



DRAFT

**Request for Proposal for
Construction Manager at Risk Services**

**ASHRAE
New Headquarters Building
Peachtree Corners, GA**

21 January 2019



1. INTRODUCTION AND PROJECT DESCRIPTION

A. Introduction

On behalf of ASHRAE, Collins Project Management (CPM) has prepared this Request for Proposal (RFP) to select a Construction Manager to provide preconstruction and construction services for the renovation of an existing building for the next ASHRAE headquarters in the Atlanta metropolitan area.

ASHRAE, founded in 1894, is a not-for-profit global society advancing human well-being through sustainable technology for the built environment. The Society and its more than 56,000 members worldwide focus on building systems, energy efficiency, indoor air quality, refrigeration, and sustainability. Through research, standards writing, publishing, certification and continuing education, ASHRAE shapes tomorrow's built environment today. More information can be found at www.ashrae.org.

ASHRAE plans to renovate a building located at 180 Technology Parkway in Peachtree Corners, GA to serve as the future global headquarters of the Society. The renovated facility will provide an outstanding working environment for approximately 145 ASHRAE employees and provide extensive training and meeting space for ASHRAE members and volunteers.

The 67,000-sf building was built in 1978. The project is intended to demonstrate economical renovation of an existing building to net-zero energy or net-zero energy ready condition. This very public project will be closely watched by the global built environment, affording outstanding publicity for those participating. The building is owned by ASHRAE and the new headquarters must be occupied no later than September 2020.

The Owner's Project Requirements (OPR) is attached to this RFP as **Exhibit D** and has been developed by the Owner and establishes ASHRAE's goals for the New ASHRAE Headquarters. Every effort has been made to make the OPR as comprehensive and complete as possible to minimize future changes. However, the OPR will be considered a "living" document during the design phase of the project, and as such is subject to change as the design progresses. By establishing the goals of the new ASHRAE Headquarters in a single document, the OPR becomes a record by which ASHRAE and other parties involved in the project can judge the degree of success in meeting the owner's defined objectives and criteria. In part, the success of the project will be tracked by the minimization of the need to change core tenets of this document.

An ad hoc committee has been established by ASHRAE to oversee the development of the new headquarters. Collins Project Management (CPM) has been selected to represent ASHRAE's interests during the planning, design, construction, commissioning, and occupancy of the new headquarters. Greg Kerr, Sr. Project Manager, will be the primary contact. John McFarland with WorkingBuildings, as a subconsultant to Collins Project Management, will be advising and guiding the Owner on sustainability and energy efficiency issues but will not provide services normally associated with a LEED or Energy consultant.

Additionally, the selection process for the design team is underway and is expected to be completed during the first week in February.

B. Construction Delivery Strategy

A competitive RFP process will be utilized to select a construction manager (CM) with "deep green" experience and a proven track record on projects of this size and type to provide preconstruction and construction services. The selected CM will provide preconstruction services throughout all phases and if a mutually agreeable Guaranteed Maximum Price contract can be agreed upon, the firm will then be authorized to proceed with construction.

Integrated Design Process (IDP) will be utilized during all phases of design to optimize value, performance, energy efficiency, sustainability, and maintenance requirements for the new headquarters. In keeping with the intent of the IDP, the MEP and possibly other key subcontractors will be selected and negotiated by the CM (with ASHRAE approval) and brought into the process to participate beginning with schematic design and initial cost estimating.

C. Budget

The total renovation budget is \$8,550,000 excluding photovoltaic arrays.

D. Timeline

The Overall Project Schedule (OPS) is included as **Exhibit A** and reflects the project team's current thinking with respect to the timing of the work. It is preliminary in nature and will be refined with input from the design team and the construction manager during the design and preconstruction phase. The OPS indicates the selection of a CM partner will be made early in the schematic design phase.

2. SCOPE OF SERVICES

Preconstruction services will include normal and customary tasks and responsibilities including construction and project planning, conceptual budgeting, construction cost estimating, development of subcontractor relationships and selection of subcontractors, drawing and constructability reviews, life-cycle costing and analysis, value engineering and value analysis, early procurement, and other typical preconstruction services.

A budgeting & cost plan will be developed at the outset of the project. Continuous budgeting and cost estimating will be required during each of the design phases to provide immediate feedback regarding design and sustainability options. A formal cost estimate will be generated at each milestone as shown on the attached OPS.

