: meeting minutes, change order review, pay application review and final submission to the district, quality control.

Design West Architects will provide design team management, and lead interaction with the GC/CM on scope, schedule and cost topics. This involvement will inform CSG’s management and control of the overall process.

CAPITAL PROJECTS ADVISORY REVIEW BOARD

PROJECT REVIEW COMMITTEE

QUESTIONS RE: PROJECT APPLICATION

Meeting Date: January 26, 2023

5. The response in the application related to your “planned GC/CM procurement process” discusses your internal determination for use of GC/CM. Please briefly explain your process for procuring the GC/CM.

Following approval by the PRC for Ephrata School District’s use of GC/CM, CSG and Design West will assist the school district with advertising and distributing an RFQ for the GC/CM services. Preliminary indications from a variety of contractors suggest there would be interest in the market to pursue this opportunity. The RFQ would focus on experience with similar projects and availability to assist with the pre-construction services in a collaborative manner from March through July of this year.

6. According to schedule the GC/CM is not coming on board until end of DD, and only looking to utilize 3 months of pre-construction services. What value are you anticipating being able to get from the GC/CM in the limited time and status of the drawings, timeline and such already defined?

The GC/CM will be of high value during the remaining pre-construction steps. The GC/CM will provide current market budgeting, logistic phasing, bid packaging, and the opportunity to identify and pre-order long-lead time items. The project design is sufficient for the GC/CM to provide input immediately and throughout the final pre-construction stages of the project. This input will result in a successful result, due the collaborative and complimentary nature of the project management, design team, and construction portions of the overall team.

7. How have you evaluated General Contractor’s efforts in the past? Please share the missing data from Attachment A. If the project is in progress, please share the up-to-date data.

The projects that are missing data at the top of Attachment A are the projects that GC/CM is being requested for at this time. The data for the two current projects has been inserted as available currently, please see the attachment to this document.

8. Regarding question 10; What are the list of requirements you/applicant require the General Contractor to use? What will the project require and who will manage their progress?

The project team will include the requirement for the diverse business inclusion plan to be a part of the submittal requirements for the GC/CM’s statements of qualifications. The goals for this will be what is described in the response to question 2. In turn this will be incorporated into the Gc/CM’s contract requirements, and progress toward the goal will be reported to CSG and Design West at the major buy-out milestones on the project.

9. Your current projects in construction are noted as still not complete, can you provide status of those completion and any potential budget concerns on those that may impact your overall budget available for the execution of these 3 projects knowing that bond funds are limited.

The two on-going projects are progressing toward completion, and have progressed to the point where major unforeseen conditions are unlikely. Columbia Ridge Elementary School is scheduled to be completed early in the summer, and Ephrata Middle School is scheduled to be complete mid-fall. These projects are progressing closely to the budget forecasts, but a few remaining questions regarding delay claims and shifted work costs will have some impact on the remaining available funds. This potential variation is another reason that GC/CM is being requested to allow for adjustments to scope in an efficient way on the remaining projects.

10. Where are temporary facilities costs for design, construction, and moves identified in the project budget? How do temporary facilities affect the schedule?

The district already has (4) double classroom modular classrooms that will continue to serve as a swing space through the course of these project, and the temporary classrooms illustrated as the initial phase of the overall work will accommodate the phased work at Grant Elementary School. Temporary facilities costs are included in the basic construction costs as these are included in the contracted scope of work for the project. Costs incurred by the school district for moves and temporary storage costs are carried by the district in their operations budget. The schedule for these moves is included within each phases time frames. The school district is completing two projects that included on-site phase moves, and these change overs has gone smoothly.

11. The Project budget notes \$0 for contingency, please explain.

The originally submitted project budget mistakenly left the line item for contingency blank, please reference the revised budget shown below:

<i>Costs for Professional Services (A/E, Legal etc.)</i>	\$3,798,240
<i>Estimated project construction costs (including construction contingencies):</i>	\$25,690,330
<i>Equipment and furnishing costs</i>	\$974,448
<i>Off-site costs</i>	\$0
<i>Contract administration costs (owner, cm etc.)</i>	\$696,208
<i>Contingencies (design & owner)</i>	\$835,449
<i>Other related project costs (briefly describe) Permits, Utility Fees,</i>	
<i>Third Party Inspections, Legal, Bid Advertising, etc.</i>	\$1,210,630
<i>Sales Tax</i>	\$2,157,987
Total	\$35,363,293

12. When was the budget on the three buildings developed? This would help the panel to understand the legitimacy of the \$26,525,000 budget during this past 18+ months of price escalation and supply chain issues.

