



October 10, 2018

## **REQUEST FOR QUALIFICATIONS/PROPOSALS – OWNER REPRESENTATION SERVICES**

The San Juan Island Library District (“District”) is in the planning process for development of a new library building and other improvements to real property at a site to be determined in or around Friday Harbor, WA, and is soliciting responses to its RFQ/P for Owner Representation services. It is our desire to assemble a team to see this project through the entire process from site selection, planning, funding and design, through construction and occupancy. This team will include the owner, owner’s representative, architect and general contractor.

The purpose of this RFQ/P is to select the qualified owner representative.

Approximate value of the new building project: \$10,000,000.00

Questions may be addressed to:

Laurie Orton, Director, San Juan Island Library  
lorton@sjlib.org  
360-378-2798

Response should be sent electronically to:

Laurie Orton, Director, San Juan Island Library  
lorton@sjlib.org

Please submit four (4) hard copies of the proposal to:

San Juan Island Library  
Attn: Laurie Orton, Director  
1010 Guard Street  
Friday Harbor, WA 98250

**Deadline:** All submissions must be received by NOVEMBER 9, 2018 at 6:00 pm.

The request for qualifications does not commit District to award a contract or to pay any costs incurred in the preparation of the proposal.

District reserves the right to extend the due date for the proposal, to accept or reject any or all proposals received as a result of this request, to negotiate with any qualified consultant, or to



cancel the RFQ/P in part or in its entirety.

### **Screening and Selection**

A screening committee will review the submittals and rank the applicants. The highest-ranked applicants will be asked to interview.

### **EXPECTED SEQUENCE OF EVENTS (October – December 2018)**

- Receipt of responses to RFQ/P
- Review and selection of qualified applicants
- Interview of highest ranked applicants
- Interview of references
- Selection of successful applicant
- Notification of successful applicant
- Completion of negotiations with candidate
- Notification of unsuccessful applicants; announcement of selection
- Finalization of contract

### **RESPONSE FORMAT AND REQUIREMENTS**

Format:

1. Cover letter
2. Table of Contents
3. Response with pages numbered

Response should include, but not be limited to the following information:

1. Company background, history, and present volume backlog.
2. Description of the proposed organizational approach and an organization diagram showing all key team members.
3. Description of how the following would be addressed:
  - A. Architect and General Contractor selection
  - B. Compliance with Public Building Standards and Requirements
  - C. Project Documentation
  - D. Progress Meetings and Meeting Reports
  - E. Cost Estimating
  - F. Permitting
  - G. Scheduling (a Sample Capital Project Schedule is included in **APPENDIX** only to give a rough idea of one option for scheduling)
  - H. RFIs, RFPs, and Similar Requests for Design or Construction Services
  - I. Quality Oversight



- J. Noncompliance Notices
  - K. Day to Day Site Visits
  - L. Punch List
4. Identification of the project leader.
  5. Identification and description of any sub-contractors (sub-consultants) that will be used.
  6. Provision of client references from 3 public works projects, with contact information.
  7. Identification of 3 architectural and 3 construction firms with whom you have completed projects, with contact information.
  8. Description of any experience working with energy efficiency rating systems, projects certified, certification levels achieved, and lessons learned.
  11. Description of any experience with integrated design or design charrette.
  12. Description of experience with projects involving public financing of public buildings.
  13. Description of any system(s) your firm uses to develop and manage a master budget and schedule for a project this size and to report to District on budget and schedule compliance during the project.
  14. Description of your firm's typical on-site visitation/supervision presence during the construction phase of similar projects and how District's project may differ from such approach.
  15. Description of your firm's process for encouraging high safety standards on construction sites.
  16. Description of any litigation or arbitration to which applicant has been a party within the last five years.
  17. Description of any current or potential conflicts of interest.

## SCOPE OF SERVICES

The owner's representative selected for the Project is expected to act on District's behalf in overseeing the project through site selection, planning, design, construction and into occupancy. The candidate's proposed scope of services should include, but not be limited to, each item listed in **Exhibit A**. If there are additional items your firm considers necessary for the Project that are not included in **Exhibit A**, please identify them and state how the addition of such item would affect staffing levels and fees. If there are items in **Exhibit A** your firm considers unnecessary for the Project or that are not within your firm's capabilities, please identify them and state reasons for their possible exclusion.

## GENERAL REQUIREMENTS

1. General Information



All proposal packages received by District will become District's property for use as deemed appropriate.