Construction phase services will include normal and customary services including procurement, buyout, permitting, planning, scheduling, quality control and quality assurance, safety, construction, occupancy, commissioning, and closeout of the project. Throughout the construction phase, special attention will be required regarding adherence to the sustainability requirements in order to meet the targeted goals, includes producing the required documentation in a timely manner.

Note that a Commissioning Agent (CxA) will be engaged under contract to the Owner. The design team and construction team shall coordinate and consult with the CxA on an ongoing basis throughout design and construction.

3. SUBMITTAL REQUIREMENTS

The following information should be provided in your written response to this Request for Proposal and must be organized and submitted in the order shown.

A. Corporate and Financial Information

1. List company name, address of office that this Project will be managed from, and contact information for the primary contact for your proposal.

B. Proposed Team Members

1. Provide a project team organizational chart identifying all key individuals that would be a part of your management team for the project.
2. Provide a resume describing the qualifications, background, and experience with deep green projects of each key individual that you propose for your team.
3. Describe your process for selecting MEP and other key subcontractors for negotiation.

C. Project Services and Approach

1. Describe (briefly) your experience with other deep green projects (LEED Platinum, Living Building Challenge, Net Zero Energy) your team has worked on and that you think are similar to the ASHRAE Headquarters project.
2. Describe your approach to preconstruction services including descriptions of specific tasks and deliverables, and the outcomes that ASHRAE should expect as a result of performing those services.
3. Describe services, methods, tools, or deliverables provided during the construction phase that you feel are unique to your team or your approach.
4. Describe your track record utilizing Integrated Design Process on similar projects.
5. Describe your proposed methods for soliciting and evaluating subcontractor and supplier pricing during the preconstruction phase.
6. Describe your recommended strategy and approach to selection of major subcontractors.
7. Describe your capabilities and proposed approach to utilizing the BIM (Revit) model produced by the design team and how you would anticipate utilizing it for the ASHRAE project.
8. What process and tools do you use for scheduling projects and how do you communicate with the owner and design team on schedule issues? Provide examples of near term and overall project schedules.
9. Describe your suggested approach and company policies with respect to the bonding of subcontractors.
10. Identify key issues or challenges that the ASHRAE project presents and describe how you will manage and control them.
11. Describe any other aspects of your company's capabilities or approach to delivering projects that you feel are key differentiators or provide added value for your clients.

D. Owner-Contractor Agreement

A copy of the proposed Owner-Construction Manager Agreement, including General Conditions, is included as **Exhibit B**. Also note that:

- Compensation for Preconstruction Services will be a lump sum.
- General Conditions will be a component lump sum within the overall Guaranteed Maximum Price.
- All savings will accrue to the Owner.
- All scopes of work will require multiple bids with the exception of the subcontractors who will be selected on a negotiated basis.
- General conditions may be added to change orders only if it can be clearly demonstrated that the scope of the change order directly impacts the critical path.

- Estimating, project management, and administrative costs that are incurred in pricing and administration of change orders are assumed to be included in the project's general conditions and/or change order fee.
- CM Fee (Overhead and Profit) applied to change orders (additions and deletions) will be the same as the base Fee quoted for the project.
- The CM will be required to certify that none of the items defined as general conditions will be purchased or procured through reimbursement of any subcontractor, supplier, consultant, or outside party.

In your response, provide the following:

1. Specific changes to the contract, including proposed revisions that you would require in order to be able to execute the agreement. Any comments or requested changes not provided with your response to this RFP will be deemed waived.
2. The Owner-Construction Manager agreement states that work which is "reasonably inferable" from the contract documents is to be included within the scope of the Guaranteed Maximum Price. Please describe how you interpret this language and give several specific examples of: 1) items that would be included in your GMP price when interpreting this clause, and 2) items that would not be included and would thus require a change order to perform.

E. Insurance

Provide a certificate evidencing your firm's coverage for worker's compensation, employer's liability, general liability including completed operations, automobile liability, professional liability (to cover design/build components of the work) and excess liability umbrella that is consistent with the requirements of the contract.

4. COST OF SERVICES

Complete the "Cost Proposal Summary" that is included as **Exhibit C**. Please note that the Excel spreadsheet includes the following individual worksheets:

Cost Proposal Summary Sheet

Attachment 1 (Preconstruction) is to be used to develop your lump sum compensation proposal for preconstruction services.