Project budgeting was originally completed with the 2019 passage of the school district’s bond. The projects that were contemplated in that bond have been re-budgeted several times as the market conditions have evolved over the past 2 to 3 years. The latest budget was completed in the fall of 2023 and represents the school district’s current funding availability. The market escalation has resulted in the scope of the project being reduced to reflect the current construction costs. The GC/CM project delivery method will allow more immediate feedback in this process of reducing project scope to match available funding.

13. Will you be considering the EC/CM procurement method to help you attain your 2-year schedule illustrated on Page 3? With major equipment lead times exceeding over a year to order major electrical and mechanical equipment, you will have to consider the EC/CM & MC/CM procurement and possibly extend your schedule. How will this be addressed?

This question is under consideration, however our project team would like to involve the selected GC/CM partner in this decision. The 2-year schedule is ideal, but not critical to the success of the project. Based on input from the selected GC/CM we will consider the trade-offs of adding time to the completion schedule to allow greater competition in the sub-trade bid packages. At this time Ephrata School District would prioritize money over time. If the project schedule is extended and more project can be realized as a result that would be preferred.

INCLUSION PLAN

EPHRATA SCHOOL DISTRICT

We, the Bidder/Proposer identified below, if awarded this Project, agree to make efforts to assist the Ephrata School District in achieving the goals identified herein and to submit for approval an outreach plan as discussed herein.

1. General Information

1.1 In accordance with Chapter 39.19 RCW, it is the policy of the State of Washington to provide the maximum practicable opportunity for increased participation by state-certified minority and women-owned and controlled businesses (MWBE) in public works. The Washington State Office of Minority and Women's Business Enterprises (OMWBE) certifies firms that are owned and controlled by minorities or women and can provide information regarding the certification process. Information about the certification status of a particular firm is available at the following OMWBE website address: <http://www.omwbe.wa.gov>, or by contacting OMWBE at (360) 753-9693, 406 South Water, P.O. Box 41160, Olympia, Washington, 98504-4611.

1.2 In accordance with this State policy, the Ephrata School District (Owner) has committed to the following goals:

1.2.1 Attempt to increase the local share of total construction to 20%; and

1.2.2 Attempt to meet the Governor's diverse business goals of 10% participation by minority-owned businesses, 6% participation by women-owned businesses, and 5% participation by small business entities in construction.

1.3 In promoting this State policy, if Bidder/Proposer is awarded this contract and becomes the "Contractor" as that term is used in the Contract Documents, then Contractor agrees to implement an Owner-approved outreach plan describing the activities and strategies that the Contractor will employ to promote the inclusion of small business entities (SBE) and minority-owned businesses and women-owned businesses (also referred to as disadvantaged business enterprises, or DBE), as Subcontractors and suppliers for this Project. In addition to addressing outreach to SBE's and DBE's, the outreach plan shall describe the specific activities the Contractor will undertake in its efforts to meet the aspirational goals for utilization of state-certified MWBE.

1.4 In submitting its bid/proposal and agreeing to implement an Owner-approved outreach plan, Bidder/Proposer and Owner agree and hereby reaffirm that there are no minimum local, SBE or DBE participation requirements for this Project, and that the percentage goals stated above are purely goals and not requirements. There are no quotas for this Project. Contractor's obligation is to provide and implement an Owner-approved outreach plan.

2. Outline of Outreach Plan

2.1 The Contractor's outreach plan should address at a minimum how the Contractor will achieve the following:

2.1.1 Advertising opportunities for potential Subcontractors and suppliers in a manner that is reasonably designed to provide timely notice of such opportunities to SBE's and DBE's that are capable of performing the work and encouraging participation by these firms. Advertising may be done through general advertisements (e.g., newspapers, journals, etc.) or by soliciting bids/proposals directly from such firms.

2.1.2 Providing SBE's and DBE's that express interest with adequate and timely information about plans, specifications, and requirements of the Contract.