The San Juan Island Library is an equal opportunity Employer. Every effort will be made to ensure that all persons, regardless of race, color, creed, religion, national origin, sex (including pregnancy and parenting status), disability, age, veteran status, sexual orientation, gender identity or expression, marital status or genetic information have equal access to contracts and other business opportunities with SJLIB.

2. Insurance

Provision of Certificate of Insurance that, if the applicant is selected, will need to be in force at all times during the contract period. Insurance should include the following coverages:

General Liability	\$1,000,000 each occurrence \$2,000,000 aggregate
Professional Errors and Omissions	\$1,000,000
Automobile Liability Including any Auto, Hired Autos, Non-Owned Autos	Statutory Requirements

3. Workers Compensation

Statutory Limits

- a) Indemnification endorsement covering the additional insured's and owner.
- b) Absence of exclusions for means, methods, techniques, sequences or procedures.
- c) Application of General Aggregate on a per-project basis.

**PROCESS AND CRITERIA FOR EVALUATING QUALIFICATIONS AND PROPOSALS**

District's Selection Committee will evaluate and score RFQ/P submittals based on the following:

- 1. Letter of interest and RFQ/P – 10 points
- 2. Experience and Qualifications – 20 points
- 3. Scope of Services – 25 points
- 4. Schedule – 15 points
- 5. References – 10 points
- 6. Interview – 20 points



## **FEE PROPOSAL**

Candidates invited to an interview as indicated above shall submit a detailed fee proposal including the items set forth below. The fee proposal must be provided in a sealed envelope prior to the start of the candidate's interview. Failure to provide a fee proposal addressing each item listed below may result in disqualification of the firm from the RFQ/P process. Generally, cost or price is weighted heavily. However, it may not be the main determining factor for the Board.

Fee proposals shall include the following:

- Detailed statement of work
- Confirmation that all scope items from the RFQ/P will be addressed
- Any exclusions with explanations.
- Break out of cost or percentages of cost by phase
- Number of hours anticipated by phase
- Breakout of anticipated reimbursables
- Current hourly rate for all personnel anticipated to be involved in the Project
- Breakout of fees for any non-required scope proposed
- Specific identification and description of any clarifications or exclusions related to the proposed fee

## **RESERVATIONS OF RIGHTS**

District reserves the right to select any or reject any and all proposals, as may be in District's best interest. District also reserves the right to pre-qualify and invite for an interview any or all candidates or reject any or all candidates as unqualified, including without limitation the right to reject any or all nonconforming, nonresponsive, unbalanced, or conditional qualifications. District also reserves the right to re-solicit proposals and the right to waive all informalities not involving price, time or changes to work.

District has the sole right to determine which proposal is in its best interest. District further reserves the right to cancel or amend this Request at any time and will notify all candidates accordingly.

## **COST OF PROPOSALS**

Expenses incurred in preparing proposals in response to this RFP/Q are the sole responsibility of



candidates submitting proposal. District assumes no responsibility for payment of any expenses incurred by any candidate submitting a proposal, including without limitation travel or meal costs for any meetings with District representatives during the selection or negotiations process.

#### **MODIFICATION AND WITHDRAWAL OF PROPOSALS**

Candidates may modify or withdraw proposals up to the date and time designated for receipt of proposals, provided that any modified proposals must conform to the RFQ/P. If within 24 hours after proposals are opened any candidate provides written notice to District and promptly thereafter demonstrates to the reasonable satisfaction of District that there was a material and substantial mistake in preparing its proposal, that candidate may withdraw its proposal. It shall be within the complete discretion of District whether such candidate may be allowed to resubmit its proposal.



## EXHIBIT A – SCOPE OF SERVICES

### **General Items**

1. Project oversight – Serve as the single point of contact for District. The primary role is to provide oversight and coordination of the project from District's perspective to effectively balance costs, time and quality.

2. Financing – Work with District to obtain construction and permanent financing, including assisting District in preparing loan application documents and forms. If District retains an investment banking firm, work with District and that firm with respect to proposed financing.

3. Grant Writing – Research and assist District in applying for grants or programs to supplement and enhance the planning, design, program development and construction.

4. Online project management – Develop and maintain an online system for managing the project, including maintaining accurate archive files for owner records. Upon completion, submit an archived disc or other means of storing digital documents.

5. Communications – Provide a monthly status report to District. Attend meetings of District Board or Facilities Committee. Attendance at such meetings may be by conference call or Skype (or similar service) by mutual agreement.