Attachments 2 (GC Labor) and 3 (GC Non-Labor) are to be used to develop your General Conditions proposal. If there are items you typically include in General Conditions that are not listed, please add them to the Summary in the spaces provided.

Attachment 4 is provided to allow you to describe any exclusions or clarifications that might apply to your cost proposals.

The worksheets define certain line items as (1) Cost of the Work (COW) and thus reimbursed at actual cost outside of your general conditions, and (2) included in your Fee (OH&P) and thus not reimbursable. Please develop your General Conditions and fee proposals accordingly.

The Cost Proposal Summary should not be reproduced and included with your response to Section 3. It is to be submitted separately as described in Section 6. If any of these instructions are unclear, or if you have any questions regarding the Cost Proposal Summary, please submit a request for clarification via email to Greg Kerr at Collins Project Management as described in Section 7.

5. SELECTION TIMELINE AND PROCESS

The anticipated schedule of activities for Contractor selection, which is subject to change, is as follows:

Issue Request for Proposal	21 January 2019
Site Visit	24 January 2019 at 10:00 am
Deadline for Questions	28 January 2019
RFP Responses Due	1 February 2019 at 3:00 pm
Short List announcement	6 February 2019
Interviews	13 February 2019
Selection Announcement	15 February 2019

6. SUBMITTAL INSTRUCTIONS

Your submittal will consist of two **separate** documents:

Please forward your **response to Section 3** in electronic format to the following:

Greg Kerr
Sr. Project Manager
Collins Project Management
gkerr@collinspm.com

Jeff Littleton
Executive Vice President
ASHRAE
jlittleton@ashrae.org

Please forward your **Cost Proposal Summary** in electronic format to the following **ONLY**:

Greg Kerr
Sr. Project Manager
Collins Project Management
gkerr@collinspm.com

Hard copies of your proposal are not required. Fax copies of your proposal will not be accepted.

7. ADDITIONAL INFORMATION

Inquiries. All questions about the Project or the meaning or intent of this RFP shall be submitted via email to:

Greg Kerr email address: **gkerr@collinspm.com**

Do not contact any individuals affiliated with ASHRAE or the design team. Failure to follow these instructions may result in disqualification of your team.

Late Proposals. It is the Proposer's responsibility to ensure its Proposal is delivered and received on or before the time and date specified. Proposals received after the date and time specified will not be considered.

All proposals become property of ASHRAE once received. ASHRAE reserves the right to reject any or all proposals and to waive technicalities and informalities.

Attachments

The following documents are considered an integral part of this Request for Proposal:

Exhibit A	Overall Project Schedule (preliminary)
Exhibit B	Owner-Construction Manager Agreement and General Conditions
Exhibit C	Contractor Cost Proposal Summary with Attachments 1 through 4
Exhibit D	Owner's Project Requirements

Conflict of Interest

The respondent agrees to be bound by the following requirements:

Except as identified in the proposal or as specified in the contract, the respondent must certify in its proposal:

- That no person either natural or body corporate, other than the respondent, has or will have any interest or share in this proposal or in the proposed contract, and
- There is no collusion or arrangement between the respondent and any other respondent(s) in connection with this project, and
- The respondent has no knowledge of the contents of other proposals

and has made no comparison of figures or agreement or arrangement, express or implied, with any other party in connection with the making of the proposal.

Respondents chosen to participate in this RFP process shall disclose prior to entering into an agreement any potential conflict of interest. If such conflict does exist, ASHRAE may at its discretion withhold the award of a contract from the respondent until the matter is resolved. Membership in ASHRAE and participation in ASHRAE activities shall not be deemed a conflict of interest. No volunteers on the ASHRAE Headquarters Ad Hoc Committee or on the Technical Advisory Subcommittee (TASC) or their associated firms are eligible to respond to this RFP.

Neither the respondent nor any employee of the respondent shall offer or receive any entertainment, gifts, gratuities, donations, discounts, fees, payment, commission, reward, special service, incentive, or other remuneration or compensation of any kind ("inducement"), regardless of value, to or from any employee of ASHRAE, any consultant or contractor employed by ASHRAE, any real estate representative acting on behalf of ASHRAE, or any vendor of goods or services to the project. The respondent agrees to immediately inform ASHRAE immediately upon being offered any such inducement.

The respondent chosen to provide service to the project shall continue to be bound by the foregoing prohibitions after the execution of a contract agreement.

End of Request for Proposal