2.1.3 Conducting at least one outreach meeting for the purpose of familiarizing SBE's and DBE's with the Contractor's Subcontract bidding requirements, procedures, the nature of the Subcontract bid packages, and any other information or training opportunities that would provide these firms with the knowledge and skills necessary to support the preparation of responsive bids as first-tier Subcontractors or suppliers or as sub-tier Subcontractors or suppliers to first-tier Subcontractors and suppliers. Each meeting shall be advertised in a manner so as to provide reasonable notice of the subject matter, date, and time of the meeting, including, but not limited to, notices placed on the OMWBE website and in the Columbia Basin Journal.

2.2 The Contractor is also encouraged to address the following in its outreach plan:

2.2.1 Breaking down total requirements into smaller tasks or quantities, where economically feasible, in order to permit maximum participation by SBE's and DBE's.

2.2.2 Establishing delivery schedules, where the requirements of this contract permit, that encourage participation by SBE's and DBE's.

2.2.2 Reducing any bonding requirements where practicable and allowable by statute.

2.2.4 Utilizing the services of available minority community organizations, minority contractor groups, local minority assistance offices and other organizations that provide assistance in recruitment and placement of SBE's and DBE's.

2.2.5 How Contractor met any of the above outreach goals prior to being awarded the contract.

3. Reporting Requirements

3.1 Prior to Application of First Progress Payment, Contractor agrees that it shall submit a list of all SBE and DBE Subcontractors and suppliers it intends to utilize on the Project, and

Contractor shall identify which firms are currently state-certified MWBE's and include their respective certification numbers.

3.2 On a quarterly basis, Contractor shall submit a report in a format acceptable to the Owner providing a list of the SBE and DBE firms utilized, the payments made to each, and identifying which firms are currently state-certified MWBE's and including their respective certification numbers.

3.3 Prior to Final Acceptance, Contractor shall submit a report of total dollar amounts paid to each SBE and DBE.

3.4 Non-Discrimination

Contractors shall not create barriers to open and fair opportunities to all businesses including MWBE's to participate in this Project and to obtain or compete for contracts and Subcontracts as sources of suppliers, equipment, construction and services. In considering offers from and doing business with Subcontractors and suppliers, the Contractor shall not discriminate on the basis of race, ethnicity, color, creed, religion, sex, age, nationality, marital status, or the presence of any mental or physical disability in an otherwise qualified disabled person.

3.5 Sanctions

Failure to comply with any of the mandatory requirements of this Inclusion Plan may subject the Contractor to sanctions or damages as provided for by RCW 39.19.090, by other applicable laws, or by this Agreement.

Respectfully submitted,

(Name of Firm)

By:

(Signature)

(Type or Print Name of Signer)

(Title)

EPHRATA SCHOOL DISTRICT

Construction History

1/24/23 update

<i>Project Name</i>	<i>Project Description</i>	<i>Total Project Cost</i>	<i>Delivery Method</i>	<i>Lead Design Firm</i>	<i>General Contractor</i>	<i>Planned Constuction Start</i>	<i>Planned Finish</i>	<i>Actual Start</i>	<i>Actual Finish</i>	<i>Original Construction Budget</i>	<i>Final Construction Budget</i>	<i>Reason for Budget / Schedule Overrun</i>
Ephrata HS Gym & Performing Arts Center	Modernization of existing facility	\$12.7M	GC/CM	Design West Architects	TBD	August 2023	March 2025					
Beezley Springs	Modernization of existing facility	\$7.5M	GC/CM	Design West Architects	TBD	August 2023	August 2025					
Grant Elementary	Modernization and Addition of existing elementary school	\$15.1M	GC/CM	Design West Architects	TBD	August 2023	August 2025					
Ephrata Middle School	Modernization and Addition of existing middle school	\$28.6M	D-B-B	Design West Architects	Fowler General Construction	July 2020	December 2022	October 2020	Projected: September 2023	\$23.1M	Current: \$24.5M	Impacted due to pandemic
Columbia Ridge Elementary	Modernization and Addition of existing elementary school	\$22.4M	D-B-B	Design West Architects	Fowler General Construction	May 2020	August 2022	October 2020	Projected: July 2023	\$17.5M	Current: \$18.5M	Impacted due to pandemic