6. Legal – Coordinate with District's legal counsel on legal aspects of the Project and major Project-related decisions

7. Communications flow – Develop a communication organization chart for communication flow and decision-making.

8. Master Budget – Prepare an overall project budget, including hard and soft costs. Generate and track budgets by project components and by total. Establish a process by which changes can be priced, submitted, reviewed and added or subtracted from the project cost. Review and submit, with recommendations, all requests for payment under vendor agreements, provided that all such payments shall be subject to District approval. Update the project budget regularly and provide monthly status reports. Coordinate with District's financial professionals on budget matters. Consider hard and soft costs (i.e., construction, design, management, testing, furnishings, equipment, permitting, connection fees, contingency funds, etc.)



9. Suggested changes – Submit to District suggestions for changes that could improve the design or reduce costs.

10. Schedule – Prepare a comprehensive project schedule, update the project schedule regularly and include with monthly status reports.

11. Outside entity liaison – Act as liaison between District and entities involved in the planning, financing and building process, including assisting in obtaining building permits, other governmental approvals, authorizations and sign-offs as necessary for the design, construction and operations of the project. Meet with fire departments, telecommunications providers, and utilities providers with respect to design and construction.

12. Code compliance – Work with design team to meet current state, county and local codes. Monitor compliance with schematic design, design development and construction document checklists.

13. Building inspections – Work with general contractor and design team to obtain compliance with required inspections. Submit and record final documentation. Obtain and track building inspection authorizations.

14. Notices to proceed – Issue notices to proceed on appropriate phases when all necessary requirements have been met.

15. Notices of substantial completion – Issue notices of substantial completion

16. Notices of approval of occupancy/use – Issue notices of approval of occupancy/use

17. Notices of final acceptance – Issue notices of final acceptance

18. Records management – Maintain appropriate confidentiality and comply with open records process, given the District's status as a governmental entity.

## **Planning Phase**

1. Public input/information -- Work with District to gather community input and make public presentations with respect to facility space and usage needs and desire.





2. Project scope and budget – Work with District to refine the scope of work and project size to be within District's budget, taking into account public input and community needs and desires.

3. Site review – Identify and evaluate potential facility sites. Narrow down to short list of recommendations for Board to consider. Enumerate pros and cons of each.

4. Cash flow projection – Produce a project cash flow projection using an estimated construction budget consistent with District's revenue receipts and borrowing capacity.

### **Procurement Phase**

1. Architect, General Contractor, Engineer – Assist District in preparing requests for qualifications and requests for proposals for architectural, engineering and general contractor services. Review proposals and provide supplemental information. Attend interviews. Negotiate contracts.

2. Other Professional Procurements – Assist District as requested in procuring services of the following professionals, if necessary for the Project, and manage such professional services through completion of the Project:

- a. Architecture firm
- b. Surveyor
- c. Materials Testing consultant
- d. Geotechnical consultant
- e. Hazardous Materials Analysis consultant
- f. Hazardous Materials Abatement firm
- g. Environmental Study firm
- h. Test and Balance firm
- i. Data Cabling consultant
- j. Telecommunications consultant
- k. Technology consultant
- l. Signage firm
- m. Rodent removal firm
- n. LEED consultant, if LEED certification is pursued

3. FF&E (Furniture, Fixtures and Equipment) – Work with District and design team to manage procurement, installation and punch list of FF&E for new facility.



## **Design Phase**

1. Programming – Work with design team to set up, manage and finalize programming documentation and goals, including programming meetings, reviews with District and confirmation of final documents.
2. Insurance – Confirm proper insurance documents are issued and received prior to initial payment.
3. Schematic Design – State Project objectives and review design documents for conformance to District's program.
4. Sustainability – Facilitate and monitor incorporation of sustainable building initiatives into Project at a level and cost deemed appropriate by District.
5. Meetings – Collaborate with District in meetings related to design issues.
6. Document Review – Review design documents and offer suggestions that represent District's interests. Review construction documents for technical accuracy in conjunction with design team and conformance to building program, District's objectives and code requirements.
7. IT Coordination – Facilitate coordination between IT personnel and appropriate design team members.
8. Additional Service Requests – Evaluate and advise District about additional service requests made by design team and vendors.
9. Product & Equipment Selection – Review product selection with District concerning ease of maintenance, warranties, and identification of environmentally responsible products; work with maintenance personnel to standardize equipment and construction materials in the design process.
10. Payments – Review applications for payment and prepare monthly draw request for District.
11. Interior – Review interior design of building and oversee implementation of District's decisions.



12. FF&E – Work with design team to establish FF&E design and review contract documents. Provide recommendations on FF&E drawings submitted by vendors to determine conformance with District's objectives.

13. Estimation – Oversee design estimates and monitor that Project is within budget prior to proceeding to next design phase.

14. LEED – Advise District with decisions regarding LEED certifications, including cost estimates. Coordinate with design team to provide possible Innovation Credits, including educational credits, as needed.

15. Tours – Tour other library facilities as necessary to understand design options.

16. Value Engineering – Suggest to District ideas or changes that may improve design or reduce costs.

### **Construction Phase**

1. Participate in receipt and tabulation of bids and assist design team and District in evaluating bids.

2. Permitting – Work with team to obtain required permits for Project.

3. Insurance – Work with general contractor to establish proper documentation related to bonds and insurance.

4. Meetings – Attend all OAC meetings. Review weekly minutes for accuracy (including but not limited to construction progress, costs, schedule and outstanding issues. Serve as distributor of progress reports.

5. Design Team – Monitor construction phase activities of design and engineering firms, including (a) technical review and approval of materials submittals and samples, (b) resolution of technical questions arising during construction, (c) review and provision of opinions on change orders subject to District approval, and (d) provision of field reports.

6. Alternatives – Evaluate alternatives to be considered for incorporation into final Project.



7. Staging – Assist with placement of construction trailers, fences, signage, staging areas and construction traffic zones.

8. Records – Maintain District's copies of records and permanent project files of necessary design and construction-related communications, including weekly construction progress photographs.

9. District Guidance – Resolve questions asked of District during construction.

10. Observation – Verify that contract terms are enforced. Monitor construction progress to determine compliance with drawings and specifications. Coordinate documenting and photographing of progress. Provide observations regarding quality of workmanship and conformity to plans and specs.

11. Safety – Monitor compliance with all federal, state, and local requirements (not limited to OSHA, EPA and LEED).

12. Updates – Advise District on construction costs, schedule, coordination and District occupancy. Notify District of deviations from project progress or budget.

13. Material Testing – Verify and document that inspections and testing reports take place as required. Review reports and monitor that deficiencies are addressed.

14. Corrective Measures – Address corrective measures as to any non-conforming workmanship per contract documents as identified by architect or contractor. Notify District of work not conforming to contract documents and advise District on methods to resolve issues.

15. Change Orders – Assist District in reviewing pending change orders. Resolve disputes or claims related to approval or denial of change order.

16. Master Budget – Review appropriateness of each pay application with design team and track that lien/claim releases are executed and included with all pay applications and that all disputes or claims are resolved prior to approval of pay application.

17. IT – Assist with scheduling and implementation of technology and security as it applies to the Project

18. Prevailing Wages – Monitor compliance with Washington state and federal



Department of Labor and Industries prevailing wages requirements, including without limitation providing in a timely manner all back-up documentation, recordkeeping, certified payrolls, posting, interviews, staff updates, etc.

### **Close Out, Move In, Post Construction Phase**

1. Punch List – Schedule and assist District in developing punch lists for Project completion and attend all walk-throughs.
2. Stock Material – Coordinate transfer of stock supplies of Materials to District as indicated in specs or construction agreement.
3. Close Out Documentation – Assist District in collecting all close-out documents and acceptance of punch lists, operational/maintenance manuals/warranties, copies of construction drawings (including any as-builts or markups by contractor during construction), specifications, shop drawings, construction directives, photos and videos.
4. Final Budget – Provide description of final budget with record of expenditures. Assist District in acceptance and issuance of final pay application and verify that advertising for final payment has been completed.
5. Certificate of Occupancy ("CO") – Oversee that all third party inspections are complete and all violations are corrected to allow issuance of final CO. If inspections are not complete and building requires immediate occupancy and appropriate inspections indicate there are not life safety issues and a temporary CO is issued, ensure that within 90 days of issuance all inspections are complete to obtain a final CO or renewal of the temporary CO.
6. Project Review – Initiate and participate in a team evaluation of the process and final product, including lessons learned for all participants.
7. Project Commissioning – Monitor final commissioning process with project team.
8. Final Reports & Documentation – Submit a final report, archive online documentation



### **Warranty Period Phase**

1. 11-month Walk-through – Schedule and attend the 11-month warranty walk-through with the design team.
2. Warranty Items – Assist District with building or FF&E issues/complaints and determine steps necessary to address such items. Address warranty items to confirm requirements of warranties are met.